

BY: DON MEYER

10/29/2018

Table of Contents

- Swap Leaders Message
- Manage Swap
- Manage Money and Cashiers
- Inventory Problems & Customer Help
- Security
- Volunteers
- Volunteer Food
- Inventory and Invoicing Systems
- Setup Swap Facility
- Check-In Individuals
- Check-In Shops
- Arrange (and Move) Inventory
- Technical Help
- Cashiers
- Check-out Individuals
- Take Down Swap Facility

Swap Leaders Message: [top]

This is just a guide - not a rule book - there will be situations that will require you to work with the Volunteer Coordinator and other Swap Leadership. Some volunteers listed may not show up, others will stay much longer than they signed up for and some will come that are not on the volunteer list. The number of people suggested for each position may be too many or too little at any given time so let the volunteer coordinator know. When in doubt, ask!

Leadership has the following responsibilities:

- 1. **Manage the team** Keep the team on task. The swap is so fast and intensive, once behind, catching up will take hours. Have the correct number of people required to do the job. At times you may have too many, make them available to the Volunteer desk. If you do not have enough, talk to the Volunteer desk to get more.
- 2. **Quality Control** Each job has an effect on how well the inventory and money is managed. Our goal is to ensure that: 1) the owner receives a check all of their sold items and all unsold items are returned. 2) The customer can buy the items they desire -- this requires all items have the right inventory tag.
- 3. **Training** -Learn the position from the job description, the Swap Chair and/or the person that preceded you. This is a key part of the job because your job also includes training and guiding your team and successor.
- 4. **Track the group** Know who your people are, make sure they are signed in and out and are doing the work assigned. Do not overdo it, these are volunteers, give breaks as needed.
- 5. **Suggest/Implement Improvements** Document the things that could be improved next year (or even this year if possible) including the actual number of people needed so that we are accurate continuously improve.
- 6. **Each job is important** Sometimes there is not enough or too much work. Retail sales has it's up and down cycles. The hard part typically is dealing with the customers, the challenges, and the volume of business in 4 days. We will handle hundreds of items an hour. During the sale, we will sell \$10-40,000 of gear an hour. When the sale is over, we have just hours to account for all of the inventory in and out, return all of the unsold items and then a week to write and mail checks for all of the goods sold.
- 7. **Quality is job ONE!** A little inventory tagging issue up front could cause hours of work resolving it after the swap. Losing part or all of a sold tag causes hours of issue resolution and unhappy customers. Charging customers too much or too little is painful for them and us.
- 8. **Security Everyone** must pay attention not just the security staff. If you notice something not quite right, get the leadership, security team and police officer involved. Better to be a false alarm than to lose goods and money, a \$10 loss takes \$40 in additional sales to break even.

Thank you in advance for your assistance. Your help will lead directly to a significant amount of money being made available to enhance our Newport students' education.

Don Meyer, Swap Chairman

This page intentional left blank

Manage Swap [top]

Organizing the Swap

- Organizes the entire swap preparation, operation and conclusion
- Gets leaders from past swaps and through the Newport PTSA leadership
- Provides support to all of the Swap Leaders. The buck stops here.
- Understand ALL processes and areas of responsibility
- Provide Training as necessary to Swap Leadership and Volunteers
- Watches for and corrects Quality issues as they occur
- Help customers resolve issues
- Make decisions as necessary to resolve problems
- Documents any changes to the swap process
 - Provide this Training Package to the Help Desk
- Provide Information
 - Provide Gym Floor Layouts
 - o Provide Check-in, Cash, Set-up and other instructions
 - o Provide other useful information (like Ski Boot Sizing Guide)
 - o Provide signs ski, boots, snowboard sizes, All Sales Final, Entry, Exit, etc.
- Provide Hard Goods
 - o Have School District deliver appropriate number of tables and stages to place inventory on
 - Deliver and build the clothing, ski and snowboard racks, floor covering
 - Have the school provide garbage cans, tables and chairs
 - Provide a Dressing Room
 - Provide various tools and supplies to build ski and snowboard racks
 - Provide Supplies inventory tags, rubber bands, zip ties, string, screws, tape, pens, staplers, scissors, etc.

Advertising

- The Swap Chairman coordinates these activities and does the primary advertising.
- Free Internet advertising. Feel free to link to the Swap web site from your favorite web sites.
 - Newspapers, Magazines, Radio Stations, TV Stations, Workout Facilities, Cities, Schools, and many others have community event web pages.
 - These need to be found and information entered about the swap. Usually it is just a paragraph or fields covering the what, when, where, who info and a "for more info" web link to https://skiswap.info or https://skiswap.info or https://skiswap.info
- Free school district and district PSTA Web sites and Newsletters.
- Paid advertising if desired in the local Newspapers and Sports Magazines
- Street Signs 50 or 100 signs
 - They are the most visible and key means of advertising. Thousands of people see these.
 - These get placed on roadsides around the Bellevue area Plastic cardboard and wire stakes.
 - They go out 2 weeks before the swap and get picked up the day after the swap.
 Not Allowed at all in Issaguah and other locales

Inventory Problems & Customer Help [top]

- Focal point for inventory and customer issues.
- Work issues with other Swap Leadership (Cashiers, Inventory Arrangers, Check-in, Check-out, etc.)
- Resolve issues with customers and swap volunteers
- Work with vendors to price items without a tag
- Direct problems as necessary to those responsible for the inventory areas (skis, snowboards, ski boots, snowboard boots, clothing, underwear, hats, goggles, helmets, miscellaneous)
- Reconnect lost tags with gear
- Look for and correct issues accumulating junk or partially eaten food and drink, young volunteers causing problems and not doing the work, kids out of control, custodian support, etcetera.

Help Desk

- Focal Point for Problem Mgt always someone there
- DOCUMENT all problems/resolutions in Problem Log notebook at the Help Desk
- Maintain shops & individuals separated tags boxes
- Have closed area for inventory without tags
- Get vendors to look at the items without tags and tag box as necessary

After Individual Check-Out

- Separate and move donated, unclaimed items, and garbage items to designated spots
 - o Skis, snowboards, ski boots, snowboard boots, jackets, pants, hats, gloves, etc.
 - Determine which items are garbage
- Inventory the donated items, unclaimed items, and garbage items using a PC and barcode reader

Manage Money and Cashiers (PTSA and Swap Treasurers)

[top]

Pre-Sale

- Provide Starter Cash for Cashiers and First Tracks
- Write Checks for Pre-Swap Expenses
- Arrange for Credit Service

<u>Sale</u>

- Train & Manage Cashier Leaders
- Write checks (or supply cash) for supplies as necessary
- Continually verify Sales Receipts for accuracy
- Maintain Quality Control
- Manage money, checks, credit
- Document income, expenses, and deposits
- Deposit money regularly
- Resolve payment errors

Calculate and deliver checks

- · Verify inventory sold totals
- Write and mail checks
- Calculate preliminary swap totals and statistics
- Provide Vendor Summary of Items Sold with Checks and Summary
- Close books

Manage Security [top]

During Gear Check-in, Sales and Check-out

- One person on each potential exit point. See Swap Layout
- 1-2 people for relief and general security walking around.
- Pay particular attention to any goods going out rather than in during Shop and Individual Check In. Talk with Shop personnel to get them to also pay attention to gear going the wrong way.
- People covering all exit points, exiting the cashiers and 2-3 people for relief and general security walking around.
- Nobody and Nothing goes out the South-East Entry door & north and southwest No EXIT doors.
- Work with the Bellevue Police Officer at the Swap

Entry Door - NorthEast

- NO EXIT sign above door on the inside and ENTRY signs guiding people to the door on the outside
- Manage the customer survey ensuring that 5-10% of the customers get surveyed at all times.
- 2 people to survey people coming in and to keep goods from going out
- ONLY EXIT DOOR However, allow parents with kids out who need the restroom
 - watch people exiting wearing our jackets, hats and other gear.
- On Saturday morning early, the Shops may bring in additional gear begins via the south and North Entry doors.

NO EXIT or Entry Doors

- NO ENTRY signs on the outside of the main and outside gyms doors.
- NO EXIT, PERIOD on any outside door!

Cashier Line Exit

• Check inventory sales slips against equipment as customers exit (like Costco) to keep people from leaving with unpaid items.

Floating Security

- Watch the floor for suspicious activity such removing or putting on tags. If they are putting a
 tag back on which has fallen off, check to see if it is the correct item or bring it to the HELP DESK.
- Watch for people wearing merchandise.
- Check the movement of gear from the check-in area to the sale area

Coordinate Volunteers [top] ·

Pre-Sale

- Work with the Swap leader to identify how many volunteers are needed when
- Setup the Volunteer Spreadsheet to account for all volunteers
- Arrange Volunteer Help desk volunteers and a PC
- Ensure that all volunteers check in and remind volunteers to check out

During the Sale

- Check volunteers in and out; both adults & students should SIGN IN.
- ENSURE that all Leaders get their Job Descriptions and that they bring them back with corrections and suggestions
- Record Check In/Out on Volunteer List /spreadsheet
- Balance work assignments based on NO SHOWS and current leadership needs
- Direct volunteers to their Leaders and assignments: know who the Leaders are and take pictures on your phone for a visual
- When students finish their shift, confirm their hours
- · Confirm next day shift times for volunteers planning to help on the next day
- Recruit volunteers for next day open positions add their name & phone to the next day Volunteer List
- Document changes required for next year More or less people, change to Job Descriptions

After the Sale

- Finalize the volunteer list for the next year's plan
- Ensure that Volunteers checkout at the Volunteer Desk
- Check our list and sign off on volunteers on the official student volunteer system
- Provide updated volunteer spreadsheet to the Swap Leader

Coordinate Volunteer Food [top]

Pre-Swap

- Work with Swap Leader to plan for how much food is needed and when
- · Arrange for all food ahead of time
- Work with area food establishments to get food donated
- Work with school clubs and teams to get time and food donations
- Manage food donations via SignUpGenius for volunteered food and drink
 Individuals register via the Swap website, https://NewportSkiSWap.com, click Volunteers

During the Swap

- Individuals will bring the food to the Swap's Food Area
- Food coordinators (or representative) picks up and delivers food several times during the day
- Food coordinators manage distribution of food
- Food coordinators provide meal notices to swap leaders and shop leaders

After the Swap

Provide a summary Food Report to assist next year's coordinator

Manage & Support Inventory and Computer Systems [top]

Setup Inventory System

Before the Swap

- Prepare the online system to accept individual gear registration
- Test use of registration at the school with school equipment
- Load the Shop's Inventory provided on spreadsheets and verify the barcode uniqueness
- Work with the PTSA Board to connect to the banking system and test the capability
- Pre-Print labels, stick on tags, sort and group tags by seller name

At the Swap

- Provide preprinted tags to Check-In Manager.
- Setup the inventory management area/tables
- Setup PCs for individual sellers who do not pre-register gear
- Setup PCs and printers for Cashiers

Run the Inventory System

Individual Check-In

- Help sellers as necessary use the online registration
- Print the barcodes, stick on inventory tags and provide tags to Check-In Leader (or assistant)

During Sale

- Work with Swap Customer Help as necessary to resolve lost gear tag issues including potentially printing new tags
- Support Cashier PCs as necessary

Individual Payment Info

- On Saturday, provide QuickBooks load file for individual sellers who had all of their gear sold.
- On Sunday, provide load file for QuickBooks with all individual sellers' sold gear total.
- Provide additional feeds as inventory issues are resolved

During swap Unsold gear Pick-Up

- Provide Unsold gear by Seller Sheets
- Work with Swap Customer Help leaders to resolve gear with no tag issues

Close the Inventory System

After the Swap Closes

- Work with Swap and PTSA Leadership to keep the inventory and invoice status up to date as inventory issues are resolved after the swap.
- Provide check data feeds for QuickBooks as necessary.
- Provide swap summaries for gear and invoicing

Setup Swap Facilities [top]

Layout - See floor layout diagrams

- Set up tables, stages, dividers, chairs, signs, etc.
 - Setup Cashier area (see floor layout)
 - Setup Individual Check-in area
 - Setup Sales Area
 - Setup staging area(s) for checked in equipment
- Setup Ski and Snowboard Racks the day before at school)
- Setup clothes racks
- Setup the dressing room (plastic pipe and sheets)
- Place Ski, Snowboard, Boot and Clothing Sizing signs
- Document any changes to the layout when finished with setup

Supplies (see inventory list for additional detail)

- From Bellevue School District Warehouse, Stages & Tables
- · From Newport,
 - Cafeteria Tables
 - o Chairs
 - Rolling garbage cans (for moving gear from Check-In area to sales floor)
 - o Big garbage cans for garbage and for poles (basket up)
- From Swap Leader
 - Boards to build ski & snowboard racks
 - Clothing racks
 - Signs for inventory, entry, exit, etcetera
 - Floor Layout diagrams
 - Setup Instructions
 - o Supplies
 - Tools

Check-In Individuals [top]

Responsibilities and tasks of Leaders

- Ensure that Check-In leaders and workers are properly trained, if not, call a quick time-out training session to train/re-train the volunteers
 - Have correctly tagged and tied or taped inventory items to show them
 - o Make Tagging instructions available, have new volunteers read it
- Ensure that tags are appropriately tied or taped to inventory
- Ensure that enough volunteers are available work with volunteer coordinator
- Have signs and someone to direct the customers to available tables/checkers
- Ensure that enough supplies are available rubber bands, zip ties, strings, tape, instructions
- Move checked-in items from the "check-in" tables in a secure check-in staging area
- Work with Inventory Arrangers/Movers to move items to their designated areas in the gyms

Responsibilities & tasks of Individual Consignees

- Fill out inventory registration online
- Verify tags are on the right gear
- Return on Sunday to pickup unsold items

Responsibilities of Check-in Volunteers

- Ensure that all tags are securely fastened with appropriate tape or zip ties
- Ensure that tags on skis and snowboards are right side up on the tip
- Boots are tied together with an 18" string so people can try them on and still walk
- Remind Sellers of the pickup time and if they don't pick it up we will dispose of it!
- Move sale items from customer check-in table to the "checked-in" staging area
 - o Make sure tagged and untagged items do not get mixed up
 - Keep types of items in separate piles
- Check with Technical Help as necessary
 - Help customers with pricing
 - o If the merchandise appears unserviceable (old, ugly, broken) check with the Technical Help

**Improperly tagged items cost us money! The entire process starts and ends with the barcoded tags. The gear and tags must match. They must be well connected. We have 4-5 people working 12 hours each during the sale reconnecting tags and items. We put in another 100+ hours after the swap trying to reconcile payment issues. Please help reduce this by ensuring that the tagging is done well.

Check-In Shops [top]

Shops must:

- Have pre-registered with the Swap Chair prior to arriving (if not they must see the Swap Leader)
- Signed the Ski Swap Contract prior to starting Check-in (if they haven't already)
- Have Inventory Tags which clearly identify the store (and Clearly different than any other shop)
- Have all inventory properly tagged and priced prior to arriving (or at bringing into the gym)
- Provide sample of ALL of their tags to Help/Problems Leader
- Immediately contact the Swap Chair if any of the above is not true!

Shop Check-In

- Swap Chair will schedule Vendor arrival time and provide a list with Shop, Estimated Arrival Time,
 Owner, Sales People and an estimate of the number of items.
- Help/Problems Leaders will do the initial check-in of the Ski/Snowboard Shops to ensure that they have registered and that their gear is well tagged.
- Help/Problems Leader hand-off the actual movement of gear into the gym to the Arrange Inventory Leader
- Help/Problems Leaders will ensure that the Store's Tags are clearly identifiable (same type/color/marking of tag)
- Ensure that all tags are fastened securely (if tags are flimsy, tape all tags)

Arrange (and Move) Inventory [top]

- The leaders are in charge of training and ensuring that things are done properly
- Get to know the ski and snowboard shop employees (Technical Help) in your area!

Individual Check-in - Moving the gear

- Arrange Inventory Leader is in charge of moving inventory from check-in staging area to sale area
 - use rolling garbage cans and carts for moving inventory
 - o put like items and sizes together before moving the inventory to the gym
- Ensure that only items with properly filled out attached tags go out on the floor!
 - Improper tagging causes dozens of hours of rework during and after the swap and also cause the loss of a lot of profit (over \$1500 each year)
- Move items to designated areas (skis/boards, boots, poles, accessories, clothes, etc.)
- Ensure tags are still attached well after moving
- Work with leader in charge of arranging each major inventory type:
 - boots/bindings/poles, skis/snowboards, clothing, helmets, underwear, bags, wax, goggles, etcetera

Shop Check-In - Moving the gear

- Arrange Inventory Leader will work with Volunteer Desk to get volunteers
- · Arrange Inventory Leader will work with Help/Problems Leader if quality problems are detected
- Arrange Inventory Leaders will direct placement of gear and provide volunteers with the layout so it is arranged out by type and size

Arranging the gear

- One Leader in charge of arranging inventory for each type of Gear: boots/bindings/poles, skis/snowboards, clothing, helmets, underwear, bags, wax, goggles
- Arrange items within the areas (see floor layout) by size: skis, snowboards [little to big], boots [men, women, children by size], clothes [men, women, children by size]
- Keep the inventory neat and orderly at all times
- If there are quantities of the same item and size, store some under the tables so more brands, sizes, etc. are visible to the customers.
- As the inventory goes out, pull duplicates out from under tables and spread out remaining items for better visibility
- Look for and correct problems; like skis about to tip over or items falling off tables
- Watch for tags about to come off, tags on the floor, and items with no tags. Volunteers should carry tape and ties to fix or re-attach tags.
 - Items without tags cannot be sold making customers and sellers unhappy (and we lose income)
- If an item and its corresponding inventory tag are separated, try to get them back together.
 - o The Help desk will also be bringing you items or tags that have been separated.
- Tags or items which can't be matched must be brought to the Help desk

Work with HELP DESK to resolve problems!

After Sale

- Help the shops find, organize and move their items back to their vehicles
 - o 2 4 people (depending on volume) per vendor to help find and collect unsold items
 - o 2 8 people (depending on volume) per vendor to help move the inventory to their vehicles
- Ensure that Shops are only removing their own gear

Before Individuals pick up their

 When shop inventory is gone, organize the remaining gear so that it is easy to find for individual pickup

After Individuals have picked up their inventory

- Inventory all remaining items by type Make separate lists for unclaimed and donated items
 - o Skis, snowboards, ski boots, snowboard boots, jackets, pants, hats, gloves, etc.
- Separate and box Shop gear left behind
- Separate donated and unclaimed items to designated spots
- Move remaining gear to a designated storage unit/garage

Technical Help [top]

During Sale

- Help customers find appropriate gear
- Help keep the inventory in good order
- Talk with Inventory Arrangement Leaders and/or Help-Problems Desk when inventory is getting out of control

Cashiers [top]

Head Cashier

- Ensure that the Invoices close out, as required to transfer money to treasurer
- Separate cash, credit, check stations
- Regularly check Cashiers to ensure that gear is scanned and invoiced properly
- Ensure that customers Invoices and Payments are made

Cashier - Scan Inventory Tags and Take Payment - 1-2 people

- 1. Customer provide gear 1 item at a time
- 2. Inventory scanning person Starts an invoice
- 3. Inventory scanning person scans all items
- 4. Cashier person gets the total from the inventory scanning person (and/or monitor)
- 5. Cashier person processes the credit, cash or check
- 6. Inventory scanning person pushes Finish/Paid button
- 7. Cashier person gets and provides the inventory purchased receipt from printer / printer person This provides the final "sale is complete and paid for" check and the customer can move on
- 8. Security checks inventory against inventory slip
- 9. Customer Happy (waited in line less than 15 minutes) goes home

Potential Problems

- Get Head Cashier or Help-Problem Management to help if:
 - o There is an Unknown Tag, No Tag, 2 Tags, tag that will not scan
 - o Inventory tag attached to store tag with another price
 - Inventory Item and Tag do not match

Check-Out Individuals [top]

Customer Check-out Tables

- Inventory Management System will provide the Unsold Inventory Sheets on demand
- Customers should have printed their own

Swap Take-down

• Swap Take-down volunteers will remove all unnecessary racks and tables and boxes

Arrange & Check-Out Inventory

Arrange and Move volunteers will neatly arrange gear by type on the floor

Help individuals find equipment

- · Customers will find and claim unsold items
- · Volunteers will help customers who can't find their unsold items
- Volunteers will help customers get the unsold items to the Check-Out desk
- Send customers with inventory problems to the HELP Desk who can look up the gear

Check individuals' inventory as they exit

- At the checkout door, Inventory System volunteers will scan the inventory tag and verify the seller
- Check-out Mgt will document any missing inventory issues

Inventory Problems

- Inventory Problem Mgt will solve the problem on the spot if possible
- Document the person's name, phone number, email address and problem inventory number(s)

Take Down Swap Facility [top]

Sunday, 8-3

- Fold & move all unneeded tables, chairs and clothes racks to their temporary or permanent storage locations
- Breakdown and move all ski and snowboard racks/stands to the storage container
- Breakdown and move the clothes racks to the storage container
- Break down all boxes and work with Custodians to move to recycle area
- Put garbage in trash cans
- Remove extra floor covering

Individual Check-Out - 10:00-2:00

Help setup tables in the check-out area (see facility layout)

After Check-Out

- · Fold & stack all remaining tables and chairs
- Sweep floor covers
- Properly fold and move the Newport floor covering the storage room
- Fold and move the swap floor covering to the storage container

Pack and move Supplies, gear and racks

- Collect, organize and pack swap supplies for next year's sale
- Move swap remains to the swap storage container
 - Carpets and runners
 - Boards, supplies and tools
 - Unclaimed and donated gear
- Move tools to the Swap Leader's vehicle

Cleanup

- Sweep floor
- Put garbage in trash cans
- Move garbage to the school garbage bin
- Finish cleaning gym all swap stuff gone, floor in reasonable condition

[top]