

FY 2010-2011 Workplan for Louisa Lakos, Operations & Development Coordinator

Program	Core Tasks	July 1- Sept 30	Oct 1- Dec 31	Jan 1- Mar 31	April 1- June 30
<p><b>Neighborhood Support</b></p>	<p>* NA Support Team Mtgs. (3<sup>rd</sup> Wed of each month): Discuss successes &amp; what's working with each NA, strategize ways to respond to issues &amp; provide support to improve NA health</p> <p>* Provide support and information on needed basis</p> <p>* Update NA's at board and general meetings when appropriate</p> <p>* Attend NA events when invited</p> <p>* Maintain an up-to-date Board list: Contact Info. &amp; Position</p> <p>* Update the calendar and front page with Neighborhood Meeting Times/ Board Positions on web</p> <p>* Foster relationship with SE Uplift NA representative - collaborate on all updates, issues, info needing to be shared</p>	<p><u>Monthly:</u></p> <p>* Assist with development of monthly email</p> <p>* Attend NA meeting for both Brentwood-Darlington and Montavilla NA's</p> <p>* Update ONI Calendar</p> <p>* File hard copy and electronic copy of monthly meeting sign-in sheet and approved minutes</p> <p><u>Quarterly:</u></p> <p>* Help manage updates for the ONI Directory &amp; Report</p> <p>* Share new policy on Fiscal Sponsorship opportunity - who can use our tax id</p> <p><u>August:</u></p> <p>* SMILE Sunday in the park – 1<sup>st</sup></p> <p>* NNO Events – 3<sup>rd</sup></p> <p><u>September:</u></p> <p>* Neighborhood Social</p> <p>* Neighborhood Small Grant Info Session</p> <p>* Citywide Board Training – 23<sup>rd</sup></p>	<p><u>Monthly:</u></p> <p>* Assist with development of monthly email</p> <p>* Attend NA meeting for both Brentwood-Darlington and Montavilla NA's</p> <p>* Update ONI Calendar</p> <p>* File hard copy and electronic copy of monthly meeting sign-in sheet and approved minutes</p> <p><u>Quarterly:</u></p> <p>* Help manage updates for the ONI Directory &amp; Report</p> <p>* Assist NA's with filling out Communications \$ form</p> <p><u>October:</u></p> <p>* Assist Montavilla NA with elections &amp; collect new board contact info</p> <p>* Assist Kristen with assessment of NA's and determine priorities for the year</p> <p><u>November:</u></p> <p>* Assist Brentwood-Darlington with DOJ filing</p> <p>* Neighborhood Small Grant Meeting Deadline – 1<sup>st</sup></p> <p><u>December:</u></p> <p>* Neighborhood Social</p>	<p><u>Monthly:</u></p> <p>* Assist with development of monthly email</p> <p>* Attend NA meeting for both Brentwood-Darlington and Montavilla NA's</p> <p>* Update ONI Calendar</p> <p>* File hard copy and electronic copy of monthly meeting sign-in sheet and approved minutes</p> <p><u>Quarterly:</u></p> <p>* Help manage updates for the ONI Directory &amp; Report</p> <p>* Share new policy on Fiscal Sponsorship opportunity - who can use our tax id</p> <p><u>January:</u></p> <p>* Neighborhood Small Grant Party</p> <p><u>February:</u></p> <p>* Neighborhood Social</p>	<p><u>Monthly:</u></p> <p>* Assist with development of monthly email</p> <p>* Attend NA meeting for both Brentwood-Darlington and Montavilla NA's</p> <p>* Update ONI Calendar</p> <p>* File hard copy and electronic copy of monthly meeting sign-in sheet and approved minutes</p> <p><u>Quarterly:</u></p> <p>* Help manage updates for the ONI Directory &amp; Report</p> <p><u>April:</u></p> <p>* Assist Brentwood-Darlington with SOS filing</p> <p><u>May:</u></p> <p>* Assist Montavilla with DOJ filing</p> <p>* Neighborhood Social – Montavilla Louisa lead</p> <p><u>June:</u></p> <p>* Assist Brentwood – Darlington with elections &amp; new board contact info</p> <p>* Assist Montavilla with SOS filing</p>

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<p><b>Board of Directors Support</b></p>	<p><u>Update:</u>                      * Board Roster                      * Tent Name Cards                      * Sign-In Sheet                      * Web-site                      * Board Binder Materials</p> <p><u>Committees:</u>                      * Strategic Direction                      * Finance                      - participate in drafting of documents, new policy</p> <p>* Work on editing and updating entire Board Binder</p>	<p><u>Monthly:</u>                      * Prepare and Distribute Board Packet</p> <p>* Set-up FSR Room for meeting: snacks, dishes, copies, tent signs, sign-in sheet</p> <p>* Post meeting agenda on SE Uplift web page</p> <p>* Place sign-in sheet, board packet, extra handouts in board binder in file room</p> <p>* Post approved meeting minutes on SE Uplift web page</p> <p>* Attend board mtg</p> <p><u>Quarterly:</u>                      * Board Orientation Meeting – Sept. 23<sup>rd</sup></p>	<p><u>Monthly:</u>                      * Prepare and Distribute Board Packet</p> <p>* Set-up FSR Room for meeting: snacks, dishes, copies, tent signs, sign-in sheet</p> <p>* Post meeting agenda on SE Uplift web page</p> <p>* Place sign-in sheet, board packet, extra handouts in board binder in file room</p> <p>* Post approved meeting minutes on SE Uplift web page</p> <p>* Attend board mtg</p> <p><u>Quarterly:</u>                      * Assist with the planning and set up of Board Retreat</p>	<p><u>Monthly:</u>                      * Prepare and Distribute Board Packet</p> <p>* Set-up FSR Room for meeting: snacks, dishes, copies, tent signs, sign-in sheet</p> <p>* Post meeting agenda on SE Uplift web page</p> <p>* Place sign-in sheet, board packet, extra handouts in board binder in file room</p> <p>* Post approved meeting minutes on SE Uplift web page</p> <p>* Attend board mtg</p>	<p><u>Monthly:</u>                      * Prepare and Distribute Board Packet</p> <p>* Set-up FSR Room for meeting: snacks, dishes, copies, tent signs, sign-in sheet</p> <p>* Post meeting agenda on SE Uplift web page</p> <p>* Place sign-in sheet, board packet, extra handouts in board binder in file room</p> <p>* Post approved meeting minutes on SE Uplift web page</p> <p>* Attend board mtg</p> <p><u>Quarterly:</u>                      * Assist with the planning and set up of Board Retreat</p>

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<p><b>Tenant Relations &amp; Meeting Room Reservations</b></p>	<p><b>* Pursue relationships with community organizations and individuals to boost occupancy and rentals</b></p> <p>* Maintain Legal Lease Agreement with Floor Plans &amp; Conference Space Regulations</p> <p>* Advertise office space when available</p> <p><u>Tenants:</u> * Maintain up-to-date lease agreements and copy of their insurance policy documents</p> <p>* Assist tenants with any facility or administrative issues</p> <p>* Issue and track key fob users and access times</p> <p><u>FSR/Conference Space:</u> * Maintain up-to-date usage contracts</p> <p>* Issue and track key fob users and access times</p> <p>* Assist renters with any facility issues</p>	<p><u>Monthly:</u> * Track tenant rent payments</p> <p>* Send out late payment notice if needed</p> <p>* Collect &amp; track FSR/Conference Space rental payments and key deposits</p> <p>* Maintain FSR calendar</p> <p>* Set-up FSR room appropriately to specifics of user need</p> <p><u>Quarterly:</u> * Invoice for copier usage when applicable</p>	<p><u>Monthly:</u> * Track tenant rent payments</p> <p>* Send out late payment notice if needed</p> <p>* Collect &amp; track FSR/Conference Space rental payments and key deposits</p> <p>* Maintain FSR calendar</p> <p>* Set-up FSR room appropriately to specifics of user need</p> <p><u>Quarterly:</u> * Invoice for copier usage when applicable</p>	<p><u>Monthly:</u> * Track tenant rent payments</p> <p>* Send out late payment notice if needed</p> <p>* Collect &amp; track FSR/Conference Space rental payments and key deposits</p> <p>* Maintain FSR calendar</p> <p>* Set-up FSR room appropriately to specifics of user need</p> <p><u>Quarterly:</u> * Invoice for copier usage when applicable</p>	<p><u>Monthly:</u> * Track tenant rent payments</p> <p>* Send out late payment notice if needed</p> <p>* Collect &amp; track FSR/Conference Space rental payments and key deposits</p> <p>* Maintain FSR calendar</p> <p>* Set-up FSR room appropriately to specifics of user need</p> <p><u>Quarterly:</u> * Invoice for copier usage when applicable</p>

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<p><b>SE Uplift Direct Events &amp; Event Support</b></p>	<ul style="list-style-type: none"> <li>* Help plan and calendar events we will host for the year</li> <li>* Create and propose a budget for each event</li> <li>* Pursue and build working/on going relationships with community businesses and organizations</li> <li>* Plan and carry out events                             <ul style="list-style-type: none"> <li>- Venue, Food/Drink, Entertainment, Decorations, Servers</li> <li>- Allocate tasks to appropriate persons</li> </ul> </li> <li>* Advertise events through various media                             <ul style="list-style-type: none"> <li>- web, e-mail, flyers, newspapers</li> </ul> </li> <li>* Write and mail thank-you letters to donors</li> <li>* Maintain an in-kind donation spreadsheet</li> </ul>	<p><u>Monthly:</u></p> <ul style="list-style-type: none"> <li>* Women in Trade</li> <li>- De-construct pavilion outside</li> <li>- Build picnic table</li> </ul> <p>* Look into Sod for Lawn</p> <ul style="list-style-type: none"> <li>- Installation cost</li> </ul> <p><u>July:</u></p> <ul style="list-style-type: none"> <li>* Ice Cream Social</li> </ul> <p>* Clinton/Division St Fair</p> <p><u>August:</u></p> <ul style="list-style-type: none"> <li>* NNO Events</li> </ul> <p>* Sunday Parkways</p> <p><u>September:</u></p> <ul style="list-style-type: none"> <li>* Bike tour of homes in Richmond and Sunnyside</li> <li>- SE Uplift parking lot/host</li> <li>- September 19<sup>th</sup></li> <li>** above not yet solidified</li> </ul>	<p><u>Monthly:</u></p> <ul style="list-style-type: none"> <li>* Women in Trade</li> <li>- De-construct pavilion outside</li> <li>- Build picnic table &amp; chairs</li> <li>- October 13 &amp; 14th</li> </ul> <p><u>October:</u></p> <ul style="list-style-type: none"> <li>* Sustainability Forum</li> </ul> <p><u>November:</u></p> <ul style="list-style-type: none"> <li>* Community Resource Fair</li> <li>- Tim and Leah lead</li> </ul> <p>* Annual Appeal</p> <p>* Harvest Fair</p> <ul style="list-style-type: none"> <li>- Leah in lead</li> </ul>	<p><u>February:</u></p> <ul style="list-style-type: none"> <li>* Clean-Up Coordinator Meeting</li> <li>- Tim lead</li> </ul> <p>* Clean-Up Fundraising Event</p> <p><u>March:</u></p> <ul style="list-style-type: none"> <li>* Open House</li> </ul> <p>* Photo Contest / Art Event</p>	<p><u>April:</u></p> <ul style="list-style-type: none"> <li>* Volunteer Appreciation Event</li> <li>- Bowling Tourney</li> <li>- Tim and Leah lead</li> </ul> <p>* Ave of Roses Parade</p> <ul style="list-style-type: none"> <li>- AM Northwest</li> <li>- Participate in parade (banner/candy)</li> </ul> <p>* Earth Day tabling</p>

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<b>Staff Support</b>	<ul style="list-style-type: none"> <li>* Coordinate General Liability, Workers Compensation Insurance Renewals</li> <li>* Maintain up-to-date W-4's for each staff member</li> <li>* Issue and track key fob users and access times</li> <li>* Collaborate with Anne on Human Resource issues as they arise</li> <li>* Help answer any questions or take care of requests in regards to employee benefits</li> <li>* Help Kristen implement internship program - focus topics</li> <li>* Help staff understand the Fiscal Sponsorship program - policy &amp; procedure - donation tracking, admin fee if applicable</li> </ul>	<p><u>Weekly:</u></p> <ul style="list-style-type: none"> <li>* Attend weekly staff meeting</li> <li>- program update, new tasks, ask for help</li> </ul> <p>* Process reimbursement requests</p> <p><u>Monthly:</u></p> <ul style="list-style-type: none"> <li>* Payroll Training</li> <li>- update vacation &amp; sick accrual</li> </ul> <p>* Quickbooks Training - Bi-Weekly with Phyllis</p> <p><u>Quarterly:</u></p> <ul style="list-style-type: none"> <li>* Staff Retreat</li> <li>* ONI Quarterly Reporting</li> <li>- data entry of our tasks</li> </ul> <p><u>August:</u></p> <ul style="list-style-type: none"> <li>* Staff Reviews</li> </ul>	<p><u>Weekly:</u></p> <ul style="list-style-type: none"> <li>* Attend weekly staff meeting</li> <li>- program update, new tasks, ask for help</li> </ul> <p>* Process reimbursement requests</p> <p><u>Monthly:</u></p> <ul style="list-style-type: none"> <li>* Payroll Training</li> <li>- update vacation &amp; sick accrual</li> </ul> <p>* Quickbooks Training - Bi-Weekly with Phyllis</p> <p><u>Quarterly:</u></p> <ul style="list-style-type: none"> <li>* Staff Retreat</li> <li>* ONI Quarterly Reporting</li> <li>- data entry of our tasks</li> </ul>	<p><u>Weekly:</u></p> <ul style="list-style-type: none"> <li>* Attend weekly staff meeting</li> <li>- program update, new tasks, ask for help</li> </ul> <p>* Process reimbursement requests</p> <p><u>Monthly:</u></p> <ul style="list-style-type: none"> <li>* Payroll Training</li> <li>- update vacation &amp; sick accrual</li> </ul> <p>* Quickbooks Training - Bi-Weekly with Phyllis</p> <p><u>Quarterly:</u></p> <ul style="list-style-type: none"> <li>* Staff Retreat</li> <li>* ONI Quarterly Reporting</li> <li>- data entry of our tasks</li> </ul>	<p><u>Weekly:</u></p> <ul style="list-style-type: none"> <li>* Attend weekly staff meeting</li> <li>- program update, new tasks, ask for help</li> </ul> <p>* Process reimbursement requests</p> <p><u>Monthly:</u></p> <ul style="list-style-type: none"> <li>* Payroll Training</li> <li>- update vacation &amp; sick accrual</li> </ul> <p>* Quickbooks Training - Bi-Weekly with Phyllis</p> <p><u>Quarterly:</u></p> <ul style="list-style-type: none"> <li>* Staff Retreat</li> <li>* ONI Quarterly Reporting</li> <li>- data entry of our tasks</li> </ul>

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<p><b>Administrative &amp; Building Support</b></p>	<ul style="list-style-type: none"> <li>* Provide information and referrals to individuals and organizations</li> <li>* Assist with building related issues including maintenance and janitorial</li> <li>* Be knowledgeable of all office devices - telephones, copiers, fax, computers, postage</li> <li>* Maintain security and fire alarm systems - access codes, operation, brivo site</li> <li>* Conduct annual inventory of physical assets</li> <li>* Donate or Recycle old office supplies and furniture</li> <li>* <b>Building Committee</b></li> <li>* Create and put together a job specific binder               <ul style="list-style-type: none"> <li>- training tool</li> <li>- referral guide</li> </ul> </li> </ul>	<p><u>Weekly:</u></p> <ul style="list-style-type: none"> <li>* Change out universal save back-up</li> </ul> <p><u>Monthly:</u></p> <ul style="list-style-type: none"> <li>* Purchase office supplies</li> <li>- maintain base level of office supplies</li> </ul> <ul style="list-style-type: none"> <li>* Provide copier numbers to city</li> <li>* Maintain toner, paper supply and function of all office copiers/fax</li> <li>- recycle print cartridges</li> </ul> <p><u>Quarterly:</u></p> <ul style="list-style-type: none"> <li>* Maintain postage meter account</li> <li>* Maintain postal service bulk mail account</li> </ul> <ul style="list-style-type: none"> <li>* <b>Research and provide quotes for building renovation</b></li> <li>- rooms: agreed upon by staff and board</li> </ul> <ul style="list-style-type: none"> <li>* Put together Room upstairs for copying</li> <li>* Install new copier</li> <li>- Set-up to read all staff computers</li> </ul>	<p><u>Weekly:</u></p> <ul style="list-style-type: none"> <li>* Change out universal save back-up</li> </ul> <p><u>Monthly:</u></p> <ul style="list-style-type: none"> <li>* Purchase office supplies</li> <li>- maintain base level of office supplies</li> </ul> <ul style="list-style-type: none"> <li>* Provide copier numbers to city</li> <li>* Maintain toner, paper supply and function of all office copiers/fax</li> <li>- recycle print cartridges</li> </ul> <p><u>Quarterly:</u></p> <ul style="list-style-type: none"> <li>* Maintain postage meter account</li> <li>* Maintain postal service bulk mail account</li> </ul> <ul style="list-style-type: none"> <li>* <b>Research and provide quotes for building renovation</b></li> <li>- rooms: agreed upon by staff and board</li> </ul>	<p><u>Weekly:</u></p> <ul style="list-style-type: none"> <li>* Change out universal save back-up</li> </ul> <p><u>Monthly:</u></p> <ul style="list-style-type: none"> <li>* Purchase office supplies</li> <li>- maintain base level of office supplies</li> </ul> <ul style="list-style-type: none"> <li>* Provide copier numbers to city</li> <li>* Maintain toner, paper supply and function of all office copiers/fax</li> <li>- recycle print cartridges</li> </ul> <p><u>Quarterly:</u></p> <ul style="list-style-type: none"> <li>* Maintain postage meter account</li> <li>* Maintain postal service bulk mail account</li> </ul> <ul style="list-style-type: none"> <li>* <b>Research and provide quotes for building renovation</b></li> <li>- rooms: agreed upon by staff and board</li> </ul>	<p><u>Weekly:</u></p> <ul style="list-style-type: none"> <li>* Change out universal save back-up</li> </ul> <p><u>Monthly:</u></p> <ul style="list-style-type: none"> <li>* Purchase office supplies</li> <li>- maintain base level of office supplies</li> </ul> <ul style="list-style-type: none"> <li>* Provide copier numbers to city</li> <li>* Maintain toner, paper supply and function of all office copiers/fax</li> <li>- recycle print cartridges</li> </ul> <p><u>Quarterly:</u></p> <ul style="list-style-type: none"> <li>* Maintain postage meter account</li> <li>* Maintain postal service bulk mail account</li> </ul> <ul style="list-style-type: none"> <li>* <b>Research and provide quotes for building renovation</b></li> <li>- rooms: agreed upon by staff and board</li> </ul>

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<p><b>Manage Receptionist Janitor</b></p>	<p>Receptionist:            * Training            * Allocation of duties            * Oral and Written Review</p> <p>Janitor:            * Allocation of duties</p>	<p><u>Monthly:</u>            * Check-ins</p> <p>* One on one trainings</p> <p>* Re-imbusement of funds spent for supplies</p> <p>* Provide time-sheets</p> <p>* Provide copy of FSR and events calendar</p> <p><u>Quarterly:</u>            * Write and go over review</p> <p>* Help move Janet's Office upstairs</p> <p>* Discuss 3 month goals with Janet            - increase # of tasks            - increase independence</p> <p>*</p> <p>*</p>	<p><u>Monthly:</u>            * Check-ins</p> <p>* One on one trainings</p> <p>* Re-imbusement of funds spent for supplies</p> <p>* Provide time-sheets</p> <p>* Provide copy of FSR and events calendar</p> <p><u>Quarterly:</u>            * Write and go over review</p> <p>* Discuss 3 month goals with Janet            - increase # of tasks            - increase independence</p> <p>*</p> <p>*</p> <p>*</p>	<p><u>Monthly:</u>            * Check-ins</p> <p>* One on one trainings</p> <p>* Re-imbusement of funds spent for supplies</p> <p>* Provide time-sheets</p> <p>* Provide copy of FSR and events calendar</p> <p><u>Quarterly:</u>            * Write and go over review</p> <p>* Discuss 3 month goals with Janet            - increase # of tasks            - increase independence</p> <p>*</p> <p>*</p> <p>*</p>	<p><u>Monthly:</u>            * Check-ins</p> <p>* One on one trainings</p> <p>* Re-imbusement of funds spent for supplies</p> <p>* Provide time-sheets</p> <p>* Provide copy of FSR and events calendar</p> <p><u>Quarterly:</u>            * Write and go over review</p> <p>* Discuss 3 month goals with Janet            - increase # of tasks            - increase independence</p> <p>*</p> <p>*</p> <p>*</p>

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<b>Fiscal Responsibilities</b>	<p>* Work with Phyllis on reconciling and reporting: monthly, quarterly, yearly</p> <ul style="list-style-type: none"> <li>- Training Bi-weekly</li> <li>* <i>Fiscal Sponsorship:</i></li> <li>- reconfigure application, % admin fee, web info</li> <li>- maintain up to date records and contact information</li> <li>- mail thank-you letters accordingly</li> </ul> <p>* <i>Small Grants:</i></p> <ul style="list-style-type: none"> <li>- track expenses, timeline of grant</li> <li>- maintain up to date records and contact information</li> <li>- inform city of account activity when applicable</li> <li>- mail thank-you letters accordingly</li> </ul> <p>* <i>Quickbooks:</i></p> <ul style="list-style-type: none"> <li>- maintain up to date vendor, customer and job lists</li> <li>- create invoices when applicable</li> <li>- record debit transactions, bank transfers</li> <li>- journal entries when applicable</li> <li>- coding wrksh/labels</li> </ul>	<p><u>Weekly:</u></p> <ul style="list-style-type: none"> <li>* Process Staff Reimbursement requests</li> </ul> <p>* <i>Deposits:</i></p> <ul style="list-style-type: none"> <li>- Record and Copy all checks and cash received</li> <li>- Fill out bank deposit slip and deposit funds</li> <li>- Enter into QuickBooks</li> </ul> <p>* <i>Vendors:</i></p> <ul style="list-style-type: none"> <li>- Accounts Receivable &amp; 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