

Troop 152 X-Mas Tree Lot Operation Procedures

The procedures in this handbook describe lot operations with the purpose of:

1. Being able to handle the tree sales efficiently and effectively even during peak times
2. Keeping the lot safe for quests and workers
3. Protecting the investments made in the tree lot, and ensuring maximum profit
4. Adhering to all requirements and regulations associated with operating a tree sales lot

We will have the following discrete roles defined. Each of these roles is responsible for making sure certain aspects of the lot operations are taken care of. At any point of time one or more Scouts / Parents will be assigned to each of the following roles.

1. Lot Manager - Adult
2. Jr. Lot Manager – Scout 14yr & 1st Class
3. Tree Cutter - Adult
4. Delivery – Adult/Scout
5. Door Greeter/Sales Rep - Scout
6. Tree handler – Scout
7. Cashier - Adult

Each lot worker will be provided with a copy of this handbook, or at least the pages describing the relevant role. Training will be provided to all before being assigned to any lot operations.

General notes:

- Jr. Lot Manager will report to the Lot Manager when joining the lot, all other Scouts will report to Jr. Lot Manager for report. All Scouts must notify the Lot Manager when leaving the lot.
- All Adults should interact with Scouts in a positive manner with a focus on mentoring and training them to work.
- Every adult should have received a copy of Troop 152's discipline procedures. If an issue arises, it should be directed first to the SPL, if it cannot be resolved then it should be brought to an ASM (Lot Manager) or Committee member. If it still cannot be resolved the Scout Master then will be made aware of the situation.
- Last but not least: **we are running an actual business, and the money we make is dependent on how we treat our customers!**

LOT MANAGER OVERVIEW - Adult

Role:

- Mentor Scouts in a positive manner, and use the EDGE method in training.
- Must adhere to the BSA Guidelines to Safe Scouting.
- Makes sure that all aspects of the lot are managed well and according to the lot procedures and applicable regulations
- Assigns and re-assigns Scouts / Parents to Tree Lot Roles
- Assist in case of questions / issues, therefore will be able to perform all roles.
- Will step into Tree Cutter position when the assigned Tree Cutter goes on a delivery.
- Will step into and perform any role that is needed.
- Make sure the standing trees water bowls are full
- Make sure stored trees are kept moist and wet
- Make sure Wreaths are gently sprayed with water
- Make sure all string is kept picked up

Responsibilities:

- Before the lot opens
 - o Unlocks and opens gate and trailer.
 - o Meet and walk the lot with Jr. Lot Manager, assign scouts to required roles.
 - o Checks portapotti, and if required assigns workers to sanitize
 - o Make sure power is turned on
 - o Make sure Santa/Snowman blowups are taken up to street.
 - o Keep lot closed until the cashier has received the cash and Laptop and is ready for operation.
 - o Make sure Open sign is out.
- During Lot Operations
 - o Assure each role is staffed appropriately, else re-assign / step in to help
 - o Make sure lot procedures are followed, and intervene in any situation deemed unsafe or inappropriate
 - o Decide to close the lot at the planned time, or earlier when conditions dictate so
- After Lot closes for the day
 - o Get Closing checklist from office, and walk lot with Jr. Lot Manager.
 - o Make sure trees are stored, watered appropriately
 - o Lot looks tidy, free of trash
 - o Cashier has counted cash and treasurer or designated person has left with the cash/Laptop or is stored in trailer in designated place.
 - o Make sure Santa/Snowman blowups are brought back down from street.
 - o Make sure Trash can is outside of gate on **Wednesday nights**.
 - o Make sure all clippings are place in black trailer.
 - o Make sure Closed sign is out.
 - o Dismiss Scouts / Parents
 - o Close and lock trailer
 - o Switch off lights
 - o Close lot

JR. LOT MANAGER OVERVIEW - Scout 14 years & Life

Role:

- Working with the Lot Manager makes sure that all aspects of the lot are managed well and according to the lot procedures
- Assigns and re-assigns Scouts to Tree Lot roles
- Make sure lot procedures are followed by Scouts
- Assigns lunch breaks to Scouts working 8 hours
- Will step into any Scout role that is needed.
- Making sure lot is clean and tidy at all times
- Make sure the standing tree water bowls are full as needed
- Make sure stored trees are kept moist and wet as needed
- Make sure Wreaths are gently sprayed with water as needed
- Make sure all string is kept picked up

Responsibilities:

- Before the lot opens
 - o Meet and walk the lot with Lot Manager, assign scouts to required roles.
 - o When working with Scouts, use the EDGE method while training.
 - o Make sure Santa/Snowman blowups are taken up to street.
 - o Make sure Open sign is out.
 - o Make sure lot is clean and tidy ready for opening
 - o Assign Scout to fill Hot Water container with water
 - o Assign Scout to remove Wreath's from office and place on gate
 - o Make sure the standing trees water bowls are full as needed
 - o Make sure stored trees are kept moist and wet as needed
 - o Make sure Wreaths are gently sprayed with water as needed
 - o Make sure all string is kept picked up
- During Lot Operations
 - o Assure each Scout role is staffed appropriately, else re-assign / step into help
 - o Make sure the standing tree water bowls are full as needed
 - o Make sure stored trees are kept moist and wet as needed
 - o Make sure Wreaths are gently sprayed with water as needed
 - o Lot is clean and looks tidy, free of trash and string
 - o Makes sure lot procedures are followed by Scouts
- After Lot closes for the day
 - o Get Closing checklist from office, and walk lot with Lot Manager.
 - o Make sure the standing tree water bowls are full
 - o Make sure stored trees are kept watered
 - o Lot is clean and looks tidy, free of trash and string
 - o Assist or assign Scout to count cash with Cashier if needed.
 - o Make sure Santa/Snowman blowups are brought back down from street.
 - o Place Wreaths on gate are taken down and placed in Cashier office
 - o Make sure Trash can is outside of gate on **Wednesday nights**.
 - o Make sure all clippings are place in black trailer.
 - o Make sure Scout area is clean and tidy
 - o Make sure Closed sign is out.

TREE CUTTER OVERVIEW – Adult

Role:

- Maintains safe environment within the cutting shed area.
- Process trees per guest requirements

Responsibilities:

- Cut 1” off of tree base using safety protective equipment such as safety goggles, and gloves.
- Drill hole in base of trunk to be placed on stand using safety protective equipment at all times.
- Before tree leaves cutting shed area, be sure to place appropriate size/price tag at top of tree.
- Keep cutting area clean of debris at all times.
- Check drill bit and chainsaw for sharpness as needed.
- Assist with placement of tree stand when customer purchases one, be sure to get tips from appropriate drawer.
- Assist with deliveries when needed or when no Delivery person is not available.

DELIVERY OVERVIEW – Adult/Scout

Role:

- Deliver purchased trees to the residence on delivery form.
- Ensure no damage happens to tree while in transport.

Responsibilities:

- When coming on shift, check in Cashier office to see if any deliveries are scheduled for your shift.
- Collect the delivery forms and prioritize deliveries.
- Ask Jr. Lot Manager what Scout is available to go on deliveries, and gather Scouts to load Truck/Trailer with appropriate tree.
- Google or GPS the delivery location.
- When delivering tree, assist scout with tree.
- Due to liability reasons, do not enter home of delivery, do not place tree in their stand.
- Have customer sign delivery form.
- Return to Christmas Tree lot, turn in Delivery form, and sign delivery log in the White binder.
- Step in as needed for different positions.

DOOR GREETER/SALES REP. OVERVIEW - SCOUT

Role:

- Provide a friendly welcome to guests & direct them to the tree type area in the lot.
- Assist guest with finding their tree, remove tag from tree and direct them to the sales office.
- Is aware of the color coded tree pricing and prices of add-on (bowls, stands, etc.)

Responsibilities:

- Before the Lot opens
 - o Familiarize with the different types of trees, and where they are on display on the lot
 - o Get to know the lot crew and their roles (who is lot manager, jr. lot manager, tree handler)
- During Lot operations
 - o Greet guest with “Welcome to the Troop152 Christmas Tree Lot”
 - o When a guest arrives, ask if they need any assistance or if they pre-ordered a tree.
 1. Yes, to Pre-ordered tree then:
 - Ask what tree they had ordered
 - Tell them “you can still upgrade to a better tree if you would like too” explaining them what better/taller tree we have
 - Point guest to the Cashier’s office
 2. Yes, for assistance, ask then “what tree are you looking for today?”
 3. No, for assistance, tell them “Let me know when you are ready”.
 4. If no response or guest hesitates, show them the trees we sell.
 5. Once they choose a tree, remove the colored tag and them to the cashiers office or assist them to the cashiers office with the colored tag.
 6. While the guest is paying, get the tree handler to get the tree ready for the guest/delivery (tell tree handler if they want the bowl or not, etc.)
 7. When guests leave with their tree OR without a tree, wish them “Merry Christmas, come again”
 8. Step in as needed for other job duties.
- After lot closes for the day
 - o Assist the Jr. Lot Manager with closure activities
 - o Continue to pick up string and water bowls are full

TREE HANDLER OVERVIEW -Scout

Role:

- Maintains the lot to look tidy at all times, and ensures enough trees on display
- Processes trees per guest requirements

Note: only adults can handle chainsaws and the drill.

- Assists in the transportation of tree

Note: only when asked, and we are for liability reasons not assisting in loading trees on cars etc.

Responsibilities:

- Before Lot opens:
 - o Take directions of the Lot Manager to make sure trees are on display, lot looks clean etc.
- During Tree Sales:
 - o Be present in the Lot area at all times, and watch for Lot Manager and Sales Reps needing help with tree handling
 - o When guest picked tree (Sales Rep will let know):
 - Process guest's tree of choice per requirements
 - If quest purchased stand:
 - o Remove display bowl / stand
 - o Cut 1" from tree base
 - Note: only adult can operate chainsaw**
 - o Re-drill tree
 - Note: only an adult can operate the drill**
 - o Replace bowl / stand
 - Else remove bowl / stand
 - If quest ordered fire retardant – get help from a qualified adult
 - If pick up:
 - Take tree to Cashier to meet guest
 - Wait until guest has paid
 - Offer guest twine to tie tree
 - Transport tree to car
 - Note: customer is responsible once tree leaves the lot, do not load tree on the vehicle.**
 - If delivery:
 - Wait until guest has paid
 - Receive Delivery Slip from Cashier and attach to tree
 - Transport tree to Delivery Lot
 - Wish guest 'Merry Christmas, come again'
 - o When directed / permitted by the Lot Manager, add more trees on display
 - Get tree from the storage
 - Take tree to Tree cutter, Tree cutter will cut and drill tree and place stand/water bowl on tree
 - Place tree in appropriate are

- Cut all string and throw in trash
 - Add water
 - Be ready to jump into another job if needed.
- After the Lot closes:
 - Take directions of the Lot Manager to make sure trees are on display, lot looks clean etc.

CASHIER OVERVIEW - Adult

Role:

- Completes all Sales, Pre-sales, Deliveries
- Handles Credit Card, Check and Cash transactions
- Answers lot phone in a respectful and professional manner and checks voice mail line for any messages.
- Responsible for scheduling and completing Delivery form.
- Counts cash, check, and credit card transaction and reconciles at the end of the shift.
- **Note: Cashiering is a big responsibility, as you are dealing with Troop finances. This role requires and adult or adult supervision at all times. In case of questions DO NOT hesitate to ask a CTL Committee member.**

Responsibilities:

- **First Shift** - Before Lot opens
 - o Unzip office door.
 - o Uncover the desk, fold sheets and place them out of the way.
 - o Receive the cash bag from the designated person, count and distribute cash and change appropriately in register tray.
 - o Make sure power is on to office area.
 - o Receive the Laptop from the designated person. Turn on the computer and printer. To Log on to the computer **troop152**, and for Quickbooks **log on as Cashiers, Password is troop152.**
 - o Check voice mail for messages. Pick up receiver and hit *99, the messages will play from there. Pass messages on to the appropriate person.
 - o Check White Delivery book and pull deliveries for your shift. If Delivery person is not scheduled, but there is someone signed up as on-call, please call them and let them know there are deliveries.
 - o Check Schedule to see who is expected for the shift.
 - o Start Popcorn, get Scouts to fill water to start heating for Hot Chocolate.
 - o Prepare office for opening, no Scout should do this.
 - o **Note: the cash tray shall not be left unattended at any time**
- As Time Permits or As Required Throughout the Day-
 - o There will be another small bag of a small amount of change on the lot during business hours. If Cashier finds he/she needs additional change, you will need to purchase your change from this bag. If you need a roll of quarters, you will need to take \$10 from your register and purchase the change for the register.
 - The purchase of change would be as follows: \$10/Quarters, \$5/Dimes, \$2/Nickels, \$0.50/Pennies.
- When guest arrives to check out:
 - o Ask "How did you Hear about us?"
 - o **If pre-ordered tree**
 - Light Green Pre-Sale binder, alphabetical pull their Pre-Paid invoice from binder.

- If they take what they ordered, there is no change needed to invoice, except **write Picked Up with date on the invoice and place Pre-sale Invoice in black tray.**
- If they want to upgrade you will need to adjust their original invoice. You must zero out quantity from original purchase, and enter new tree in next row. The invoice will show the difference owed. Process payment as indicated.
- If they want their tree delivered:
 - Pull White Delivery binder and pull a blank Delivery form from binder, have the customer fill –out.
 - Schedule the delivery and log on list.
 - Place filled out delivery form under appropriate delivery day in White binder.
 - Obtain Orange Sold Tag, fill out Customer Name and Delivery Date. Mark with or without tree stand. Make sure it gets placed on appropriate tree.
- If not pre-ordered
 - Process customer information and create invoice in Laptop computer in Quickbooks.
 - Accept cash, check or credit card payment
 - If check
 - Checks to be made payable to “BSA Troop 152”. Please if guest leaves payee line blank, ask guest to complete
 - Make sure Telephone number and Driver’s License are on check.
 - Checks will go below the bottom of the cash tray
 - If cash
 - Make appropriate change to the guest
 - If credit card process as indicated on Laptop Computer.
 - If delivery:
 - Pull White Delivery binder and pull a blank Delivery form from binder, have the customer fill –out.
 - Schedule the delivery and log on list.
 - Place filled out delivery form under appropriate delivery day in White binder.
 - Obtain Orange Sold Tag, fill out Customer Name and Delivery Date. Mark with or without tree stand. Make sure it gets placed on appropriate tree.
- **Thank guest for their support of Troop 152**
- **Wish guest ‘Merry Christmas, come again’**
- **Middle Shift**
 - Get brief report from First Shift Cashier.
 - Check Schedule to see who is expected.
 - Continue to process Customers the same as the First Shift.

- Check White Delivery book and pull deliveries for your shift. If Delivery person is not scheduled, but there is someone signed up as on-call, please call them and let them know there are deliveries.
- Continue to make sure Popcorn and Hot Chocolate is ready for customers.
- **Last Shift** – Closing shift
 - Get brief report from Middle Shift Cashier, check schedule to see who is expected.
 - Continue to process Customers the same as the Middle Shift.
 - Check White Delivery book and pull deliveries for your shift. If Delivery person is not scheduled, but there is someone signed up as on-call, please call them and let them know there are deliveries.
 - Continue to make sure Popcorn and Hot Chocolate is ready for customers.
 - Last cashier will remove all money and checks from register, depositing in cash bag. That bag will contain a cash count sheet and a tie wrap to “lock” the bag after the counting has been completed. Make sure to check under the coin tray for extra bills or checks, and the register is empty.
 - Collect all sheets from **Black tray**, take into trailer with cash bag, and the extra cash bag.
 - Last cashier and at least one other adult or responsible Scout will take the received cash and checks to the trailer on the lot.
 - The bills and change will then be counted by denomination and recorded on the cash count sheet (which will be in the cash bag). You do not need to count the total dollars, just the number of ten dollar bills there are, how many quarters, etc., and record. Each of the two counters will count the denominations. If they arrive at two different answers for a denomination, they will count again for accuracy. Once all answers agree with both signers, they will sign off at the top of the form.
 - One counter (not the treasurer) will audit that all checks are payable to “BSA Troop 152”. If they are not, this shall be corrected on the payable line of the check.
 - The number of checks received shall be recorded on the appropriate line on the cash count sheet.
 - Departing cashier will then return the money and the cash count sheet to the cash bag, “lock” it with a zip tie provided in bag, and put in designated area inside sales trailer, or it will be picked up by the treasurer or someone designated by the treasurer.
 - These cash handling procedures will be conducted at the last shift of cashiers.**
 - Make sure computer is powered down, placed in the computer bag. This will be put in a designated area inside the trailer, or it will be picked up by the treasurer or someone designated by the treasurer.
 - Make sure Scouts empty left over water, and popcorn machine is clean and ready to go for the next day.
 - Make sure desk is covered with sheets, the heater is unplugged, power is turned off to the office.
 - Zip door down.