

FY '23 TIMELINE - MONTHLY FOCUS AREAS:

	STAFF	BOARD
JULY	<ul style="list-style-type: none"> Client Surveys Annual Report United Way Year End Reports (TLP & COP Assessments included) Continue meetings with COCMHC & GMH leadership to discuss coordination of services/referrals/partnerships – have Business Agreements signed Explore new Donor Tracking Tool 	<ul style="list-style-type: none"> Annual Board meeting Election of Officers
AUGUST	<ul style="list-style-type: none"> Annual Report United Way campaign Prep work for TH Audit TH GiveSmartOKC updates Begin OU student practicum/internship connection process Connect with incoming TH Board Fellow Prep for ARPA funding opportunity Begin developing additional Foundation and other funding connections Final Draft Review of new Employee Handbook Update Staff Job Descriptions 	<ul style="list-style-type: none"> Board recruitment Executive Director's evaluation Executive Committee work on developing FY'23 Board Committees Begin developing additional Foundation and other funding connections
SEPTEMBER	<ul style="list-style-type: none"> Apply for ARPA funding Continue work on relationships with Foundations – possibly prep for new Foundation applications Day of Caring Explore Case Management training for Recovery Coordinators Work with OU Board fellow to review and update TH GuideStar Work with Board on direction for JBJ production 	<ul style="list-style-type: none"> Board will receive FY'23 Goals from Staff – further develop into a Strategic Plan Plan Agency Retreat Donor Drive Committee begins meeting JBJ Sponsorship Drive Committee begins meeting Begin work on JBJ production
OCTOBER	<ul style="list-style-type: none"> UWN Site visit Beginning of Holidays with Halloween Party Continue Policy reviews and updates 	<ul style="list-style-type: none"> Make preliminary contacts with prospective sponsors Finalize plans for the Agency retreat
NOVEMBER	<ul style="list-style-type: none"> Deadline for TH audit completion and distribution Thanksgiving Celebration 	<ul style="list-style-type: none"> Have list of Donor Drive prospects prepared Agency Retreat (possibly early November)
DECEMBER	<ul style="list-style-type: none"> Client Holiday shopping Holiday Party/Open House Meet with Staff to plan for upcoming funding requests 	<ul style="list-style-type: none"> Kick off Donor Drive Holiday Party/Open House
JANUARY	<ul style="list-style-type: none"> United Way LOI's Mid-Year UW Reports (TLP & COP Assessments included) Continue focus on JBJ work with Board 	<ul style="list-style-type: none"> Begin JBJ planning <ul style="list-style-type: none"> JBJ Sponsor Drive kick off JBJ Public Relations work begins JBJ t-shirt work begins
FEBRUARY	<ul style="list-style-type: none"> Grants/RFP's: UW; DMHSAS Renew SOS Charitable Non-Profit Certificate 	<ul style="list-style-type: none"> Be actively seeking JBJ sponsors
MARCH	<ul style="list-style-type: none"> Finalize grants/RFP's 	<ul style="list-style-type: none"> Finalize JBJ theme and direction for production
APRIL	<ul style="list-style-type: none"> JBJ prep Grant presentations 	<ul style="list-style-type: none"> JBJ promotion work, ticket and t-shirt sales
MAY	<ul style="list-style-type: none"> JBJ prep Begin Client Survey process SVSC grant 	<ul style="list-style-type: none"> Nominating Committee begins to meet to prepare for July Annual meeting Final prep for JBJ Finance Committee meeting to help prep next fiscal year budget
JUNE	<ul style="list-style-type: none"> June Bug Jam Staff Evaluations OEC grant 	<ul style="list-style-type: none"> June Bug Jam Executive Director's evaluation