

# COOKIE SALES

Service Unit Manager  
Guidelines and Procedures 2009



## FORWARD

Thank you for organizing program sales activities for Girl Scouts. Girl Scout adults work together for girls, and your commitment ensures that the money earned through program sales is well managed, and supports the Girl Scout program - for "every girl, everywhere."

This guide provides detailed information and instructions for you to carry out your responsibilities. Call your membership director or Chris Carlson at the Lisle Regional Service Center with any questions you may have.

Here are a few tips to help you have a positive volunteer experience:

- ✓ Attend the kickoff meeting organized by the Girl Scout council. You will receive information, materials and instructions to carry out your responsibilities.
- ✓ Follow directions carefully. If you need more direction call a member of the Program Sales Team or the Lisle Regional Service Center.
- ✓ Follow the schedule of events to keep you on track. Be on time – Be accurate
- ✓ Remind troop managers and leaders that you are adults working together for Girl Scouts.
- ✓ Do what you can to make their job easier. It will inevitably make your job easier!
- ✓ Emphasize the importance of keeping scheduled appointments and deadlines
- ✓ Make special arrangements for those with special circumstances when possible.

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Girl Scouts off Greater Chicago and  
Northwest Indiana  
Lisle Regional Service Center  
2400 Ogden Ave., Suite 400  
Lisle, IL 60532-3933  
T 630 544-5900 F 630 544-5999  
[www.girlscoutspw.org](http://www.girlscoutspw.org)

## Volunteer Position Description Service Unit Manager

### **FUNCTION:**

Manage and coordinate program sales for a specific service unit. Provide support and information to troop program sales managers

### **TERM:**

Appointed annually by the Service Unit director

### **ACCOUNTABILITY:**

Reports to the council Program Sales Manager

### **PREREQUISITE:**

Must be a Girl Scout member in the current program year with no outstanding debt to the Girl Scout council

### **UNIVERSAL ACCOUNTABILITIES**

- Demonstrates sound judgment and responsible decision making and ensures that the Girl Scout mission and the goals drive all decisions
- Models behavior consistent with the mission and purpose of Girl Scouting.
- Supports and commits to the Girl Scouts - Prairie Winds and Girl Scouts of the USA affirmative action plans and to increasing diversity throughout the organization
- Supports, promotes and participates in all efforts to increase cooperation, communication and collaboration between and among Service Unit volunteers and the staff
- Understands the importance of seeking resolution to problems and concerns by bringing them to the direct attention of your supervisor in a timely manner.
- Promotes a climate of courtesy and professionalism toward all volunteers served by this council, the Board of Directors, staff and the communities we serve.
- Ensures that materials prepared and produced for Girl Scouts - Prairie Winds reflect the highest standards of excellence, brand management, and relevance and are designed to reduce rather than create bureaucracy.
- Participates in the delivery of the Girl Scout program by providing service and information to girls, administrative volunteers and the council staff as determined by your supervisor.
- Demonstrates sound time management by effective and efficient organizing, prioritizing and completion of multiple assignments in a timely manner.
- Consistently strives to improve the effectiveness and efficiency of your job by demonstrating positive and creative approaches to the delivery of services to girls.
- Maintains strict confidentiality when handling sensitive or privileged information.
- Refers questions and inquiries to the appropriate person immediately.
- Shows a willingness to work with diverse groups with varying life styles and cultures.
- Has no outstanding debt to the Girl Scouts.

## **PROGRAM SALES TEAM - POSITIONS:**

### *Communications Coordinator*

- Registers on the order entry system as the Service Unit Manager
  - ✓ Approves troop managers
  - ✓ Monitors troop orders and ordering activity
- Support the troop volunteers
- Keep volunteers updated with new or changed information
- Collects deposit slips from troops
- Distributes incentives and patches upon receipt of final deposit slips

### *Delivery Coordinator*

- Organize product delivery to program sales managers
- Recruit an adequate number of volunteers to facilitate troop order delivery in an organized and timely manner

### *Booth Sales Coordinator*

- Organize the cookie booth sale
- Obtains permission/approval from the merchants – follow up with merchants
- Compiles the final merchant site list
- Prepares the approved site sign up schedule

- Facilitates a site sign up meeting
- Prepares the final schedule and submits it to the council

## **GENERAL DUTIES AND RESPONSIBILITIES:**

1. Attend the training provided by the council.
2. Generate enthusiasm for the program. Assist with council or Service Unit events.
3. Assist with program publicity within the community.
4. Be available to and provide support to leaders and program sales managers for the duration of the program.

## **QUALIFICATIONS:**

1. Enthusiasm and willingness to give adequate time to ensure accuracy and success to the program
2. Support Girl Scouts - Prairie Winds.
3. Ability to work with girls and adults.
4. Be a flexible and reliable individual.
5. Ability to keep accurate and complete records
6. Demonstrate respect for all people.
7. Be a current Girl Scout member.

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## GENERAL INFORMATION

Council official name: Girl Scouts of Greater Chicago and Northwest Indiana  
Address: 2400 Ogden Avenue, Suite 400, Lisle, IL 60532-3933  
Business Hours: Mon-Fri, 9 a.m. - 5 p.m. (Closed Saturdays and Sundays)  
Program Sales Contact: Christine Keyser, Program Sales Mgr.  
Contact Phone: (630) 544-5975  
Contact fax: (630) 544-5999  
Contact e-mail address: [CKeyser@girlscoutsgcnwi.org](mailto:CKeyser@girlscoutsgcnwi.org)  
Council Website: [www.girlscoutsgcnwi.org](http://www.girlscoutsgcnwi.org)

### **Service Unit Information:**

Service Unit Name: \_\_\_\_\_  
Service Unit Director (SUD) Name: \_\_\_\_\_  
SUD Daytime Phone: ( \_\_\_\_\_ ) \_\_\_\_\_  
SUD Cell Phone: ( \_\_\_\_\_ ) \_\_\_\_\_  
SUD E-Mail: \_\_\_\_\_ @ \_\_\_\_\_ . \_\_\_\_\_

### **Council Staff Information:**

Membership Manager (MM) Name: \_\_\_\_\_  
MM Phone: ( 630 ) 544 - \_\_\_\_\_  
MM E-Mail: \_\_\_\_\_ @girlscoutsgcnwi.org

# PREPARING FOR YOUR SALE

## Step 1: September or October

- Locate a meeting site. This site should be able to accommodate 100 volunteers
- ✓ Schedule it during the first 3 weeks of January
- Have enough tables and chairs

## Step 2: November

- ✓ Announce the location, date and time of the site sign up meeting.
- ✓ Ask how many troops intend to participate in the booth sale. This is necessary to insure you have enough sites and times available on the schedule.

## Step 3: December

- ✓ Complete your merchant site list.
- ✓ A good cookie booth site:
  - Is safe for the girls
  - Has good visibility
  - Gets lots of "foot traffic" from local shoppers
- ✓ A copy of the list compiled last year can be e-mailed to you. Call the Lisle Regional Service Center.
- ✓ Leaders and managers may suggest other sites to be included on the list. – but may not make their own arrangements
- ✓ Booth cookie sites must be within Girl Scouts of Greater Chicago and Northwest Indiana jurisdiction. Sites located outside of the council's boundaries are not acceptable and will not be approved under any circumstances
- ✓ Check with the Lisle Regional Service Center to insure the site is acceptable, then contact the merchant and get approval
- ✓ If the merchant approves the site, add the information to the site list and schedule. Make sure you document the name and telephone number of the person who gave you approval.
  - Special Sites. The definition of a "special site" is one where all troops would not be allowed to sell there. For example, churches or a parent's workplace (that is not retail). Prior approval must be secured from the Lisle Regional Service Center before any arrangements are made at special sites.

## Step 4: January

- ✓ Prepare the master site schedule Type in the names of all approved merchant sites on the computer format
  - Block out any dates or times that are not approved by the merchant. For example, if you use a bank, get the bank's hours of business and block out the hours they are closed.
  - Print the pages for each date
  - Facilitate the site sign up meeting

- Send the schedule to the Lisle Regional Service Center via e-mail (as an attachment)

## Signing up for Booth Cookie sites

Each troop must record their selections each time they sign up on the schedule

- ✓ Type all troop entries on the computer master site schedule file
- ✓ E-Mail the file to [CKeyser@Girlscoutsgcnwi.org](mailto:CKeyser@Girlscoutsgcnwi.org) as soon as possible. Service unit teams may not alter the schedule once it has been sent to the Lisle Regional Service Center.
- ✓ The Lisle Regional Service Center will compile a master booth sale schedule and will post it on the website.
- ✓ Troops that want more dates and times, or need to make a change must e-mail [CKeyser@Girlscoutsgcnwi.org](mailto:CKeyser@Girlscoutsgcnwi.org) with their request. The troop will be sent a confirmation via reply e-mail. Telephone requests will not be accepted.

## Booth Sale Rules

The following booth sale rules apply to all Girl Scouts participating in the booth cookie sale. Cookie booths are attended by 1 adult volunteer and no more than 2 Girl Scouts. Schedule girls and adults to insure coverage for the entire timeslot

Girl Scouts and all adult volunteers must:

- ✓ Be trained and obey all rules
- ✓ Be on their best behavior at all times
- ✓ Have an organized display at the cookie booth
- ✓ Must wear their vests or sashes, or their Girl Scout membership pin
- ✓ Check the website to insure site assignments are posted correctly. The website schedule will be the deciding factor in any site discrepancies
- ✓ Not make their own site arrangements
- ✓ Stay at the cookie booth and not wander about the premises.
- ✓ Be at least 10 feet from a traffic area
- ✓ NOT approach any type of vehicle, parked or in motion.
- ✓ Never ask a merchant to settle an argument between troops
- ✓ not block the merchant entrance (leave 5-10 feet between the booth and the door)
- ✓ NOT approach customers inside the merchant's facility
- ✓ Leave the site in good, clean condition. Remove ALL trash and cookie box materials (recycling)
- ✓ Never argue with a merchant's personnel. If they ask you to leave, do so without a fuss

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## DELIVERY PROCEDURES

The Lisle Regional Service Center makes all the delivery site arrangements and prepares the schedule. DO NOT alter the schedules.

- ✓ Present the schedule to troop managers at the appropriate service unit meeting to sign up for a delivery time.
- ✓ Distribute window I.D. cards to each troop at the kickoff meeting. Have the troop manager fill in service unit name, troop number and delivery time. Troop manager (or person designated to pick up troop order) must bring the ID card to the site
- ✓ Recruit 12 people (minimum age 13) to assist with distribution for the duration of the service unit assigned timeframe.
- ✓ Prepare a Quick Pick form for each troop by filling in FULL CASES ordered for each product. Use a thick black marker and write in large print. Use the online order entry system report to get quantities for each product.
- ✓ Sort Quick Pick tickets by pick-up time or troop number
- ✓ CP Only - Service unit delivery team should arrive at the delivery site 15 minutes before the first delivery
- ✓ Check in troops as they arrive
- ✓ Distribute Quick Pick tickets to vehicles. Tape the tickets to the rear PASSENGER SIDE WINDOW (inside the vehicle if weather is inclement).
- ✓ Instruct drivers to proceed slowly to the first trailer
- ✓ Volunteers load the cases directly into the vehicle from the trailer –
- ✓ COUNT CAREFULLY!
- ✓ Service unit team must stay at the delivery site for their scheduled duration.
- ✓ Give all unclaimed picking tickets to the delivery agent crew leader.
- ✓ If a troop does not pick up the order at the scheduled time, the order must be picked up at the delivery agent's location (Sycamore, Illinois – about 1 ½ hours from Lisle) the following Friday (one week later) – NO TROOP DELIVERIES AT THE Lisle Regional Service Center

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### Material Distribution:

Cookie Sale materials are distributed to leaders at the November service unit meeting. Distribute materials as detailed in the chart below:

<b>TROOP MATERIALS:</b>	<b>DISTRIBUTE:</b>
Order cards (large)	One per girl
Teen order card (pocket size)	One per teen Girl Scout (13-18)
Badges / Permits (if required)	One per girl
Poster	One per troop
GSUSA Activity Guide	One per troop
Schedule of Events*	One per troop
Order Entry system Flow Chart*	One per troop
Troop Manager Guidelines/Procedures*	One per troop
Window ID Cards*	One per troop

Materials in Spanish are available at the Lisle Regional Service Center

\*Available on the website [www.girlscoutsgcnwi.org](http://www.girlscoutsgcnwi.org) (Lisle Tab) Girl Scout Program page

<b>SERVICE UNIT MATERIALS:</b>	<b>DISTRIBUTE:</b>
Quick Pick Tickets (for delivery day)	DO NOT DISTRIBUTE TO TROOPS – used by SU manager on delivery day
Money envelope	One per girl (at time of delivery)
Chase Bank Deposit tickets	One per troop (at time of delivery) (plus one for each weekend of CP booth sales)

- ✓ Get organized. Create a folder, envelope or filing system for each of your troops.
- ✓ E-mail your managers frequently with reminders about the “Next Step” and key dates
- ✓ Count troop envelopes and write the troop numbers on the deposit tickets BEFORE you give them out on delivery day.

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## Service Unit Training Outline

Used to train Troop Cookie Managers

1. Sign in
  - Make sure troops sign in
  - Get all pertinent information on sign in sheet – including e-mail address
  - Have troops sign up for delivery times when they sign in
  
2. Welcome / Introductions
  - a. Your name
  - b. your e-mail address
  - c. Daytime and cell phone numbers
  - d. Service Unit Information
    - i. Service Unit Name
    - ii. Service Unit Director name, phone, e-mail
    - iii. Membership Manager name, phone, e-mail, office hours
    - iv. Program Manager name, phone, e-mail, office hours
  - e. Troop Managers and all Girl Scouts participating must be current registered members
    - i. Have membership forms available
  
3. Communications
  - Each Troop manager and/or leader must have a valid e-mail address to be able to place the product order
  - Communication with program information and reminders will be primarily via e-mail – check it frequently. Also check your “junk” mail
  - Program sales team will acknowledge via return e-mail that troop has been approved to use the on-line system – orders cannot be placed without pre-registration
  - Any questions call the service unit manager (give out your e-mail address, telephone number where you can be reached, your availability for telephone calls (i.e., Not before . . . Not after)
  
4. Distribute Materials
  - Refer to for distribution schedule
  
5. Program Sales Guidelines and Procedures
  - Show publication - discuss its contents
  - Parent permission slips must be signed and on file with the leader
  - Should be used by leader and troop manager – each should get a copy
  - Show how to access the document on the website
    - Interactive file (needs Microsoft® Word)
    - PDF file (uses Adobe Acrobat Reader) not interactive
  
6. Schedule of Events
  - Show & review document - give each manager a copy
  - Discuss schedule – highlight important dates
  - Keep this page in a prominent place to keep you on track.
  - Discuss Polar Bear Sales (Jan) and Booth Sales (Feb-Mar)
    - a. Important dates
    - b. Site sign up
    - c. Ordering product
    - d. Delivery dates / procedures
    - e. Rolling over cookies into order taking sales
  
7. Product Line Up – What’s New
  - Use order cards to demonstrate product and card information

## 8. Training Girls

- Use Troop Manager Guidelines and Procedures document
- Talk with girls/parents in January
- Set Goals
- Discuss recognitions
- Selling techniques and safety

## 9. On Line Order Entry System

- Flow chart is available on website for directions (give each manager a copy)
- Give website address [www.girlscoutspw.org/ordering](http://www.girlscoutspw.org/ordering)
- Annual System registration (by Nov 24 - polar bear sales; by January 1 for order taking sales)
  - a. Review approval process (allow 1-7 days)
- Review important deadline dates
- Use girl first name last initial only in system (Chris K) - do not use initials only (CK)
- You will not receive a confirmation
- Do not leave blank lines "no names"
- Order will be placed in full cases only

## 10. Delivery

- Date (see schedule of events); Troop sign up for a timeslot
  - ✓ Refer to Delivery Procedures document available on website (give each manager a copy)
    - Use Window ID Card (available on website)
    - Be on time
    - Don't be late – Must send someone if you can't come
    - Each vehicle must have two adults
    - If you don't show up at the designated time your order will be sent back to the delivery agent's location (Sycamore, IL). You will not be able to pick up your order until the next Friday.
    - Don't bring children or pets
    - Bring your troop order (printed from the order entry system)
    - Verify your order as soon as you get home – NOT AT THE DELIVERY SITE
    - Report any discrepancies to the Lisle Regional Service Center on Monday morning. One week after delivery will be allowed for all delivery corrections.

## 11. Recognition Program

- ✓ Troop Earnings
- ✓ Girls will qualify for recognition items by participating in the order taking program only. Sales and participation in direct sales or booth sales are not included.
- ✓ Troop choice (Grade 6 and up only) - Recognitions or additional 5 cents per box
- ✓ Fall Product Bonus money (if participated in Fall Product Sale)
  - Paid AFTER troop deposit slip is turned in

## 12. Money

- Checks are made payable to: Girl Scouts of Greater Chicago and Northwest Indiana (GSGCNWI)
- Money is never collected in advance – only when the product is delivered
- Record each girl's payment in the on-line system. Girls not paid in full will be contacted by the Lisle Regional Service Center.
- Booth Sale Deposits (due each week of sale)
- Turn in validated bank deposit or deposit receipt to the service unit communications coordinator on or before the designated date. Troops that do not submit their deposit slips on the scheduled date are considered delinquent – late charges and fees may be incurred for any troop in arrears.
- Any troop in arrears will not be allowed to participate in future money-earning activities, including fall product and cookie programs, until the account is cleared. In addition, volunteers involved may not be reappointed to their positions.

- Make the troop earnings deposit
  - ✓ Refer to the on-line system report for the exact amount to deposit into the troop's bank account.
  - ✓ USING THE CASH YOU HAVE AVAILABLE DEPOSIT THE ENTIRE EARNINGS AMOUNT- EVEN IF A GIRL HAS NOT PAID.
  - ✓ DO NOT DEPOSIT TROOP EARNINGS INTO COUNCIL ACCOUNT
  - ✓ Get a deposit slip from the leader for the troop bank account – DO NOT GIVE THE TROOP LEADER CASH
  - ✓ If you don't have enough cash to keep entire troop earnings amount, the troop will be reimbursed via electronic transfer directly into the troop bank account.
  - ✓ Deposit all checks into council account – NEVER DEPOSIT CUSTOMER CHECKS INTO TROOP ACCOUNT
  
- Make the Council deposit
  - ✓ Deposit slips are distributed to each troop at the delivery site. Extra deposit slips are available at the Lisle Regional Service Center
  - ✓ Deposit the total amount due the council indicated on your report (\*less any girl delinquencies)
  - ✓ Deposit at any Chase Bank
  - ✓ Get a receipt for each deposit and turn it in to the service communications coordinator
  
- Refunds due to overpayment
  - ✓ The troop leader must provide the troop's bank information to the Lisle Regional Service Center in order to receive a refund

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# ORDER ENTRY SYSTEM

Instructions for Service Unit Program Sales Teams

## Step 1: Register as the Service Unit Manager

- Access the Girl Scout website [www.girlscoutspw.org](http://www.girlscoutspw.org)
- If you are a first time user (never done this before) and have NOT registered on the Volunteer Network (V-NET) click the word **Register**
  - ✓ Select Service Unit Manager as your role
  - ✓ Enter your Full Name, e-mail address (double check spelling!!)
  - ✓ Name a password (your choice – something you will remember)
  - ✓ Confirm your password by entering it again
  - ✓ Enter your phone number, including area code)
  - ✓ Continue
  - ✓ Select your Service Unit name from the drop down box
  - ✓ Log out – you will receive a confirmation e-mail once you are approved in the system. Check your junk mail for approvals.
  - ✓ DO NOT PROCESS MORE THAN ONE REQUEST
- If you have done this before or have registered on the Volunteer Network (V-NET) enter your e-mail address and password to log in.
  - ✓ If this is the first time you accessed the program THIS YEAR select the button that says “I’d like to request privileges . . .”
  - ✓ Enter your role (Service Unit Manager)
  - ✓ Enter your service unit name
  - ✓ Log out – you will receive a confirmation e-mail once you are approved in the system. Check your junk mail for approvals.
  - ✓ DO NOT PROCESS MORE THAN ONE REQUEST

## Step 2: Approving Troop managers

- Log into the system using your e-mail address and password
- Select your role (DO NOT SELECT REQUEST PRIVILEGES BUTTON!)
- Continue
- Select your product (should default to current program)
- Continue
- Select Approve Troop Authorizations menu
- Check the troop numbers against your current membership roster.
  - If the troop belongs to you, click the approve button and confirm the request
  - If the troop does not belong to you, DO NOT delete them. Send the Lisle Regional Service Center an e-mail with the troop number. The office administrator will investigate the troop number and re-assign the service unit designation.
  - If the troop has registered more than once, click the delete button. Do not allow troop managers or leaders to register more than once.

## Step 3: Contacting troop managers

- Log into the system using your e-mail address and password
- Select your role (DO NOT SELECT REQUEST PRIVILEGES BUTTON!)
- Continue
- Select your product (should default to current program)
- Continue
- Select the Edit Managers menu
- Click on the e-mail address – type your text in the message block and send.

#### **Step 4: Apply troop payments (deposit slips)**

- Log into the system using your e-mail address and password
- Select your role (DO NOT SELECT REQUEST PRIVILEGES BUTTON!)
- Continue
- Select your product (should default to current program)
- Continue
- Select Print Reports Menu
- Select Service Unit Ordering Report
- Click on the Troop number in the first column.
- DOUBLE click on the "\$0.00" for each troop in the column named "AMOUNT DEPOSITED" - This will bring you to the TROOP DEPOSITS menu
- Click on Add a Deposit- enter the date – MM/DD/YY (stamped on the receipt) and the actual amount. Enter a transaction for EACH deposit slip you receive – do not add them together
- Repeat for each troop. If the troop is paid in full, double check each troop's girl order report to insure each girl has been cleared. If some girls are not cleared:
  - Click on the troop number
  - Click on the girl's name (if not cleared)
  - Enter the exact amount she paid in the payment box
  - Save
- Go Back to the main menu

#### **Step 5: Distribute Recognitions**

- On the Service Unit reports page, select Awards Report
- Go to FILE; PRINT