Sequence Updated since last worksheet	Task Updated since last worksheet	Responsibility (blue indicates board or board member action required)	Critical -- must happen before "go-live"?	Status Yellow indicates task requiring most immediate action by board. Gray indicates task requiring most immediate action by Bob
1	Update **verbiage on existing grants page**. Several suggestions for improvement have been floated -- rightly so since this is arguably the most important customer-facing page.	> Per note from ▇▇▇ 5/1/17 *"Lynette will own the wording for the grants section. She will draft some wording and send it to ▇▇▇."* > Per chat with ▇▇▇ 5/3/17 suggest folding in ▇▇▇▇ ▇▇▇▇ comment: *"In the focus section of the grants page I think we could be a little more open conveying that our focus has been on helping the homeless or preventing homelessness 'with a particular emphasis' (or similar language) on youth and veterans. This is just so people don't think we are restricted only to youth and veterans projects."*	Yes	NEED BY DECISION BY BOARD MEMBER(S). As of 5/16/17 I have adjusted the verbiage in line with the embedded application form along with some preferred practices around file (a) name, (b) formatting and (c) uploading.
2	Determine **where to post governance documents** -- i.e., make them public or board-members only.	Board decision; if I recall correctly: > ▇▇▇ suggested these docs aren't really of interest to the public whereas … > … ▇▇▇e thought posting them publicly was good for transparency > For now these documents are on the board members only page but this can be easily changed	Yes	NEED BY DECISION BY BOARD MEMBER(S)
3	Determine whether or not to include content about the **loan program.**	> Board decision > Will initially leave this page OFF the website	Yes	NEED BY DECISION BY BOARD MEMBER(S)
4	Installed plugin to **create board-members-only access**. Settled on plugin Simple WP Membership per recommendation of ▇▇▇▇ Works as advertised. Sample member record: user = ▇▇▇▇ email = ▇▇▇▇ password = ▇▇▇▇	Bob	Yes	COMPLETED PROTOTYPE 5/5/17; board needs to provide me with current list of members requiring this access.
5	Purchased and installed plugin (WPForms) to **automate grant application activity** – collecting basic information, allowing them to upload and store their documents, generate responses. Test this -- works as advertised.	> Bob will install and initially test the functionality. > Grant committee members(s) should review, recommend wording for automatically-generated responses and suggest any further tweaks	Yes	COMPLETED 5/4/17 WPForms purchased for annual fee of $▇▇▇. I have created a prototype form on the "Applying for Grants" page. Everything is working in terms of capturing and storing information and uploading documents. As noted to the left Lynette et al need to review and modify prototype vis-à-vis verbiage and fields requested on form. See also 5.1 below.

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6	**WPForms purchased, loaded and working**. (1) Email CC function -- which otherwise works -- is not properly forward grant applicant emails to ▮▮▮▮▮▮▮▮▮▮▮. Seems to be problem specific this "grants" email setup. Work-around described in status column to right..	Bob	Yes	COMPLETE 5/5/17 Tested and confirmed functioning of basic steps of: a. Applying for grant b. Receiving email response c. Message forwarded from (b) to ▮▮▮▮▮▮▮▮▮▮▮ d. Message forwarded from (c) to email grants@wellsfound.org
7	To **view applicant entries would like** to set up separate (new) WP admin access with narrower view -- i.e., WPForms "Entries" page only.	Bob,▮▮▮▮	Yes	COMPLETE AS OF 5/5/17. The slightly cumbersome solution is that an administrator will have to be the one to pull the application. Sought advice from Richard can but this appears to be the only option.
8	**Remove temporary comments** (in blue) on WIP WordPress page.	Bob	Yes	COMPLETED 5/3/17. Comments saved in Word document *2017-05-03 blue notes removed from pages.docx* if we ever wish to refer to them again.
9	Organize past **Wells meeting minutes** and post them on the corresponding website page.	Bob (will use files of minutes James et al collected a few months back)	No	COMPLETED 5/3/17 for all the minutes I found (last published document I have is January 15, 2017)
10	Upload/organize/post 2017 the remainder of **2017 grantee application materials** (only a sample are there now).	Bob	Yes	COMPLETED 5/5/17
11	Organize **site visit notes** and post them on the corresponding website page.	> Sites that are currently posted are: o ▮▮▮▮▮▮▮▮▮▮▮ o ▮▮▮▮▮▮▮▮ o ▮▮▮▮▮▮▮ o ▮▮▮▮▮▮▮ > Need board member(s) to collect and forward any other ones	No	BOARD ACTION REQUIRED. On 5/3/17 spoke with ▮▮ about this
12	Add **captions to photos** through the site.	Bob	No	COMPLETED 5/3/17
13	Sync **page titles** with **menu references** (will make maintenance & documentation easier -- previously overlooked detail).	Bob	No	COMPLETED 5/5/17
14	Reformat **annual report content** and collateral IRS 990 document links (former requested by▮▮▮▮	Bob and (?)▮▮▮▮▮ if necessary (gap for 2012)	No	
15	Elicit **photos & bios of new board members.**	> Needs to be tasked to some board member > Bob can post once this is collected	No	NEED BY ACTION BY BOARD MEMBER(S)
16	Confirm if Wells **address on Amazon Smiles** is correct.	Inez (?) -- assume she set this up	No	NEED BY ACTION BY BOARD MEMBER(S)

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17	Correct Wells **address on GiveMN.org** membership page.	Board member needs to follow up with them and provide copy of a canceled check in order for them to change the address	No	NEED BY ACTION BY BOARD MEMBER(S)
18	**Create and load "favicon"** (a file containing a small icon associated with the website that appears on the browser tab when the website is accessed).	Bob	Yes	COMPLETED 5/4/17
19	**Backup website content from**▬▬▬▬. Per▬▬▬ "*Look in the 'files' section of the Control Panel, two backup options.*▬▬▬▬▬▬▬".	Bob (and▬▬▬if necessary)	Yes	COMPLETED 5/6/17 in advance of next task.
20	Create **Wells footprint on A Small Orange**: a) Get the hosting account set up at A Small Orange. b) Finish updates to the wellsfound.org staging site c) Make a complete backup of the staging site d) Upload backup to the new account at A Small Orange	Bob	Yes	COMPLETED (a), (b), (c) 5/6/17 -- have created account on▬▬▬▬. Received discounted annual price for hosting of $▬▬. Also purchased daily cloud backup for $▬▬ (also for one year). Total $▬▬
21	**Test/review wellsfound.org on**▬▬▬▬o insure everything is in order, including: > Verbiage on pages > Graphics > Video > Menu structure > Hyperlinks > Font colors, bold, italics > What is viewable by board members only	Bob,▬▬▬▬e	Yes	COMPLETED 5/16/17. Provided▬▬with temporary URL instructions. Board needs to determine when we go-live (this basically involves performing the action described in the row below). Could be done right now even with other decisions pending.
22	**Change the Domain Name Servers for the wellsfound.org** domain to make the new site live	Bob,▬▬▬	Yes	
23	Inform▬▬▬▬ of▬▬▬▬▬▬ that the **legacy Joomla website can be inactivated**. Address any additional payment requests he brings up.	▬▬▬offered to be the one to contact▬▬	Yes	
24	**Conduct training** for board members (all? selected?) on using the new site -- focusing mainly on the grant applicant tracking and communications capability.	Bob and board members	Yes	Suggest a small group of players (e.g.,▬▬▬▬▬ ▬▬▬Bob) convene for 2 hours to do this knowledge transfer. [Obviously] This should be done prior to the "go-live".
25	Upload all **legacy website content** and ancillary files to the **Google Drive space** associated with ▬▬▬▬▬▬ This includes media, documents and local copy of legacy Joomla website.	Bob	No	

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26	**Document location of other critical documents** such as PowerPoint files that serve as the basis for home page and historical videos.	> Bob will document > Board decision as to who should be the backup here	No	
27	For safety/backup purposes **document all URLs, user IDs and passwords** related to the website and provide these to someone on the board for safekeeping. Suggest this be stored on Google Drive space associated with ▬▬▬▬▬	> Bob will document > Board decision as to who should be the "keeper" here	No	
28	**Identify who "owns" pages on the new website going forward** -- for example, Karen own minutes, someone else owns board member bios & photos etc.	Board decision(s)	No	
29	**Create "going forward" SOP** for forwarding updates, changes, enhancement requests etc.	Suggest at least initially ▬▬▬ be POC for all changes and that she funnel them to -- and work with -- Bob	No	