**General Administration Planning Worksheet**

Basic administrative items include the formal name, mailing address, phone number, email address, hours of operation, and website. Here, we want to start thinking about the very basics of how your organization will connect with the world. If you don’t have all of the information yet, that’s okay! You’ll just want to start thinking about these items and have them ready when we complete the Operations Manual and website.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Step 1: Name**

[Insert Here]

What is the organization’s official name? Are there any other names the organization might go by?

Example:

The official name of the organization is Kentucky Bluegrass Center for Homelessness Prevention. The name may be shortened to “KYB Center” when necessary.

**Step 2: Location**

What is the organization’s address? Is there a physical address and/or a PO Box?

[Insert Here]

Example:

Our physical address is:
123 Madeup Street
Bluegrass, KY 12345

Our mailing address is:
PO Box 489868345678
Bluegrass, KY, 12345

**Step 3: Phone Number**

[Insert Here]

What is the phone number?

Example:

Our phone number is: (123) 456-7891

[Insert Here]

**Step 4: Hours of Operation**

What are your standard hours of operation?

Example:

Our office hours are Monday-Sunday from 8am-8pm.

**Step 5: Website & Email Address**

[Insert Here]

What would you like your website address to be? Note: If it’s taken when we get to the website building section, we can always come back and change it. Your general email address is usually info@yourwebsite.com.

Example:

[www.kybhomelesservices.org.allpeoplethriving.com](http://www.kybhomelesservices.org.allpeoplethriving.com)
info@kybhomelesservices.allpeoplethriving.com

**Step 6: Internal Communications**

[Insert Here]

Now it’s time to think about who will check the mail and email, and manage the internal communications. Who will check the mail? When? Who will answer the phones? What is the response time in your organization?

Example:

The Office Management team is responsible for checking mail, answering phones and responding to the general email account. The main phone is answered by the Office Management team Monday-Sunday from 8am-8pm. Messages are responded to within 48 hours. The email account is checked daily by the Office Management team during normal hours. Emails are handled (i.e. forwarded or responded to) within 48 hours. Mail received at the office is distributed daily by the Office Management team. The PO Box is checked on Fridays, and mail received in the PO Box is distributed on Mondays.

**Step 7: Tools & Technologies**

[Insert Here]

One of the most important aspects of being organized is making sure you know all your third-party account information, and that’s it’s easy for you to find. If you have a variety of software and accounts, it can be easy to forget a bill, or subscription. Here, we want to capture the tools you’ll be using, and keep them in a single place. For security reasons, you may want to keep your passwords in a separate location, and you’ll always want to redact passwords in any Operations Manual you distribute to others. You may not know all of this information quite yet, and that’s okay. But you’ll want to be in the habit of adding all accounts into a single location so you can readily prepare your budget, access information in the event of a staff turnover, or simply to know all the accounts that you’re working with.

Example:

InMotion Hosting (Website - $120.00/Year)
[www.inmotionhosting.com](http://www.inmotionhosting.com)
Username: FakeFakeFakeFakeFake
Password: Even More Fake

JotForm (For Registration, Donations and Payment Processing - $19/month)
[www.jotform.com](http://www.jotform.com)
Username: FakeFakeFakeFakeFake
Password: Even More Fake

**Step 8: Complete and Save!**

Now we’re ready to move on to the next section. You’ll just want to save this document so that you can return to it when you have additional information to add and/or for when we put together the Operations Manual.