Michelle’s To Do List

Weekly

|  |  |
| --- | --- |
| Exec Staff (Mon 9am) | Staff (Mon 2:30pm) |
| Travel policy Performance Review samples  Consider new website header |  |

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| --- | --- |
| Meeting with Chris | Steering Committee |
|  | Financials  ??David – board list??? |

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| --- | --- | --- | --- |
| Pro 501(c)(3) | | Pro Fund | |
| Corporate credit card  Family benefits (cover partial) | Salesforce – 10 free accts  Complete payroll info  Canva – free accounts  Generate offer letters | Tax reporting  HR support  Payroll services  Insurance | Board structure  Great 401K match  No state charity registration |

Communications/Website

New staff bio/pics – Candace

501 Technet

Updates needed:, QB, Java

Another computer??

OKC computer (+ extra doc, monitors, keyboard/mouse)

Ask Shelby to add new employees to Katie’s HFO group

Salesforce

Email integration for new staff (Candace)

Enter Org info

Add source of contact

Add delete this contact button

Add mailing list options

Make list custom view available for all staff

Update Chris’s salesforce settings

Consider: duplicate meetings, relationship to group

Finance

Staff appreciation (maybe just appreciation??)

Procurement form

EOY financials – print for CB

Enter budgets into QB

Development

Current Grants and start dates

AHZF – Jan 1

MHF – Sept 1

CLSFF – August 1

GKFF – October 1

IAM – November 1

BR – July 1

GLF – LOI submitted

Need from TCF

501c3 IRS letter

Lost receipt/no receipt (parking, tolls)

Summary financials

Payroll report

Other

Style Guide – web/communications

When is Judy’s birthday?

Join HR group: SHRM Tulsa

Create change of salary form, no receipt form, office supply request, purchasing form

Organize keys

Create a new email address for hunger free communities

Explore google analytics – esp acquisition, referrals, behavior

Call Java Daves 918-836-5570

Bill tracking – OPI uses eCapitol

Things to Remember

Chris @ TAPC interested in WIC

Autumn is on board of New Hope – interested in CACFP info

Cost of online version of Oklahoman ($9.99/mo), Tulsa World ($3.95/mo), Journal Record ($189/yr) (OKCNP discount)

Policies and Procedures:

Financial (review and edit)

Board

Travel (rental car, fly/drive, price comp. hotels - .5mi, no rental cars @ conferences EXEC STAFF MTG

Hiring policies/procedures

Draft performance review

Meet with Chris

Fundraising/sustainability plan

Outline what success looks like for OM

Forecasting (through QB?)

Longer Term Projects

Conduct target research (with CB)

Work with CB to turn NCG products into useful guide for HFO and track progress

Identify operational challenges, needs, and propose changes to operations

Track and maintain performance metrics: Program (with RC); Operations (with CB); Policy (with CB)

Building

SC: Signage, Suite Committee, HDMI cord for conference room

Nicks in walls

Office Supplies needed

Ink Cartridges (1/25):

Black 50% (replaced 12/11/17)-have spare

Cyan 70% (replaced 12/11/17)- have spare

Magenta 90% (replaced 1/12/18) – have spare

Yellow 100% (replaced 1/22/18) – have spare

Coffee last ordered 11/1 – 1/2/18

Wish list: High capacity stapler