

FY '24 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 	<ul style="list-style-type: none"> Executive Director's evaluation
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 Apply for TigerPalooza opportunity Begin Clinical Policies and Procedures updates 	<ul style="list-style-type: none"> Board recruitment Executive Committee work on developing FY'24 Board Committees Begin preliminary decisions regarding JBJ'24 Secure JBJ'24 venue
SEPTEMBER	<ul style="list-style-type: none"> Day of Caring Explore Case Management training for Recovery Coordinators Work with OU Board fellow to assist with Bloomerang Work with Board on direction for JBJ production 	<ul style="list-style-type: none"> Board will receive FY'24 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 Clinical Policy & Procedures work 	<ul style="list-style-type: none"> Make preliminary contacts with prospective sponsors Conduct Agency retreat later in October/early November
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
DECEMBER	<ul style="list-style-type: none"> Client Holiday shopping Holiday Party/Open House 	<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 and t-shirts Governance Committee begins to meet to prepare for July Annual meeting
MAY	<ul style="list-style-type: none"> JBJ prep Begin Client Survey process SVSC grant 	<ul style="list-style-type: none"> 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 Annual Board meeting Election of Officers