Standard Operating Procedures

Administrative Assistant - Tourism

City of Onalaska

Oldenburg, Ashley

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# 

To access **ANY** documents on Ashley’s Computer, either get it from the **“H”** drive (shortcut is on my desktop, sometimes you have to right click the icon and press “open”) **OR** see if the files are on my desktop. Such files are: Business List, OABA master, 2013 Stats (occupancy stats), etc. **If you get any files not from the H drive, it will not be the most recent file and won’t be correct!**

**Ordering Office Supplies**

I have a tab on my favorites under “office”. Current log in password is “OnaTourism”. Submit PR/PO request after we get order.

**Other tasks…**

**March**

Send out OABA newsletter Friday, March 28 or Monday, March 31. Send out reminder e-mail Wednesday, April 2 or Thursday, April 3.

**April**

(Already printed) Hang good Friday hours sheet on door week prior (found in lower left hand drawer in file folder (hours posters)

Send out follow up e-mail on OABA banquet silent auction items and keep collecting (banquet is April 25)

**May**

Send out OABA newsletter Monday, May 5 and reminder e-mail Thursday, May 8.

(Already printed) Hang Memorial Day hours on week prior (found in lower left hand drawer in file folder (hours posters)

**To find Dells Sales Logs & Update them…**

Go to cash sales register folder, open seasonal sales and open files necessary and update ticket sales numbers. Put in binder and add the money folders found in Amy’s Office

**June**

Send out OABA newsletter Monday June 2 and reminder e-mail Thursday, June 5.

**Social Media**

OABA Posts scheduled through June for reminders about luncheons and banquet. Add any new business updates as you see fit.

|  |  |  |
| --- | --- | --- |
| **General Duties** | | |
| Weekly | Monthly | Annually |
| * + - * Balance Cash Register (Monday & Fridays)       * Send out visitor information requests       * Change featured events on website if necessary | * Occupancy Stats (1st of month) * Social Media Stats (1st of month) Document in tasks in Microsoft Outlook * Visitor Log Counts * Social Media Calendar Planning | ***January***  Promotional Grants  OABA Scholarships  ***April***  *OABA Annual Banquet*  ***July***  Promotional Grants  ***August/September***  Associated Lodging Memberships  ***October***  Start working on finding events for next year for VG and other sources. |

# 

# Opening office

1. Get newspaper
2. Unlock doors (lock open)
3. Turn on both open signs (lobby & marketing office)
4. Turn on back room lights & copy machine
5. Get keys from right drawer in front desk
   1. Turn on cash register to “reg” and sign in with clerk number
      1. “Clerk Number” and CLK# key
   2. Put key in top left drawer in front desk (where bike passes and state park stickers are kept)
   3. Unlock cabinet in Directors office (top) and get seasonal sales binders; bring to front desk
6. Water any necessary plants
7. IF ADMIN ASSISTANT IS GONE:
   1. Turn on computer and check outlook for new e-mails
   2. Respond to any requests/inquiries
      1. Voicemail Password
         1. General Mailbox
            1. 1234
         2. Admin Assistant
            1. 9571
   3. If there are “Information Requests,” take pre-made envelope from drawer on left side, second down and fill out address and send out. Record on our visitor log. Put address on postcard for follow-up

# Closing office

* Turn off copy machine in back
* Put seasonal sales binders back in directors top cabinet
* Take key, along with bike pass key and cash register key and put in top right drawer
* Turn off “open” signs
* Turn off all lights
* Lock doors

# Balancing Cash Register (Monday and Friday’s) (Desktop, 201X Remittances)

## Balancing

* 1. Get “program” key from cabinet in director’s office from cash box located in second compartment, on top shelf in cash box
     + Count cash (start-up is $250) hint: push “n/s” to open drawer
  2. Close drawer and…
     + Put program key and turn to “x” (NOT “z”, ever… )
     + Log on with clerk number (Clerk number, then CLK# key)
     + Push all department keys once (1-17)
     + Push “subtotal”
     + Push “cash amt/tend”
     + Tape will print
  3. Confirm cash matches tape (remember, total cash - $250)
  4. Confirm cash register sales in binder match cash register tape
     + Make any necessary updates in cash sales binder

## Making a Remittance

* + Set cash/checks aside that you will be remitting
    - Put “Program Key” to “refund”
    - Sign on with clerk number’
    - Enter dollar amount refunding (without pressing the “.” Ex: 2550 for $25.50)
    - Click department the money is being taken out of (ex: 1-annual bike passes)
    - Press “subtotal”, then “ca/amt tend”
* Open excel file “201X” remittances” on desktop
* Create new sheet (on bottom) with date & type of remittance
  + Type of remittances include (1) **Bike Passes**, (2) **Miscellaneous Items** (apparel, pins, magnets, calendars, etc) (3) **Yard Waste Stickers**,(4) **State Park Stickers** and (5) **Park and Rec** (any discount tickets we sell in the summer months)
    - Copy sheet from previous remittance (make sure it matches type ex. Copy bike for new bike remittance, copy misc. for new misc. remittance) for formatting and paste onto new sheet for your new remittance
    - Fill in necessary information (include numbers of tickets/passes sold, make sure cash and checks match up with total your remitting)
  + Print (3) copies when finished
    - One goes in the cash register binder
    - One goes to Director
    - And one goes with the deposit bag to finance
* Bike passes and Miscellaneous items get turned into Finance Director
* Park and Rec Remittances get turned into Park and Rec department
* State Park Stickers go to Lois Larson at Perrot
* Yard Waste Stickers go to Vicky in Planning & Zoning

## Making Changes to Cash Register Settings

* Please see cash register settings book located on desk

# Seasonal Sales (H: Documents, Cash Sales Register, Seasonal Sales)

Binder found under cash register. Bags found in marketing office in drawer to left. File found for sales recording sheet in (H: Documents, Cash Sales Register, Seasonal Sales) . When not in use and it has money in it, please lock up at the end of the day in director’s office cabinet.

Make remittances to Park and Rec or designated group appropriately. Balance when you balance the cash register.

# OABA Responsibilities (Desktop, OABA Master OR H: Documents, All OABA)

## OABA Website

1. To make a change on the online OABA website:

* Either… make note of it and I can change it when I get back ☺ **OR**
  + Click the folder “event web” on the favorites tab
  + Click OABA
    - User: Oaba
    - Pass: Oaba08

1. You can upload the current months newsletter, change details in the business directory and update “events”

## Mail

1. Make a copy of application/renewal and check - checks and bank information go to treasurer; other information goes to president
2. File copy of checks and renewals in OABA binder in the 201X folder when complete with instructions below.

## Renewal or New Member

1. Update master list with updated/new information (Desktop, OABA Master)
2. Update [www.oaba.info](http://www.oaba.info) if necessary
   1. Click on Internet Explorer
   2. Click “Event Tab” in favorites
   3. Click OABA
   4. Make necessary changes to membership directory
3. Update E-mail lists (Outlook, Contacts, “OABA Members”; add in contacts)
4. Send out “OABA decal” to new members
5. Make new name tag for new members or members with updated information
6. Keep current list for Treasurer showing $150 members (print and/or e-mail before each monthly luncheon)
   1. In access database, click on 150 member query. Print.

## 

## Solicitations to new Onalaska Businesses

1. Gather information about new business from La Crosse Tribune
2. Send out solicitation letter with current newsletter and application
   1. Add new business/es in “Solicitations Table” in “Master List” (Desktop, Master List)
   2. Get Soliciation Letter template from (H: Documents, All OABA, Solicitation Template)
      1. Edit next luncheon information and print on OABA letterhead

## Monthly Newsletter

1. Log into ConstantContact.com
   1. Click the e-mail tab
   2. Hover over previous months newsletter
   3. Click “copy”
   4. Rename current month
   5. Save
2. Change monthly information
   1. Content includes:
      1. Gathering appropriate updates on members from La Crosse Chamber Connection, LACVB Newsletter, Local Newspapers, and LADCO newsletter
      2. Composing events list for upcoming month
      3. Other necessary information
3. Send newsletter via email with next meeting details and RSVP reminder to OABA board members for approval –
   1. Click “preview”
   2. On left hand side type in e-mail’s you want to send it to
   3. Enter note saying this is a draft
   4. Click “send a test”
4. Send to OABA members
5. Click “preview”, click “view printable version”, click print, choose Primo PDF and name. Put into OABA newsletter folder and upload to website.

**OABA RSVP (Desktop, OABA Master List)**

1. Open master list document.
2. Open query “monthly luncheon”
3. Click “Design View” in upper left corner
4. Select dropdown in first column and choose upcoming month ”X/14”
5. Click “Datasheet” view and yes to save.
6. Organize by last name and print.

## OABA Scholarships (H: Documents, All OABA, Scholarships)

1. Send out scholarship information in January. Make deadline before Annual Banquet so awards can be presented there.
   1. Update all necessary paperwork to send out found in “scholarship” folder
      1. Proper deadline dates, etc.
   2. Verify name of counselors in charge of scholarships and mail to all four high schools
      1. OHS
      2. Luther
      3. Aquinas
      4. Holmen
2. Collect applications at Tourism Office Address.
3. When application is received…
   1. Enter into spreadsheet
   2. Give to OABA Treasurer for review, when he gets back to you…
      1. Type and mail letters to winners and letters to applicants that didn’t.  Type certificates for winners to be presented at Annual Banquet. Certificates found in marketing office OABA drawer

## OABA Grants (H: Documents, All OABA, Grants)

1. Send out to groups sponsoring events that directly impact businesses, institutions or organizations within the City of Onalaska or Town of Onalaska.  Keep current list of award winner’s names.

## Monthly Luncheons

1. Email all OABA members with upcoming meeting information and current newsletter on the first of the month or week before RSVPs are due.
   1. Right now I copy and paste e-mails from database to Outlook, I do not have a group created.
2. Follow up Wednesday/Thursday before meeting with an e-mail to those who have not RSVD’s
   1. I put everyone who has RSVP’d in the correct month in the access database, then I create a mail merge e-mail in Microsoft word and send e-mail out to only those who have not RSVP’d
3. On average about 40-50 guests attend monthly
4. Call La Crosse Country Club with lunch count on Friday. Ask OABA secretary if speaker needs projection screen or extra table.

**Annual Banquet**

1. Create invitations, get approval, send to print, mail out to:
   * 1. OABA Members
     2. City Alderpersons
     3. Scholarship winners and their parents (they already know they won the scholarship)
     4. Other Onalaska Businesses
2. Get info for program, i.e., who’s giving invocation, who will provide music, do we have guest speaker, what time will things begin, when serving dinner, when closing bidding, when announcing winners, when presenting scholarships to students.  Create program, (usually printed in-office)
3. Collect RSVP’s and keep dinner count.  Call/E-mail all members who have not responded.  Give dinner count to venue.

**Silent Auction**

1. In month or two prior to banquet, put notice in monthly newsletter that OABA is looking for donations.
2. Send out reminder e-mails.
3. Make phone call follow ups
   1. Offer to pick up items being donated if it’s easier
4. I create a spreadsheet in the OABA, Banquet folder to keep track of items donated
   1. I then create a merge in word document “silent auction sheet” for the sheets people to place bids on.
5. Create thank you and mail/e-mail out to those who donated silent auction items after banquet
   1. Past two years, we have sent out an e-mail (found in OABA folder) with those who have donated saying thank you. Ask board what it is they want to do.
   2. Thank you notes are found in OABA drawer in Marketing office. Usually we print the thank you’s in our office.

## Other

* Answer phone and visitor inquiries about organization.
* Update OABA Facebook and LinkedIn

# Miscellaneous Office Documents of Importance

## Hours Posters (H: Documents, Misc Office Info,Office Posters & Directions)

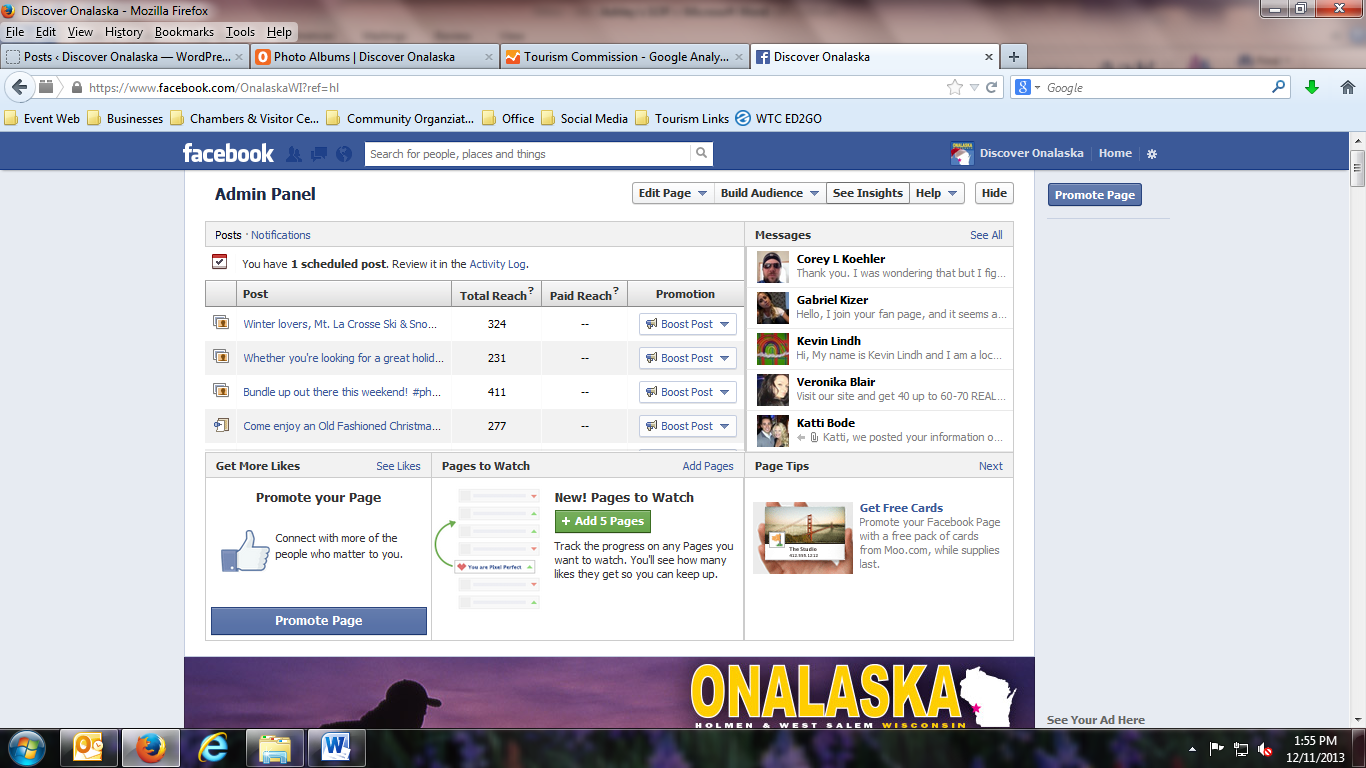
1. Edit Microsoft Word document as needed.

## Usernames & Passwords (H: Documents, Misc Office Info)

1. Edit Microsoft Word document as needed.

# Tourism Commission Documents

## Facebook

1. Log into Facebook
2. Go to the Discover Onalaska page
3. Click “See Insights” 
4. Open file from previous month in (H: Documents, Misc Office Info, Facebook Stats)
5. Save as “ Current Month, Year”
6. On Facebook, Click “Likes”
7. Change date to month requested.
8. Take print screen of “Net Likes” and “Where your likes came from” and paste in current months document.
9. Do the same for Reach and People. Save.
10. Print two copies for Jean.

## Google Analytics

1. Log into google analytics at <http://www.google.com/analytics/> with google sign in information.
2. Click “Onalaska Tourism Commission Website”
   1. Onalaska Tourism Commission Website - Master
3. On left hand side, click “dashboards”
4. Click “private”
5. Click “Tourism Commission”
6. Change display dates to month you need to view.
7. Export document to (H: Documents, Misc Office Info, Google Analytics)
8. Print off (2) copies in color and give to Jean.

# Associated Lodging (H: Documents, Annual Promotions, Associated Lodging)

1. Binder for old documents is found under cash register in binder.
2. Update cover letter and applications for current year
3. Mail out to other area lodging facilities (File name “Associate Lodging Recipients”
4. Make remittance of checks after deadline from facilities chosen to participate
5. Update “Partners” document and give to office employees for reference.
6. Make sure correct Associated Lodging members are listed in upcoming visitor guide.

# Occupancy Stats

* On the first of each month (or first day back to work if it falls on a weekend/holiday) send e-mail to lodging facilities asking for previous months Lodging Stats

# Social Media (Desktop, Social Media Calendar)

* To view passwords and usernames see “Usernames and Passwords” in (H: Documents, Misc. Office Info, Usernames and Passwords) OR see Office Information Binder for a hard copy.
* Open “Social Media Calendar” on desktop to follow schedule
  + If changes are needed to calendar follow “events calendar” in outlook for a guide. Also can use La Crosse Tribune, newsletters for other info
    - Facebook (Be made admin for updates)
      * Keep information current. Make at least a few posts weekly on Onalaska News, pictures, and upcoming events but no more than one post a day and make sure it’s relevant to those who “like us”
      * Tip: you can schedule posts ahead of time
    - Twitter
      * tweet upcoming events, photos, etc. for Onalaska
      * Update daily
      * Can schedule posts ahead of time on “hootsuite”
    - Pinterest
      * Pin upcoming events, photos, etc. for Onalaska
      * Browse those you follow for relevant “re-posts”
    - Google +
      * Pin upcoming events, photos, etc. for Onalaska
    - YouTube
      * Find videos relating to Tourism and Onalaska and share/post
    - Foursquare
      * Is included with posts when scheduled on hootsuite

# Business List (Desktop, Business List)

* Update accordingly.
* To export and print for customer
  + Open Business List Database
  + Click on “external data” tab
    - Click under export section “excel”
    - Click “browse”
    - Click H: drive folder
    - Click business list folder
    - Name file Onalaska Business list xx.xx.xx (include current date)
    - Click okay
    - Click close
  + Retrieve file from Business Folder
    - Open
    - Delete unnecessary fields and especially EMAIL. We do not provide that to the public.
    - Set print area and make page landscape
    - Go into page setup
      * Click sheet tab
      * Click “rows to repeat at top” and highlight row 1
    - Click “insert” on top tab
      * Header/footer
      * Footer
      * Choose page numbering
    - Should be ready to print or e-mail to customer

# Brochure Ordering (H: Documents, Brochure Ordering, Open Access File)

Update necessary information when ordering and receiving brochures.

# Promotional Grants (January & July) (H: Documents, Annual Promotions, Promotional Grants)

* Binder for old documents is found under cash register in binder.

Open Organizations Sent

* + Verify contact information is up to date and add any other organizations necessary
* Update Promotional Grant application and cover letter for current year
  + Mail out to organizations sent list
* Update “applications received” as applications come in
* Turn in applications to director for Tourism Commission Board to approve at next meeting
* Mail out approval/disapproval letters to winners along with guidelines for receiving funds to winners

# Printing Label Leads from Pilch & Barnet

1. Save file under Shared Drive; Pilch & Barnet; Best Bets & Midwest Living; 201X Folder as a regular Excel document.
2. Close Excel file. Open Microsoft word and create mail merge with labels.
3. Labels are located in the back in the drawer labeled “Tourism Labels” or sometimes by the printers.
4. Make sure you don’t print the labels on both sides of paper. Change your printer settings to avoid this.
5. Print (2) sets of labels, one for visitor guides, one for follow up postcards.
6. On the visitor guides, you also have to put mailing dots on the long side of the book.
7. Sometimes weekend staff can help with these tasks.

# How to use the Scanner

1. Make sure power is on.
2. On the desktop click “Epson Scan”
3. Click “preview”
4. Click “Scan”
   1. You can preview scan or just scan right away.
5. Make sure you click a destination where you want the file to end up. It usually will go into pictures folder under the current date.
6. Send via e-mail or put on shared drive to retrieve from other computers.

# Information Guide (H: Documents, Information Guide)

* Update accordingly both in binder and on documents found in folder.

# Community Profile (H: Documents, Information Guide, Community Profile)

* Update accordingly.
  + Put current version:
    - On website
    - In relocation folders

# Student Inquiries (H: Documents, Misc Office Info, Student Inquiries)

* If you get a letter from a student around the state, we send them a letter and a regular visitor guide package along with one of each of the Onalaska postcards (3).

# Map Changes Inquiries (H: Documents, Annual Promotions, Map Changes)

Typically maps are printed every 6 months.

* Open folder.
* Copy previous map changes document and make new one.
* Make changes as necessary following same format if possible.
* Send/drop off to Miller Quik Print for changes.
* We order 10,000 in pads of 100.

**Great River State Trail Friends**

* If we received a check or cash from the vendors, please mark down the amount in the Great River State Trail friends book located in the closet in the top left drawer binder. Please total and mark down when Friends group collects money.
* If passes need to be signed out, mark accordingly in binder under dailies or annuals. Include vendor signing them out and date. Make sure passes match with numbers on books and numbers on the control log. Make sure to give them a recipient. (This is good measure and record keeping for us and them.)

# UPS Shipments

Under my favorites in firefox, under office, click UPS.

Login info: cityona54650

Password: 415main

Some visitor centers may be saved in the address book. Make sure you have Tourism as the ship from address. Enter information accordingly. Print label. Tape to visitor guide box.

# Calendar of Events

Update accordingly in Outlook. Update on other websites as necessary.