



# School Store: *An Operating Manual*

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# School Store:

## *An Operating Manual*

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# Preface

This manual has been created from a partnership with Future Business Leaders, of America- Phi Beta Lambda and the Raymond Geddes & Co.,Inc. For more information on FBLA, call 1-800-325-2946.

The author, Raymond Geddes, Jr., created the first draft of this manual in December of 1986, as a result of a life-time spent in the business of selling school supplies and in the setting up and selling to school stores on both the elementary and the secondary levels.

Special thanks to the following FBLA Advisers from the State of Wisconsin, for working on the rewrites:

- Daryl Braatz, Thorp, Wisconsin
- Marie Braatz, Colby, Wisconsin
- Jennifer Wegner, Mishicot, Wisconsin

The purpose of this manual is not to make a profit. Rather, this manual is designed as an attempt to cover the many different aspects of a school store operation. These pages are not engraved in stone. It is an advantage that so many aspects of a school store operation are flexible. Several examples are: days and times of operation, by whom, types of records, etc. When you read this manual, take from it those parts most suitable to your operation.

A copy is available from the Raymond Geddes & Co.,Inc. for the asking.

# Introduction

The School Store is a place where students can purchase supplies for their classes at reasonable prices while within a school setting. This venture is a small store selling items such as binders, notebooks, pens, pencils, calculators, rulers, paper, etc. The store also supplies students with many fun and trendy novelty items chosen by School Store workers.

As with any other activity in a school, the success of the School Store depends on the interest shown by and the time given by the adviser who must properly supervise it and keep merchandise on hand that is in demand by the students. One way to help ensure the success of the School Store is to create, distribute, and tabulate student and faculty merchandise/supplies surveys. (See Appendices A and B).

A School Store is a considerably under-utilized educational tool. It is a hands-on learning tool for students. This business learning opportunity can easily be integrated into any business class and/or as part of an FBLA project.

- Students learn about cost and profit.
- Students learn customer service by waiting on customers.
- Students learn how to make change.
- Students learn to order and check in merchandise.
- Students learn accounting by working on real records.
- Students learn about sales tax.
- Students learn the importance of advertising.

Properly run, the School Store will prosper and will make money. Improperly run, it will do what any other business will do – fail.

# Purpose

## Why Have A School Store?

### Convenience

- The supplies that students will need are available at school.
- Teachers who require a particular type of item can be sure that it will be available for the class to purchase.
- Students who forget to bring paper, pencils, computer disks, and other school supplies from home will be able to get them without borrowing from the teacher.

### Experience

- This is a true-to-life situation, incorporating teamwork, responsibilities, management, and tangible results using business, advertising, and accounting skills. Properly run, a profit can be made. Improperly run, a loss will occur.
- The store should be run by the students, with an adult sponsor to supervise.
- A store run by the students and supervised by a teacher provides a wonderful learning opportunity promoting academics and social interaction.
- Teachers can use the store as a workshop or as a simulation in connection with their classroom work. It can be used as a graded activity, it could be based on participation, completeness and accuracy of work, reflection worksheets, and a final paper.
- Students are given practical experience in making change with real money.
- Students are able to understand simple economics through hands-on activities.
- Students learn about the ordering process.
- Students understand the difference between wholesale and retail.
- Students learn how to deal with people.
- Positions can be created from manager down to sales clerks so that students can see what is involved in operating their own business. One of the best ways for students to see how the different positions work is to rotate them within groups, giving each group to specific jobs. Some of these jobs are: advertising, working in the store, inventory, banking duties, and financial analysis. Students not only learn the “ins and outs” of a business, but they also learn the responsibility and attributes of a successful employee. Students could be allowed to choose their own groups until such time as the groups become unproductive or have a serious problem within the group; such as, an inability to get along or continued absences.

### Profit

The profits derived from the School Store could go back to the students in the form of new equipment for the school, field trips, money for organizational activities, special programs, etc.

## Who Can Have A School Store?

1. Elementary school students
2. Middle school students
3. High school students

This project can be for:

- One class
- Student government
- Organizations
- Parent groups
- Special Education classes
- Remedial math classes
- Top students who need a challenge
- Withdrawn students
- Parents (who would like to help the school)
- School Fundraising Department (Business Education Department, Math Department, Etc.)

## The Application Process

Whether the School Store is a class project or an organizational fundraiser, it is important to have the students apply to work at the School Store. (Please see Appendix C for a copy of a School Store Application). By doing this, students will have the experience of filling out a job application. Before the teacher has the students fill out the application, he or she will need to decide upon the schedule of store hours. Most school stores are open before school, during lunch, or after school. Students work in the store during their study halls or free periods. The School Store application should be signed by both the student and the parent.

In addition to the application, the School Store supervisor may want to have faculty members fill out an evaluation on the applicant. (See Appendix D). These faculty members can be chosen from the class list that was supplied by the student applicant in the School Store Application. This will give the School Store supervising teacher a true picture of the trustworthiness and dependability of the student applicant and will let him or her know that the student has the grades and the time to work in a school store.

## School Store Positions

The actual organization of the store positions is flexible and some jobs can be combined. Listed on the following pages are some suggested positions.

**General Manager** This student would report to the School Store supervising teacher. He or she would supervise the overall management of the school store.



**Shift Managers** These students would be in charge of the overall management during the particular shift in the event that the store is open more than once a day. They would be responsible for making sure all workers are aware of the following Do's and Don'ts:

**DO**

- Have a partner to work with.
- Keep the store and money locked up when unused or unsupervised.
- Be polite to ALL customers.
- Keep the store neat.
- Mark down all sales.
- Use a calculator or paper to figure totals and change if you don't have a cash register.
- Count change back to the customer.
- Report all problems IMMEDIATELY.
- Make customers wait in a single file line.

**DON'T**

- Joke with people about their money.
- Play with the store merchandise.
- Leave the store unattended.
- Give credit to customers.
- Talk to friends while working at the store.
- Have money where people can reach it.
- Put money from sales into pockets for safe keeping.
- Get flustered – take your time.

**Order Clerk** This student would keep a “Want Book.” This is a book where items to be ordered, as well as items not presently carried are posted. To help determine new products, the order clerk may want to work with some of the student workers on a product analysis to come up with some new merchandise. (See Appendix E for a sample of a product analysis form). This student would also check the stock for low items. To keep track of the inventory, each shift clerk or School Store worker would keep track of each item sold on a daily tally sheet. (See Appendix F).

In order to help determine how many items to keep on hand, the order clerk would be responsible for supervising the other student workers in an inventory that would be completed periodically. (See Appendix G or an inventory control sheet). Counting the inventory and completing this sheet will ensure that there is no merchandise lost and that there are enough of each item so that purchasing can be done by the order clerk.

The order clerk should direct the student workers to work together counting inventory as a group. Students should be instructed to work together to quickly and efficiently get each item counted. Students should double check any items where discrepancies occur. The order clerk and the supervising teacher should stress accuracy. Each space should be filled in carefully with the appropriate amount when each group of students

is finished counting it. The order clerk should not wait until stock is gone before ordering. When ordering, this student would most typically order by stock numbers and item description. He or she would either phone in, mail, fax, e-mail, or order over the website when necessary.

**Receiving Clerk** This student would check off incoming orders with the order clerk. He or she would enter incoming items in a ledger or in a stock record. Incoming orders are most frequently accompanied by a packing slip. The student should check the order against this to make sure that each item on the packing slip and invoice is included in the shipment. This invoice is the document which charges you for your merchandise and is your record of your purchase. Sometimes the actual invoice arrives later in the mail. If so, it will be marked INVOICE. The receiving clerk should, before opening the order, make sure that he or she has the complete shipment on hand. Assume that there are five cartons in one shipment. In the upper right-hand corner (or somewhere else) on the shipping label, it should say "5 of 5 cartons."

The receiving clerk also puts stock on shelves, making sure that the old stock is placed in front of the new stock. This is called "rotating the stock." It is a necessary procedure to insure that the old stock sells first.

**Accountant** This student would keep a daily record of sales. (See Appendix F for a daily tally sheet and Appendix H for a sample of the deposit record form). He or she would write in the date and the names of the School Store clerks working. All deposits made would be listed. Each check received is listed separately. Each bill type and coin type would also be listed separately.

The accountant would:

- Fill in the date and members of the group on the appropriate line.
- Obtain information on previous deposits made that week by the supervising teacher/adviser.
- Empty the money from the cash box.
- Count out the appropriate amount of cash to be placed back into the cash box for change the next week. (This would most likely be \$10-\$15).
- Count the rest of the money by denomination. \$1 bills first, \$5 bills, quarters, etc. and place the total on the deposit slip next to each of the denominations listed.
- Total the deposit.
- Get the approval of the supervising teacher/adviser.
- Take the cash and the deposit slip to the office.

The accountant should keep all receipts and may want to keep receipts and expenses in a separate ledger. A two column general ledger will be sufficient. The accountant would also assist the receiving clerk with organizing and supervising the weekly inventory.

**Advertising Representatives** Advertising what your School Store has to offer is a must. If students do not know what you have when they need it, your store will not be a success. Make sure you have

posters, announcements, and notes in the parent newsletters which inform them of the School Store's existence and what they carry. This would be the duty of the advertising representatives. The following is a sample announcement for a new promotion that your advertising representatives, if allowed, could do periodically on the intercom in the mornings.

"The School Store sells everything you need for school and fun accessories to make you cool. Now for every item you purchase, we will put your name in a drawing. The winner of the drawing will be announced on Friday at 2:55 pm. If you win, you will get a prize valued up to \$5.00. So, come on down, we are open every day before school from 7:45 to 8:00 am each day and from 3:00 to 3:15 pm every day after school. Who knows, the next winner could be you!"

These students could show new items in homerooms if permitted. They would be able to take requests for items not currently in stock. They could also design and execute posters and showcase displays. Advertising is an important aspect of today's business world.

The following is a sample poster you could hang in the hallways of your school:

# **We Have Everything!!!**

Visit the School Store for  
all your class needs  
Monday - Friday  
7:45 - 8:00 am  
3:00 - 3.15 pm



## Sales Clerks

These positions are extremely important. Sales clerks must know how to make change, must be helpful, must help to keep the stock neat, suggest items that are getting low to the order clerk, and must know the stock.

Store rules should be made clear to sales clerks. They should adhere to the following rules:

- Be courteous and polite to all customers
- Report all problems to the shift manager or the supervising teacher/adviser immediately
- There is no sitting in the School Store
- Keep track of all sales
- Make the customers wait in a straight line
- Watch for shoplifters
- Work in pairs or more whenever possible
- Keep the store in order and neat
- Count money back on all sales
- Double check all math

### **Steps to be completed by the first shift Sales Clerks before working:**

1. Look at the schedule and list all sales clerks working for the day.
2. Sales clerks working the first shift of the day need to count the cash in the cash box and enter the starting cash amount somewhere on the daily tally sheet. (See Appendix F). They could also use a daily worksheet form. (See Appendix I).
3. Sales clerks need to enter beginning information on the tally sheet.
4. Sales clerks need to make sure that all items can be easily located and are available.

### **Steps to be Completed by Sales Clerks while working (optional):**

1. Sales clerks need to enter an item description for each new item sold on the tally sheet. They need to enter a tally mark in the tally column for that item (see appendix F).
2. Double check the dollar total, amount given, and change amount.

### **Steps to be completed by Sales Clerks upon closing the store for the day:**

1. Total up the tally sheet.
2. Count cash in cash box. Enter total on the bottom on the tally sheet.
3. Clean up work area.
4. Have supervising teacher approve sheet and make daily deposit to the office.

Each group of sales clerks are responsible for the merchandise and money during the posted work times. If any money or merchandise is missing, students should be instructed to alert their supervisor immediately.

### **All School Store Employees**

Students will be given a schedule of those times which they will work by the supervising teacher/adviser. If at any time a student cannot work during their scheduled time the supervising teacher must be notified in time to find a replacement.

At all times the store should be kept neat and clean. Have a place for everything. Use shelf labels. Shelf labels should include:

- Stock number
- Name of item
- Price

This makes reordering easier and helps keep the store neat. It also eliminates the possibility of a popular item being sold out fast and no one being able to remember what was in that spot.

Keep the cash box out of the reach of customers. Don't have too many clerks working at one time. They get in each other's way. An adult should be present at all times so that students know that they are being properly supervised.

# Ordering/Checking

The School Store order clerk or purchasing agent should know what he or she is ordering.

If the item is something like memo pads, spiral composition notebooks, marker sets and carries a stock number or it is something bought out of a catalog and has a stock number, use it. Use of stock numbers and item descriptions greatly reduce the problem of incorrectly ordered merchandise.

A photocopy should always be made of an order. Sometimes it helps to have another person review the order. Stress to students to always remember to get the supervising teacher/adviser's permission before placing the final order.

Incorrectly ordered merchandise causes unnecessary costs to both the supplier and the school store purchasing agent or order clerk.

When a shipment arrives, it should be properly checked off. Far too many retailers assume that the order is correct and put the merchandise on the shelf without checking. It does not matter how much one trusts the supplier, it is proper business procedure to check off the order and there is a proper way to do it. Do not take the items out of the boxes and put them on the shelves, checking as you go. The proper way is to take them out of the box, check them off, and put them in an area cleared for that purpose. Do not put the stock on the shelves until the order is checked off and found to be correct. This way if the order does not agree with the packing slip, it can be rechecked. Once the items are placed on the shelves and get mixed in with other stock, it is too late.

In fairness to the supplier, any mistakes should be reported at once. Some companies do not allow claims made after ten days.

# Accounting

Accounting for the School Store can be a very simple thing if desired. As in any business, one needs to know income and expenses. One should start with a known petty cash amount each day, and subtract that from the daily total to get the daily total receipts.

There are four ways to handle income:

1. Many schools just use a cash box. The obvious problem is that there is no real control.
2. Some schools use a cash box in conjunction with a stock list. The clerks, or one person appointed to do it, make a mark after each item as that particular item is sold. Then, at the end of the day, an attempt is made to balance the money in the cash box with the marks on the list. Experience has shown that this method does not always work as the school store is busy. When sales clerks get busy, they may mark a wrong item, or fail to make any mark at all. Consequently, the marks and the cash box do not balance. Supervising teachers /advisers should stress the importance of accuracy to sales clerks with this method is used.
3. Many schools use a cash register. This is obviously the best method, as it records transactions on a tape. The money on the tape must equal the money in the drawer. It is an excellent control. The obvious disadvantage of the cash register is its cost, although they can be purchased for as little as \$250.
4. The last suggestion, and one seldom thought of, is the use of a calculator with a tape in conjunction with the cash box. At the end of the selling period, the tape total should be checked against the total of the cash box. The totals should agree.

Now to accounting! In the simplest form, it is nothing more than a loose-leaf binder divided into two sections.

The first section could be entitled "Receipts/Expenses." A suggested column layout for this section is below:

Date	Receipts	Expenses	Balance	Invoice	Date	Amount
10/6/00	15.00		15.00			
10/7/00	10.00		25.00			
10/8/00	20.00		45.00	#9615	10/8/00	20.00
10/9/00	10.00		55.00			
10/10/00	Inv 9615	20.00	35.00			

There are a number of varieties to this basic system. In the event that the store is financed by school funds, that amount should be entered in the "Receipts" column at the beginning and the source of the funds noted.

In many school systems, regulations require receipts to be turned into the office on a daily basis. In any case, whatever the requirements, funds turned over to anyone else by the school store supervising teacher/adviser should be accounted for by a receipt for those funds. The receipt should be kept in the records of the supervising teacher/adviser.

The other section of the loose-leaf binder could be entitled "Purchases/Invoices". Incoming merchandise must be covered by an invoice which lists the item and the cost per unit. Some, but not all, list the suggested retail price of the items. The following is a sample section of such an invoice.

Ck	Quantity	Retail Price	Stock	Description	Price

Some companies sell prepaid or delivered which means there is no delivery charge. Others sell F.O.B. shipping point which means that there is a delivery charge and you pay for it. For example, if the merchandise cost is \$100 in Detroit and the shipping charges are \$10, it means that the merchandise actually costs \$110 or 10 percent more than it would cost you in Detroit. Many customers ignore or forget shipping costs. They should not, as shipping is expensive. The only other aspect of school store accounting is an optional one – the stock record. Listed below is an example of a stock record.

## School Store Stock Record

ITEM \_\_\_\_\_ STOCK NUMBER \_\_\_\_\_

Date	Amt. On Hand	Amt. Ordered	Wholesale Cost	Retail Price

Stock records are nothing more than an individual record, a page for each item, showing such things as cost price, retail price, and quantities ordered and sold. There is a decided advantage to them. Stock records show a written record of the movement of a particular item. These records show how long the item has been in stock and how well the item moves.

Keeping stock records will help to avoid "Dead Stock." It will help when looking up cost prices while figuring inventory.

Commercial inventory cards may be available through office supply stores. Stock records can also be set up on a computer.

## Collecting Sales Taxes

Sales tax laws vary greatly across the country and it will be your responsibility to follow all state laws concerning the collection of sales tax. If you are running a School Store, your customers are the end consumer, and as such, you should be collecting state sales taxes and then remitting these collections to the state.

Initially, this may seem an overwhelming task for the students operating the School Store, but it is an important part of running a business.

Typically states require a Retail Sales Tax License. Sales taxes are collected on all sales. To ensure that no mistakes are made in sales tax calculation, students working the School Store can easily create a sales tax chart. The collected taxes are remitted to the state on a monthly, quarterly, or yearly basis using a tax reporting form supplied by the state.

## **Inventory – Profit and Lost Statement**

In any operation concerning the sale of merchandise, it is desirable to know the amount of profit that is made. A more graphic way to express it is:

**ASSETS – LIABILITIES = NET WORTH (PROFIT)**

**OR**

**STOCK ON HAND + CASH IN BANK – BILLS OWED = NET WORTH (PROFIT)**

The merchandise in any inventory represents not pencils, erasers, and rulers, but money. The question is: How much money?

Once inventory taking has started, no selling should be done until it is completed. All that is needed are several people – the more the better – who can count. They can be, but need not be, the store personnel. (Use the suggested inventory sheet found in Appendix G). The people counting move from item to item noting the quantity of each item. Each person then writes the physical count of each item they were assigned on the inventory sheet. Items should be counted again by at least one other person as an accuracy check.

At the end of the physical count there will be a complete list of all items in the inventory plus the total quantity of each item.

The inventory now needs to be priced at cost. The cost is the wholesale price that the school pays for each item. This figure should be obtained from the vendor's latest invoices or from an item cost book made up from the vendor's invoices. Do not use a vendor's catalog, as prices change and you may get an incorrect cost.

To figure the inventory, multiply the quantity times the unit cost for each inventory item and you will get the wholesale cost for each. Then run a grand total. This is the total wholesale cost (and value) of that particular inventory.

### **Profit and Loss**

To do a proper Profit/Loss Statement a definite starting point and stopping point is necessary. Two inventories are needed. One is called an opening inventory and the second is the closing inventory. A suggestion – the period of time between the two should be no less than three or four months unless a tremendous amount of merchandise is sold. (See Appendix J for a Profit/Loss Statement.)



# Pitfalls

In any business operation there are problems. Most can be avoided or solved by an alert manager/adviser. If they are not, the school store, like any other business, will fail.

Some pitfalls:

- Dishonesty – Each person involved in a school store operation must be honest. Any dishonest person should be immediately removed.
- Price mistakes – Watch invoices for price changes as they may occur without notice.
- Wrong change – School store personnel, whether children or adults, should know the proper way to make change.
- School office or other school organization removing merchandise without paying for it – The office should be charged. Money may not necessarily change hands, but records – at retail price – should be kept on what is taken. The school store must pay for all of the merchandise it gets, including those items that are removed and not paid for. If no record is kept, it is the same as if the item was stolen, with the same effect on profit.
- Wrong ordering – Know what you are ordering and in what quantities.
- Fast talking telephone salesmen – This is a persistent problem. Be careful of anyone with a “great deal for you”. Sign no order unless you know exactly what you are buying and the quantities and price of the article.
- Imprints – Everybody loves them except the guy who has to pay the bill. The principal, the teachers, and the PTA all want to build school spirit with imprinted material, which is commendable. Most of the time, of course, it cannot be returned if it doesn’t sell. Usually there are large quantities involved and if it doesn’t sell, there are large losses also. Regarding t-shirts and sweatshirts, etc., because there are different sizes, find a supplier who will sell small quantities.
- Discounts to store workers – The answer is No. By working in the School Store, they are receiving a practical true-to-life education in business that is available to very few of their peers. If there is a school letter or other award, points toward it should be given to the workers.
- Credit to students – No.
- Discounts/Credit to teachers – A decision about this should be made by the principal, perhaps following recommendations made by the School Store Board of Directors. The handling of discounts requires a complete list of special prices. The only other way is to give a certain percentage off the retail price. When the sale is made, the purchasing teacher gets the original and the duplicate is retained by the School Store. At the end of the month the teacher would get a bill. When payment is made, the duplicates are torn out of the sales book, marked paid, and given to the teacher. Credit should not be extended for more than one month at a time.
- Because the responsibility for the proper operation of the School Store falls on the shoulders of the supervising teacher/adviser, this person should have all orders placed approved by him or her.

- At the end of every month, many companies will send out Statements of Account. This is a reflection of what the vendor's books say that you owe. Do not pay this unless your records agree with the figures shown on the statement. If they don't agree, ask the vendor for clarification.

## Other Ideas

Many schools implement other creative ideas into their School Stores. Some of these ideas include:

**Gift Certificates** (See Appendix K) – Gift certificates could be sold for amounts of \$5, \$10, \$15, or \$25. These could be marketed to parents at the beginning of the school year and before Christmas to encourage sales.

**Stocks** – Some School Stores allow the student workers to purchase shares of stock and invest into the business. (See Appendix L). Students receive a return on the investment based on the profit that is made and the number of shares of stock that they own. Amounts of stock that can be purchased and dividends returned is up to the discretion of the supervising teacher.

**Class Assignment** – If the School Store is being used as a class project, and student workers are to receive a grade, the supervising teacher/adviser may want to have each student working in the school store fill out a weekly reflection sheet. (See Appendix M). The teacher could assign a point value for the completed reflection sheet each week.

## Notes

# Appendix A

## School Store Staff Survey

The School Store is ready to get under way this year. However, we need your help. Our goal is to provide the supplies that students will need for your classes throughout the year. Please answer the following questions and return this form to \_\_\_\_\_ by \_\_\_\_\_ .

Staff Name\_\_\_\_\_ Department\_\_\_\_\_

What supplies do you require students have each day for class?

During any units during the year, will students need special supplies? When do you usually complete this unit?

Do you require reports in your class that need to have report covers? YES/NO

Do you require students to save computerized projects on disk? YES/NO

Will you be using specialized dictionaries or other books that students may want to purchase for their own reference? YES/NO

If so, list below title/author.

Are there other supplies that you feel should be available to students?

Are there supplies that you personally would like to see offered for staff members?

## Appendix B

### School Store Student Survey

The XYZ School is starting a School Store. We would like to know what types of supplies students need every day. Below is a list of items. Please check if you use the item, or would want to see the item offered at the school store.

Item Description	Use it	Put in store
Pencils		
Mechanical Pencils/Lead		
Pens		
Gel Pens		
Erasers/Pencil-top Erasers		
Pencil Grips		
Markers		
Crayons		
Glue/Glue Sticks		
Rulers		
Highlighters		
Notebooks		
Binders		
Looseleaf Paper		
Report Covers		
Magnetic Locker Mirrors		
Pencil Sharpeners		
Memo Pad		
Bookmarks		
Calculators		
Compass		
Protractor		
Scissors		

Are there any other items that you would like to see the School Store offer?

## Appendix C

### School Store Application

Student Name: \_\_\_\_\_ Grade: \_\_\_\_\_

I am interested in serving as a School Store worker for the \_\_\_\_\_ school year. In addition, I am willing to accept all responsibilities necessary for the successful operation of the School Store.

I am available to work in the School Store:

Before school \_\_\_\_\_

During school \_\_\_\_\_

After school \_\_\_\_\_

Student Signature: \_\_\_\_\_

Parent Signature: \_\_\_\_\_

Please list your classes/teachers:

Homeroom: \_\_\_\_\_

1st Period

2nd Period

3rd Period

4th Period

5th Period

6th Period

7th Period

8th Period

List all school clubs or activities in which you are participating during the current school year:

How would you handle someone you caught taking something from the School Store?

If someone gave you \$5.00 to buy a compass for \$.75, a notebook for \$.60, and some graph paper for \$.75, what is the exact correct change you would give them?

How would you handle a crabby customer?

Return this form to \_\_\_\_\_ in Room \_\_\_\_\_ by \_\_\_\_\_.

## Appendix D

### School Store Applicant Evaluation

To: \_\_\_\_\_

Re: School Store Workers

\_\_\_\_\_ has applied to work in the School Store  
for the \_\_\_\_\_ school year.

Please complete the following evaluation and return to my mailbox by \_\_\_\_\_.

	Superior	Excellent	Good	Fair	Poor
Maturity					
Dependability					
Attendance					
Academic Achievement					
Peer Relationships					
Trustworthiness					
Cooperation					

Optional Comments:

Teacher's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# Appendix E

## School Store Product Analysis

Directions: The purpose of this project is to give you the opportunity to introduce a new product into the School Store. As a team, you must complete the following:

- I. Determine The Product
  - A. Describe the item you wish to introduce.
  - B. What are the features and benefits of this product?
  - C. Evaluate the product of the following characteristics:
    1. Suitable for the School Store?
    2. To what group does the product appeal (target market)?
    3. Does it stand up well/wear well?
    4. Unique/not a duplicate?
    5. Is the retail price within the range of the target market?
    6. Is it a good value?
    7. Will it provide a satisfactory profit?
    8. Is the item properly packaged?
  - D. What type of product is it? (impulse, or commodity)
  - E. List the reasons why you think the product would be successful.
  - F. List the reasons why you think that the product might not be successful.
- II. Determine The Supplier
  - A. List the possible suppliers from which to choose.
  - B. List the prices for the product from each of these suppliers.
  - C. Choose a supplier and list the phone number, address, and FAX number of the supplier.
- III. Implement Introduction Of Product
  - A. Inform class members.
  - B. Handle training of worker on product.
  - C. Complete receiving, checking, and marking product upon arrival.
- IV. Evaluate performance of product using above categories and make recommendation for the future sales of the product.

## Appendix F

# School Store Daily Tally / Sales Sheet

Date \_\_\_\_\_ Workers \_\_\_\_\_

Starting Cash \$ \_\_\_\_\_

[illegible]



# Appendix G

## School Store Inventory Control

Directions: Enter descriptions of each item in inventory. Decide on a minimum number of each item to keep on hand (Min). Enter the date that inventory is completed and the total of each item in its corresponding row.

Item Description	Min.	Date	Date	Date	Date	Date	Date	Date	Date

## Appendix H

### School Store Deposit Slip

Date \_\_\_\_\_

Student Banker Names:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Other Deposits Made This week:

<u>Date</u>	<u>Amount</u>
_____	\$ _____
_____	\$ _____
_____	\$ _____
<u>Total</u>	\$ _____

Adviser Approval

\_\_\_\_\_

Office Verification

\_\_\_\_\_

Current Cash for Deposit:

List checks singly:

Amount \$ \_\_\_\_\_  
Amount \$ \_\_\_\_\_  
Amount \$ \_\_\_\_\_

Currency:

\$20 bills \$ \_\_\_\_\_  
\$10 bills \$ \_\_\_\_\_  
\$5 bills \$ \_\_\_\_\_  
\$1 bills \$ \_\_\_\_\_

Coins:

Half dollars \$ \_\_\_\_\_  
Quarters \$ \_\_\_\_\_  
Dimes \$ \_\_\_\_\_  
Nickels \$ \_\_\_\_\_  
Pennies \$ \_\_\_\_\_

Total for Deposit \$ \_\_\_\_\_

#### Directions for Deposit Slip:

1. Write in date.
2. Write in names of student bankers
3. List other deposits made this week
4. List each check received
5. Total each type of bill separately and list total amount on the line.
6. Total each type of coin separately and list total amount on the line.
7. Total checks, bills, and coins. Place total on *Total For Deposit* line.
8. Get Advisor's approval.
9. Take money and deposit slip to office financial secretary.

## Appendix I

### School Store Daily Worksheet

Date\_\_\_\_\_

#### Steps to be completed BEFORE working in the store

1. List team members working today.
2. Count cash in the cashbox. Enter total here\_\_\_\_\_
3. Enter beginning information on the tally sheet.
4. Make sure all items are easily located and available.

#### Steps to be completed WHILE working:

1. Enter an item description for each new item sold.  
Enter a tally mark in the tally column for that item.
2. Double check dollar total, amount given, and change amount.

#### Steps to be completed AFTER working in the store:

1. Total up tally sheet.
2. Count cash in the cashbox. Enter total here\_\_\_\_\_
3. Put all store supplies away neatly.
4. Turn all money and forms into your adviser.  
Adviser approval\_\_\_\_\_

## Appendix J

### School Store Profit/Loss Statement

Income from Sales . . . . . \_\_\_\_\_  
(This is the total of cash receipts)

Cost of Goods Sold:

Opening Merchandise Inventory . . . . . \_\_\_\_\_  
Plus Purchases . . . . . \_\_\_\_\_

Total Merchandise Available  
For Sale . . . . . \_\_\_\_\_

Less:  
Closing Merchandise  
Inventory . . . . . \_\_\_\_\_

= Cost of Goods Sold . . . . . \_\_\_\_\_

Gross Profit on Sales . . . . . \_\_\_\_\_  
(Income from Sales – Cost of Goods Sold)

## Appendix K

### School Store Gift Certificate

School Store Gift Certificate	
NAME _____	\$ _____
FOR _____	
DATE _____	SIGNED _____

## Appendix L

### School Store Stocks

School Store Stock	
NAME _____	DATE _____
PRICE PER SHARE _____	
NUMBER OF SHARES BOUGHT _____	
SIGNATURE OF PURCHASER _____	
ADVISER/MANAGER SIGNATURE _____	

## Appendix M

### School Store Reflection Sheet

Student Name\_\_\_\_\_ Week Of\_\_\_\_\_

At the end of each week, answer the following questions to the best of your ability.

1. What activities did you participate in this week  
(i.e. selling, inventory, advertising, etc.)
  
2. What did you like about what you did?
  
3. What problems did you encounter? What did not go so well?
  
4. What would you change next time?
  
5. Did you and your teammates work well together? Why or why not?