

August 5, 2011

Dear ABC Board of Directors,

I continue to feel honored by the confidence you have in me to lead this great organization. I want to personally thank you for your interest and dedication to the work of ABC.

Consistent with our Strategic Plan and best practices identified by the Sherwood Trust scope of operating procedures, I am requesting a board review of my accomplishments as they relate to my annual review. I value your feedback and look forward to setting new goals for 2012 that will allow us to continue the great work we get to do every day.

I have included a detailed summary of accomplishments associated with the goals that were established last year. All business strategies for 2010 and 2011 have been achieved as identified in our strategic plan that we have been following.

### **Community Relations and Advocacy**

- Secured and conducted additional public speaking engagements discussing ABC, including: Exchange Club, Rotary Club, Dayton County Commissioners, etc.
- Greatly expanded the community awareness of our goal by convening discussion groups at throughout the community.
- Built favorable relationships through meetings or ongoing communications with peers and/or potential partners, e.g., Sherwood Trust, Blue Mountain Community Foundation, WW County, City of WW, potential partner agencies as identified (including those in the Tri-Cities), etc.
- Participated in Leadership Walla Walla and Ford Institute for Community Building Leadership Development
- Attended 5 of 6 NonProfit Learning Center workshops, bringing all materials back to BoD and sharing learnings as applicable to ABC
- Completed quarterly ABC newsletter of events and services, sharing with funders, partners and other key stakeholders
- Distributed press releases, as needed, to continue to educate the community about our work

### **Infrastructure and Organizational Management**

- Scheduled and oversaw 7 staff members and volunteers
- Oversaw website design to ensure fit with brand
- Ensured development and implementation of Policies and Procedures manual
- Provided HR oversight such that the organization is in compliance based on appropriate revisions with all workplace/employment laws
- Completed all FY 2009 and FY 2010 high priority projects on schedule, under budget, with all deliverables met

- Planned and prepared for monthly board of directors meetings. Plan for and schedule guest speakers
- Planned for and conducted required training sessions for staff

### **Fiscal Management, Fundraising and Resource Development**

- Developed and submitted sound fiscal budget and needed controls for the operation of business, ensuring that budget is realistic and maximized use of resources
- Ensured tracking and payroll for staff and contactors, including taxes and liabilities
- Pursued, wrote and successfully obtained grants and funding from (10 sources) supporting programs, building improvements and general operating expenses. Total funding exceeded budget by 21%
- Conducted surveys for customer satisfaction reports; completed required reports based on the data received
- Ensured audit and monthly financials were, and are, currently reflecting aggressive financial stability based on the acquisition of new contracts
- Maintained over 86% of existing contracts through a down economy enabling continuity of existing programs with no negative impact.

### **Strategic Leadership and Planning**

- Kicked off strategic process with board on time to develop 4 year plan; hired and managed consultant to facilitate process
- Wrote and successfully obtained grant from Sherwood Trust allowing ABC to develop a much needed strategic plan and review of current governance and current operations
- Wrote and successfully completed the deliverables for a Washington State grant regarding X

### **Open Items/Issues:**

- Business processes for budgeting and forecasting have improved; need to shorten time frame and provide more direction
- This was a challenging year with several issues outside of my control, e.g., two board resignations and loss of one key staff with no replacement
- More time is needed providing feedback to staff
- I need to work on my time management, e.g., missing the deadline for the X grant. While a small dollar amount (\$2500), it would have meant unrestricted funds
- We exceeded budget in 2 key areas that were not planned for and will need to develop a plan to replace reserves used to offset that