

<b>GOAL AREA #1</b>	
<b>STRATEGIC PLAN IMPLEMENTATION</b>	<i>Lead implementation of the CABE Strategic Plan</i>
<b>RESPONSIBILITIES &amp; DUTIES</b>	<b>CEO REPORT</b>
<p>(1) Serving as the strategic plan manager, ensuring that all work plans for Board-identified priority projects are fully implemented and funded;</p> <p>(2) Providing support, guidance and oversight to all Strategic Plan/COMPASS consultants, as well as the educational consultant;</p> <p>(3) Engaging CABE staff in actively supporting implementation of the Strategic Plan/COMPASS priorities and work plans;</p> <p>(4) Providing the Board with regular progress reports and analyses of Strategic Plan/COMPASS work plan implementation.</p>	<ul style="list-style-type: none"> <li>• Finalized the CABE Strategic Plan—2019-2024</li> <li>• Collaborated with Strategic Plan leads on the process for implementing the next stage of the CABE Strategic Plan—2019-2024.</li> <li>• Monitored the progress and growth of implementation of the CABE Strategic Plan.</li> <li>• Supported Family and Community Engagement through support of PFE (Parent and Family Engagement) (contracts, NPD Grant, CCF Grant in SIRS, marketing, growing the team, addressing and working on budget issues, etc.). Met with staff, addressed staffing needs. Supported the development and second year implementation of the NPD grant in Rialto and Fontana USD.</li> <li>• Participated in the leadership of the Statewide Community Engagement Initiative through a partnership with SBCSS, FIS, and CCEE. Attended many meetings internally and with partners to prepare for the launch of the CEI, year one planning, and final budget agreement.</li> <li>• Continued to support Strategic Plan for Professional learning directly through meeting with directors of Program and Events and PDS regularly supporting the work on the Professional Development Framework, the DLTA certification program, and collaboration and planning for the future with PDS. Major accomplishments include the Summer DLI Institute, Binational GLAD, Regional Conferences and PD events in Bakersfield Monterey and Sacramento, and Riverside and various presentations at conferences (La Cosecha, CLSBA, CSBA, ALI, ELLLI, CARLA, BCN, etc.)</li> <li>• Developed a Professional Learning Team comprised of several different CABE teams to consider organizational professional learning projects and issues, priorities, points of intersection and joint projects across team—PDS, DELIGHT and BEST. Deputy Director Cynthia Vasquez Petitt facilitates the group.</li> </ul>

- Implemented major aspects of the Sobrato grant targeted towards bilingual teacher pipeline, administrator leadership training and advocacy at the California Commission on Teacher Credentialing.
- Received second round of funding from Sobrato Family Foundation .
- Worked closely with Laurie Nesrala, Norma Rocha and ITCD team to advance the development and updates of the CAFE website added by elements of content and design—in Spanish and English: CAFE website, App, Resource Center, CAFE and 2019 website and Facebook page.
- Met and communicated regularly with consultant Claudia Lockwood to provide feedback, information, and support for the implementation of Multilingual Excellence (including ELLLI support, 2-Way Directory, indicators of exemplary multilingual programs, University Seal of Biliteracy, SEAL visits, Prop 58 implementation, and grant development)
- Met with Enrique Gonzalez regularly in person and via phone to deepen our work with Strategic Partnerships (via partnership with Mexico) and to plan the Binational Professional Development Project and partnerships with Mexico—IME, SEE, INEA—and to address priority areas during the administration transition in Mexico.
- Communicated regularly with Membership Team to continue use of Basecamp, Smart Reg Membership Database, chapter consolidation, and membership receptions).
- Met with Martha ZD regularly to support the development of the work plan for advocacy, to provide feedback on policy issues and attend meetings via telephone and in person regarding EL policy with CDE, SBE, and legislation. Legislative priorities for the 2019 legislative session included a bill on biliteracy—SB594 and one of the EL Roadmap—AB1012. SB 594 was not approved and AB 1012 was approved.
- Included information and reminders for CAFE Team members on the impact and relevance of the Strategic Plan on our daily tasks and rolls and responsibilities.

## GOAL AREA #2

### CABE LEADERSHIP

*Maintain and promote the CABE Essentials (values, vision/mission, theory of action, principles, strategic goals, and instructional priorities)*

### RESPONSIBILITIES & DUTIES

### CEO REPORT

- (1) Implementing and evaluating strategic and financial goals;
- (2) Engaging board, staff, and partners to support CABE vision and strategic plan;
- (3) Developing and maintaining strong fiscal structures to support the implementation of the CABE strategic plan.

- Met with SPI Tony Thurmond and Deputy Superintendent Lupita Cortez Alcala and CDE team on 9/17/19 with Martha ZD, Olivia Yahya and partners from Cal Tog.
- Represented CABE at the Sobrato Policy Partner meetings.
- Represented CABE at National Dual Language Forum via conference call
- Represented CABE at the National EL RoundTable via Zoom.
- Participated as member of Tony Thurmond Transition Team for Dual Language Learning.
- Met with Spanish Education Atache, Cristobal Guttierrez re partnership and involvement at CABE 2020.
- Met with Secretary of Education of Baja CA—Miguel Angel Mendoza.
- Asked to keynote at Minnesota MAINE Event—Dual Language Immersion Network—in October.
- Met with Barbara Flores in person and via phone as Director of Financial Affairs.
- Met with and facilitated the participation of Board members at CABE professional development events, conferences, and individual meetings.
- Collaborated successfully with Rosa Armstrong and Delma Chwilinski on international education experience in Peru in July. 12 people participated.
- Contacted and communicated via phone and text with incoming board members and provided orientation to new board members.
- Met with CDE staff on a variety of issues—CSA, BCN, CABE
- Continued collaborative partnership with Center for Applied Linguistics (CAL)
- Met with Finance & Executive Committees in November to discuss fiscal state and Board agenda.
- Met with CABE Accounting Consultant on a regular (weekly/daily) basis for budgetary and fiscal reports, yearly 2018-19 audit, and monitoring of CABE fiscal state.
- Met weekly and worked closely with Coordinating Council members on the programmatic and fiscal growth of CABE and how the development of our work that is directly correlated to the strategic plan.
- Emphasized the CABE Vision and Mission as our foundation on regular (daily/weekly basis) through all communication, social networking, promoting, branding, legislative action, etc.

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|  | <ul style="list-style-type: none"><li>• Met regularly with and supported Martha Zaragoza Diaz (Legislative Advocate) along with Californians Together on policy, CDE, and state board of education issues. Facilitated and supported several board members traveling to Sacramento to testify, observe and attend policy meetings.</li><li>• Provided an orientation day for new president, Oliva Yahya, in Sacramento, with Lobbyist Martha Zaragoza Diaz</li></ul> |
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# GOAL AREA #3

BUDGET AND FUND DEVELOPMENT	
RESPONSIBILITIES & DUTIES	CEO REPORT
<p>(1) Establishing budgets, budget strategy, and fund development goals for all Strategic Plan/ COMPASS priority projects, as well as for operational priorities;</p> <p>(2) Establishing a system of contract development, management, and monitoring;</p> <p>(3) Establishing a system of fund solicitation strategies;</p> <p>(4) Developing a portfolio of cultivation strategies (“making friends”);</p> <p>(5) Conducting an annual membership drive to increase membership;</p> <p>(6) Maintaining, monitoring, and evaluating the budgeting and fund development plan and process;</p> <p>(7) Raising funds for CABE’s operations from any and all sources, private and public;</p> <p>(8) Guiding staff and bringing about efficient fiscal operations and activities.</p>	<ul style="list-style-type: none"> <li>• Led the development of the CABE 2019-2020 budget of \$6.5 million. (for final Board consideration and approval on September 21, 2019).</li> <li>• Realized an estimated surplus of \$370,000 for 2018-19.</li> <li>• Created a proposal for surplus funds—investments and special projects.</li> <li>• Operationalization of the 2019-20 budget at \$6.5 million.</li> <li>• Received new two year grant from Sobrato Family Foundation for \$600,000</li> <li>• Met and surpassed the fourth quarter revenue goals for P &amp; E (4 regional conferences and the annual conference) P2i, and PDS, and summer DLI institute.</li> <li>• Communicated with Director of Finance and President regarding specific fiscal aspects.</li> <li>• Planned for and facilitated quarterly call with the Financial Committee in September</li> <li>• Review and approve weekly accounts payable payments through Bill.com.</li> <li>• Developed proposal with Accounting Consultant Yvette Chong Coontz for the investment and allocation of surplus cash to rebuild our reserve and to create financial stability for the organization.</li> <li>• Prepared for and met with auditors (in conjunction with Accounting Consultant) from Clifton Larson and Allen in September to initiate the audit.</li> <li>• Met with project officers from the California Endowment, and the Sobrato Foundation regarding projected funding, planning and renewal of grants.</li> <li>• Developed and implemented plans of action for the above grants from the Sobrato Family Foundation, USDOE NPD grant, California Endowment, and the CCEE.</li> <li>• Submitted reports for grants from Sobrato Family Foundation, The California Endowment, NPD, and IME.</li> <li>• Worked extensively with accounting consultant, business team and coordinating council to implement budget for 2019-2020 with fidelity.</li> <li>• Requested and supported coordinating council members meeting with Accountant Consultant on at least a monthly basis to review program budgets.</li> <li>• Monitored and supported the implementation of the system of contract development, management, and monitoring which is managed by our Administrative Systems Manager.</li> </ul>

<b>GOAL AREA #4</b>	<b>DESCRIPTION</b>
<b>BOARD ENGAGEMENT &amp; LEADERSHIP</b>	<i>Work collaboratively with the Board Executive Committee to design and roll out a Board engagement and leadership strategy for engaging CABA Board in effectively and compellingly understanding, communicating, and enacting the CABA Strategic Plan/COMPASS</i>
<b>RESPONSIBILITIES &amp; DUTIES</b>	<b>CEO REPORT</b>
<p>(1) Developing effective communication strategies;</p> <p>(2) Providing leadership to board members in implementing the CABA strategic plan;</p> <p>(3) Creating a project management process to contribute to and monitor the progress of the strategic plan.</p>	<ul style="list-style-type: none"> <li>• Planned and prepared June Board Meeting with President, President-Elect and Executive Committee.</li> <li>• Successfully implemented Board elections for 2019-20 board—incumbents and new candidates.</li> <li>• Planned and prepared for new Board Installation for June 2019.</li> <li>• Supported the development 2019-2020 schedule for Board member.</li> <li>• Met with Elodia Ortega-Lampkin, President, in person and via phone/email weekly regarding CABA programmatic, relational and growth areas.</li> <li>• Met with out-going Board member Ana Donovan to thank her for her service.</li> <li>• Attended events with President Elodia Ortega-Lampkin to promote CABA visibility and presence—Swearing in of Tony Thurmond, CALSA Focus on Results, Mexico City—meetings with IME, SEP, INEA and CONALITEG.</li> <li>• Met with leaders from Colorado CABA, DLeNM, Ed Trust West, Californians Together, CLSBA, and CDE leadership.</li> <li>• Met with CABA Board President and President Elect to plan for CABA 2019 and 2020</li> <li>• Met with Rosa Armstrong to finalize plans for Peru trip in July 2019.</li> <li>• Met with new SBE member Kim Pattillo Brownson with other educational partners.</li> <li>• Engaged CABA Board in the development and review of the CABA Vision, Mission and Theory of Action and the continuation of the renewal and revision of our strategic plan and prepared to present next level of planning at the December Board meeting.</li> <li>• Invited and confirmed Board members to attend and participate in Binational GLAD, Summer DLI Institute, Regional Conferences, Cal Tog quarterly meetings, CABA PD offerings.</li> <li>• Worked and coordinated with the Director of Legislative affairs and CABA Lobbyist on policy.</li> <li>• Met with Executive and Finance committees in preparation for June Board meeting.</li> <li>• Met with Audit Committee regarding the letter of engagement and preparation for the 2019-2020</li> <li>• Continued the implementation of Basecamp for communication and file sharing</li> <li>• Concurred regularly with Legal Counsel, Mary Hernandez, Aerobel Bañuelos, and Conor Kennedy, on several issues in relation to and impacting the board (contracts, plans, elections).</li> <li>• Continue to lead staff and board in refocusing on the goals and priorities of the CABA Compass.</li> </ul>

## GOAL AREA #5

<b>STAFF ENGAGEMENT &amp; LEADERSHIP</b>	<i>(Refer to Strategic Plan/COMPASS Action Plan 4.5)</i>
<b>RESPONSIBILITIES &amp; DUTIES</b>	<b>CEO REPORT</b>
<p>(1) Creating an office culture of quality service, support, leadership, and accountability;</p> <p>(2) Engaging all staff in the development of work teams and work plans tied directly to the CAFE strategic plan.</p> <p>(3) Intentionally seeking alignment across CAFE departments and teams to build CAFE's capacity for leadership, engagement, and accountability.</p> <p>(4) Establishing and utilizing an external committee or advisory board of experts, colleagues, and practitioners to provide input and feedback to staff and the Board regarding CAFE's developmental work.</p> <p>(5) Developing professional growth plans with staff to support their advancement and learning.</p>	<ul style="list-style-type: none"> <li>• Lead a CAFE team of 44 members-- 25 FT, 12 PT, and 6 Consultants.</li> <li>• Led/co-facilitated Staff Retreat in August 2019 with a continued focus on CONNECTING ACROSS THE Cs (Communication • Collaboration • Creativity • Critical Thinking • Consideration • Compassion) and planning for CAFE 2020.</li> <li>• Filled Acting Director for PDS for temporary position</li> <li>• Preparing for staff performance review process to occur in October 2019.</li> <li>• Renewed contracts for 6 consultants.</li> <li>• Addressed growth and performance needs with different staff members, terminated one position.</li> <li>• Supported the planning for celebrating the holidays and birthdays at CAFE HQ.</li> <li>• Met daily with Deputy Director for coordination, support, training and implementation.</li> <li>• Co-Facilitated Coordinating Council monthly meetings as group and individual members weekly or biweekly (with Deputy Director).</li> <li>• Met regularly with staff—whole staff meetings, coordinating council, teams, and individuals</li> <li>• Prioritize touching base and meeting personally with each staff member every week.</li> <li>• Sent weekly Monday Message to Team and regular consultants regarding cross team information, news and updates, and connection of work to the CAFE vision and Strategic plan.</li> <li>• Developed and fine-tuned process for interviews and hiring of new staff.</li> <li>• Worked regularly with Laurie Nesrala on the preparation of the 2020 Multilingual Educator. Membership support, and the CAFE Corner—our monthly E-newsletter</li> <li>• Worked closely with Strategic Plan Consultants on development of priority areas, goals and work plans for new strategic plan.</li> <li>• Coordinated with Gloria Inzunza Franco as consultant for annual conference workshops and presentations.</li> <li>• Engaged with staff on going regarding debriefing, planning and organization for CAFE 2020 and regional conferences.</li> <li>• Met with managers regarding the implementation of the CAFE 2018-19 budget and programmatic goals and priorities and the preparation of the 2019-2020 preliminary budget.</li> <li>• Continued to encourage and guide team collaboration, planning and growth.</li> </ul>

- Regularly engaged team in discussions regarding leadership during coordination council and implementing new structure and focus to Coordinating Council meetings.
- Continue to encourage and build staff level of professionalism, growth, and cross team connections.
- Offered in person and online computer trainings to all staff.
- Met with close CAFE partners for input and feedback on CAFE programs and offerings.
- Support systemic growth and use of technology throughout staff to improve services—attending off site trainings, supporting implementation of new CAFE Email—gocafe.org, upgrading software, hardware, trainings on different software, ransom-virus, etc.
- Celebrated birthdays, holidays, graduations and special events and honored losses.
- Provided encouragement and recognition to staff for their dedicated efforts by celebrating birthdays, providing Starbucks run, lunch at staff meetings, and regular treats.
- Focused with team on creating systemic and organized flows to work projects to enhance professionalism and efficiently in work.
- Met with key partners, experts and colleagues to ask for insight and feedback on CAFE's growth and future development work.



<b>GOAL AREA #6</b>	
<b>OPERATIONAL LEADERSHIP</b>	<i>Manage the operation and administration of the CAFE organization to ensure CAFE's organizational, programmatic, and fiscal success and sustainability.</i>
<b>RESPONSIBILITIES &amp; DUTIES</b>	<b>CEO REPORT</b>
<ul style="list-style-type: none"> <li>• Providing strong leadership and professional model for staff;</li> <li>• Assuring sound financial and human resources policies.</li> <li>• Developing and maintaining strong relationships with partner organizations.</li> </ul>	<ul style="list-style-type: none"> <li>• Plan for CAFE 2020—invitation of Honorary Chairs, Co Chairs, planning committee meeting artwork and theme, workshops, speakers, sponsors, special events.</li> <li>• Focused on addressing, building awareness &amp; development of the new CAFE Strategic Plan.</li> <li>• Met with contractor and architect to begin work on building improvements (large conference room/office space, patio, and other misc areas.) and to plan for improvements to be completed in August 2019.</li> <li>• Collaborated with Manager of IT/CD for Exterior Signage for CAFE.</li> <li>• Submitted plans and permit requests to City of Walnut for building improvements—approved.</li> <li>• Supported Administrative Systems Manager regarding building repairs and improvements, membership issues, and HR processes.</li> <li>• Continued to support and collaborate on a daily (sometimes hourly!) basis with Deputy Director, Cynthia Vasquez Pettit.</li> <li>• Supported CABTE as organizational affiliate and Ivannia Soto as ex-officio board member to CABTE. CAFE is taking the lead with CABTE on advocacy with CCTE.</li> <li>• Supported the development of Project BEST and leadership of Ivanna Soto with the Sobrato grant and inaugurated the BEST Administration Leadership Series for dual language immersion.</li> <li>• Prioritized the structure for regular meetings of team member involved in delivery of professional development content to build connections and support systems for the content and curriculum we provide—facilitated by Deputy Director.</li> <li>• Continually and regularly spoke about and share the CAFE vision and mission with partners, clients and staff—Unidos US, CAFE 2020 Planning Committee, Cal Tog, ELPLN, ELLLI, CARECEN, CALSA, CLSBA, DLeNM, CSBA, ACSA, PTA. CTA, CAL, CDE, National EL Round Table, NABE, EdTrust West, Advancement Project, CCTC, NDLF, etc.</li> <li>• Communicated with SPI Tony Thurmond's team on participation in Transition Team and participation CAFE Binational Project and CAFE 2020.</li> </ul>

- Maintained International Relationships with IME & SRE, Spanish Embassy and Consulate, and Confucius Institutes.
- Communicated regularly with staff through all modes of dialogue and communication.
- Continued to support the full implementation of the Telepayroll and Bill.com system
- Used and promoted social media to support CABE events, ideas and resources—recently surpassed 7072 likes on FB.
- Continued to develop systems and protocols for efficient and smooth office operations.

**TRAVEL**

**Travel Conducted for April -June**

- **Sacramento**-- SBE, CDE, Leg.,
- **San Francisco**—CABE 2020
- San Diego-CALSA
- **Peru**—CABE Trip
- **Washington DC**—National EL Roundtable
- **Mexico City & Tijuana**—Binational Project

**Forecasted Travel for September -December 2019**

- **Sacramento**—CDE, SBE, BCN, CCEE, Systems of Support
- **Tijuana**—Binational GLAD
- **Minneapolis**—Keynote at MAIN Dual Language Immersion Event.
- **Oxnard**: BEST
- **Oakland**: Sobrato Policy Partners
- **SF**: CABE 2020 PC
- **San Diego**: Binational GLAD
- **Monterey & Bakersfield**: Regional Conferences

Please note I will be on vacation from September 24-October 7 and will be traveling internationally.