

<b>GOAL AREA #1</b>	
<b>STRATEGIC PLAN IMPLEMENTATION</b>	<i>Lead implementation of the CABE Strategic Plan/COMPASS:</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>• Led Staff Retreat in October that focused on the understanding, deeper connections and implementation of the Strategic Plan (and priority areas--2.2, 2.3, 3.1, 3.3, 3.4, 3.5, 4.1, 4.2, 4.6) along with team relational building.</li> <li>• Presented two workshops at regional conferences with Stanley Lucero and Rosa Armstrong on the CABE vision, strategic plan, and opportunities for connecting to CABE.</li> <li>• Supported 3.1 Family and Community Engagement through support of P2I (i3 grant, contracts, marketing, growing the team, addressing and working on budget issues, etc.). Met with staff, addressed staffing issue and needs, engaged P2I staff in other events</li> <li>• Continued to support Strategic Plan 2.2 and 2.3 directly through supporting the work on the Professional Development Framework and collaboration and planning for the future with PDS and planning for 2015-16 and 2016-17 conference/professional development offerings</li> <li>• Continued to build on Strategic Plan priority areas 2.3, 3.5, 3.3, 4.1, 4.2—through supporting three strategic plan consultants and part time staff—Multilingual Excellence, Membership, Data Dashboard, Strategic Partnerships, and Design for Success Website.</li> <li>• Worked closely with team members to advance the creation of the Design For Success website</li> <li>• Worked with Strategic Plan Priority Leads to update workplans for November 2015</li> <li>• Met and communicated regularly with consultant Claudia Lockwood to provide feedback, information, and support for the implementation of 4.1 (including on 2-Way Directory, indicators of exemplary multilingual programs, University Seal of Biliteracy, SEAL visits, etc.)</li> <li>• Met with Enrique Gonzalez regularly in person and via phone to deepen our work with Strategic Partnerships (via partnership with Mexico, identification of corporate sponsors, educational organizations, etc.)</li> <li>• Communicated regularly with Membership consultant (Stanley Lucero) to institute Basecamp, Smart Reg Membership Database, chapter consolidation, and membership receptions</li> <li>• Had work plans posted to our Board Webpage for easy access by Board members.</li> </ul>

## 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.

- Created and led specific activities at the Staff Retreat that focused on the understanding, deeper connections and implementation of the CABE Essentials as well as other areas of the strategic plan.
- Met with Finance and Executive Committees in November to discuss and support issues and requests and move forward with the implementation of the CABE Strategic Plan
- Met with Investment Advisor from Morgan Stanley
- Met with Realtor and created process for board and staff to begin discussion on the effectiveness and location of our building and sought support from a realtor to support our beginning discussion and planning.
- Planned for meetings to create a plan for the future implementation and sustenance of the Project 2 INSPIRE program after the I3 grant ends in 2017
- Met and worked closely with PDS Director on the programmatic and fiscal growth of CABE PDS and the development of the PD Framework that is directly correlated to the strategic plan and the CABE Essentials.
- Supported the preparation and implementation of the 2014-15 audit.
- Continued to support and work on the publication of the 2016 Multilingual Educator with CABE Education Consultant
- Submitted name and organization to be part of the Lara Multilingual EdGE campaign committee
- Worked with legislative advocate to ensure that Lara Campaign representative attend the CABE November board meeting to provide an update.
- Continued to work closely with CABE Accounting Consultant, Yvette Chong-Coontz to ensure that funding structures are in place in the 2015-16 budget to support the implementation and growth of the strategic plan—specifically re CABE PDS and department budgets.
- Emphasized the CABE Vision and Essentials as our foundation on regular (daily/weekly basis) through all communication, social networking, promoting, branding, legislative action, etc.
- Met regularly with and supported Martha Zaragoza Diaz (Legislative Advocate) along with Californians Together Partner Shelly Spiegel-Coleman on policy, CDE, and state board of education issues.
- Attended the steering group meetings of the English Learner Leadership and Legacy group.
- Provided weekly information and orientation to the CABE Compass to staff through the Monday Message and in staff meetings as well as at the staff retreat.

## GOAL AREA #3

<b>BUDGET AND FUND DEVELOPMENT</b>	<i>(REFER TO COMPASS ACTION PLAN 4.6)</i>
<b>RESPONSIBILITIES &amp; DUTIES</b>	<b>CEO REPORT</b>
<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>• Worked extensively with accounting consultant, business team and coordinating council to implement budget for 2015-16 with fidelity.</li> <li>• Supported and communicated with accounting consultant and business team on the 2014-15 audit, which began in early November</li> <li>• Worked extensively with managing accounting consultant and coordinating council members on 2015-16 final budget</li> <li>• Invited managing accounting consultant to attend the Coordinating Council meeting to discuss and review the 2015-16 budget and to set processes to monitor budget and budget goals in all areas and with all teams.</li> <li>• Reached the \$1,000,000 reserve goal for CABE and began to meet with investment advisors regarding developing a new investment plan and policy.</li> <li>• Meet weekly in person with accounting consultant and business team members.</li> <li>• Worked closely with Consultant for Strategic Partnerships to create a short, medium and long term plan for corporate relationship and sponsorships</li> <li>• Extended the CABE sponsorship plan to offer features to confirmed text book publishers</li> <li>• Worked closely with PDS and new PDS director on securing contracts and developing consultant team, funding, and processes</li> <li>• Worked with Laurie Olsen and the SEAL program to submit a proposal to the Sobrato Family Fund for Policy and Programmatic Support</li> <li>• Submitted a grant proposal to IME Becas to support and grow the Plaza Comunitaria program locally and statewide</li> <li>• Monitored and supported the development of the system of contract development, management, and monitoring which is managed by our Administrative Systems Manager</li> <li>• Planned for and facilitated quarterly call with the Financial Committee.</li> <li>• Continued working with Shelly Spiegel-Coleman and part time consultant, Felipe Agredano, to develop the work of Project ABLE.</li> <li>• Oversaw a substantial increase in registration and attendance at CABE annual and regional conferences</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>• Communicated regularly via phone, text, social media, email, and in person with all board members.</li> <li>• Met regularly with President Karling Aguilera Fort via phone and in person</li> <li>• Met with board president via phone regarding board meeting, CABA Compass, budget for 2015-15, CABA Compass Work Plans, CABA 2016 plans, and focus areas for 2015-2016</li> <li>• Established extended contract with Talia Eisen to provide follow up and coaching on CFO Evaluation. (have so far conducted one phone meeting, several email exchanges and planned for future meetings)</li> <li>• Traveled to Washington DC with President Karling Aguilera Fort to participate in meetings with OELA, the National EL Roundtable, and the White House Initiative on Educational Excellence for Hispanics</li> <li>• Arranged for President Aguilera Fort to speak at the Senate Education Committee Hearing on EL best practices on December 1 with direct support from CABA Legislative Advocate</li> <li>• Continued the implementation of Basecamp, a project management software to be expanded to be used for membership, the strategic plan consultants, and potentially with membership.</li> <li>• Concurred regularly with Legal Counsel, Mary Hernandez, on several issues in relation to and impacting the board (contracts, plans).</li> <li>• Continue to lead staff in refocusing on the goals and priorities of the CABA Compass</li> <li>• Exploring video conference program (Web X, etc.) to be used by board members and other partners to enhance CABA communication.</li> </ul>

## GOAL AREA #5

### STAFF ENGAGEMENT & LEADERSHIP.

*(Refer to Strategic Plan/COMPASS Action Plan 4.5)*

### RESPONSIBILITIES & DUTIES

### CEO REPORT

- (1) Creating an office culture of quality service, support, leadership, and accountability;
- (2) Engaging all staff in the development of work teams and work plans tied directly to the CAFE strategic plan.
- (3) Intentionally seeking alignment across CAFE departments and teams to build CAFE's capacity for leadership, engagement, and accountability.
- (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.
- (5) Developing professional growth plans with staff to support their advancement and learning.

- Conducted 2-day Staff Retreat in San Francisco in October
- Developed and implemented new staff evaluation process
- Supported the implementation of new Telepayroll on line program that provides online access to staff for payroll and human resource information.
- Worked with the IT team and Executive Assistant to augment the Staff Web Page with different resources, forms and information for staff.
- Presented staff professional development and continuing education initiative to encourage staff to grow and develop new skills
- Meet regularly with staff—whole staff meetings, coordinating council, teams, and individuals.
- 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.
- Recognized staff for the number of years served and accomplishments at CAFE
- Prioritize touching base and meeting personally with each staff member every 1-2 weeks.
- Continued to encourage and guide team collaboration, planning and growth
- Regularly engaged team in discussions regarding leadership during coordination council
- Continue to encourage and build staff level of professionalism, growth, and cross team connections.
- Supported systemic growth and use of technology throughout staff to improve services
- Celebrated birthdays and special events
- Met with staff in monthly staff meeting and with coordinating council twice per month
- Addressed growth and performance needs with different staff members
- Focus with team on creating systemic and organized flows to work projects to enhance professionalism and efficiently in work
- Welcomed new staff members Karmina Ramirez and Roxanna Espinoza

## GOAL AREA #6

<p><b>OPERATIONAL LEADERSHIP</b></p>	<p><i>Manage the operation and administration of the CAFE organization to ensure CAFE's organizational, programmatic, and fiscal success and sustainability.</i></p>
<p><b>RESPONSIBILITIES &amp; DUTIES</b></p>	<p><b>CEO REPORT</b></p>
<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>• Conducted and analyzed staff evaluation of Staff Retreat to monitor and provide direction for continued steam growth.</li> <li>• Supported the implementation of the Telepayroll system</li> <li>• Provided direction, input and support to the planning of the CAFE 2016 conference –location, contracts, speakers, structures, brochures—Sponsor/Exhibitor, Awards and registration</li> <li>• Continually and regularly spoke about and share the CAFE vision and mission with partners, clients and staff—OELA, NCLR, CAFE 2015Planning Committee, Cal Tog, CALSA, CLSBA, DLeNM, CSBA, ACSA, PTA..</li> <li>• Communicated regularly with staff through all modes of dialogue.</li> <li>• Hired PDS Administrative and Marketing Assistant and Web Design Position</li> <li>• Continuing to work with Consultant Enrique Gonzalez to finalize MOUs with the SEE in California and IME/INEA in Mexico City</li> <li>• Used and promoted social media to support CAFE events, ideas and resources—recently surpassed 3872 likes—increase of 172 since September!</li> <li>• Continue to develop systems and protocols for efficient and smooth office operations..</li> <li>• Focused on addressing, building awareness &amp; implementing the CAFE Compass</li> <li>• Participated in LCAP reading and evaluation day sponsored by Cal Tog</li> <li>• Conference calls with other organizations regarding LCAP Evaluation Metrics and the reauthorization of ESEA</li> <li>• Met with leadership from the 2Way Afflilate and scheduled regular meetings to support our collaboration with and growth of the affiliate.</li> <li>• Had CAFE Representation at the fall CABTE meeting (PDS Director) to support the CABTE affiliate and form a stronger partnership.</li> <li>• Met/communicated with partners—NCLR, CALSA, NABE, CLSBA, Cal Tog, 2Way CAFE, CARECEN, CAFE 2015 Planning Committee Districts, Dual Language Education New Mexico, CDE, OELA, ACSA, CSBA, CLSBA,</li> <li>• Met regularly with Velazquez Press, Lettie Ramirez and CAFE Team members on CAFE book written by parents and to support process towards publication.</li> </ul>

- Initiated meeting with Families In Schools

**Travel Conducted:**

- Sacramento—Water Cooler, Region 1 Conference
- San Jose and Redwood City—CABE 2016 PC,
- Washington CD—EL Roundtable, OELA  
WHIEEHA

**Forecasted Travel for November 2025-March 2016**

- San Francisco—CABE 2016 planning
- Chicago—NABE
- Los Angeles—CDE Accountability Institute
- Sacramento—SBE, California Summit on Global Education
- Washington DC—EL Roundtable