

Consulting Executive Director/Office Technician Activity Report  
April 12, 2011

February 15 - April 12, 2011

**Administrative**

Continuing research related to budget records and fiscal accounting systems associated with the Department of General Services (DGS) budget spreadsheets.

Worked closely with Office Technician in reviewing TECs and discussed methods for improving processing.

Strategizing with respect to determining processes related to procurement, purchasing authority and completed application for CalCARD.

Assisted in answering members questions related to meetings, resource manuals, agendas, TEC status and various misc. issues.

Visited with OT, State surplus warehouse, looked at office furniture and equipment.

Developed lists of needed IT software and equipment, worked closely with OT in seeking bids for services.

Completed application process for office "Petty Cash" account.

In partnership with Office Technician, completed tasks needed for telecommunications upgrade (phones).

Developed an amended contract with SCO due to an unforeseen increase in "Human Resource" assistance.

Completed necessary tasks associated with renewing the CSL lease for Room 513 with Senate Rules and CSL leadership as lease had expired in 2008.

Created budget template with object codes and balance to actual based on DGS model.

Prepared combined operating budget incorporating CFoA revenue.

Arranged for removal broken filing cabinets from office, worked with OT in setting up fiscal and vendor files and researching archival process for files dated 1985-2000.

Reviewed October Session and legislative committee budgets, incorporated into template.

Research on Accident policy for member coverage in 2011-12, working with Office of Risk Management

Met weekly in 1-2 hr meetings (Fridays) to review work performed/tasks completed during the week.

**Membership**

Established a member distribution list on email marketing software, designed online news template and developed content.

Updated legislative proposal spreadsheet for members as needed (worked with Lola on tracking), scanned hard copy “unbacked” proposals as presented to CSL and sent out to Leg Committee and CSL members as needed, prepared legislative support/co-sponsor letters

Continue to field calls from public and legislative staff related to the 2010 Top Ten CSL proposals, as well as general requests for help in the community or to note complaints regarding cuts to services.

Traveled to and visited with members of Los Angeles City/County Caucus, distributed materials and answered questions regarding budget issues.

Developed updated job descriptions for Consulting Executive Director, Office Technician and proposed Annual Session Coordinator following meeting with CSL member working on Resource Manual updates.

Reviewed session task list- sent out proposal form and abbreviated schedule to member, e-mail and hard copy versions

**Promotion**

Established a member distribution list on email marketing software, designed online news template and developed content.

Created partner distribution list (community-based agencies) and added to email address distribution (350 contacts).

Produced “Partner News” and distributed to email distribution, also produced 2 editions of “Member News” in both electronic format and word document (as requested by [www.4csl.org](http://www.4csl.org) web master).

Worked with members in the development and production of a PSA promoting Code 402, and selected 100 radio stations for distributing the PSA, also completed necessary paperwork for the project.

Drafted for JRC Chair’s signature 2011 Annual Session sponsorship solicitation letters and sent to 19 organizations/businesses agencies