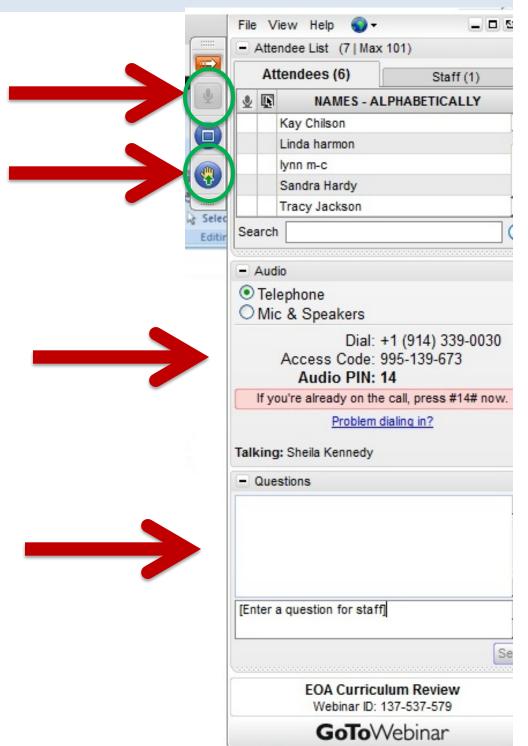


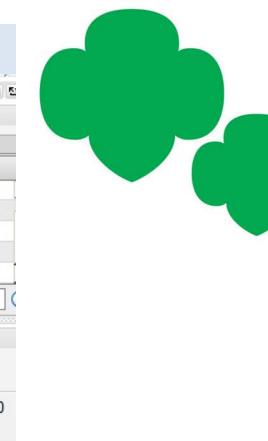
Service Unit Treasurer Orientation





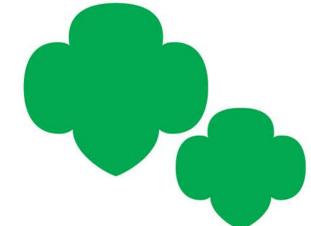
Webinar How To:







Special Thank You to the Service Unit Team Support Go Team:



Cassandra Alexander

Debbie Fountain

Heather Hetrick

Jaunita Doplemore

Kate Knight

Katie Jimenez

Laura Gordon

Liisa Froggatt

Linda Harmon

Liz Miller

Lynda Misiak

Lynn Mack-Costello

Sylvia Wikle

Tammie Scott

Yvonne Scheller



Service Unit Treasurer

Welcome to the Girl Scouts of Greater Los Angeles' Girl Scout Service Unit Treasurer Orientation. This orientation prepares a Girl Scout volunteer to carry out the responsibilities and functions of the position.

For this orientation, you will need to print the Service Unit Treasurer course manual.

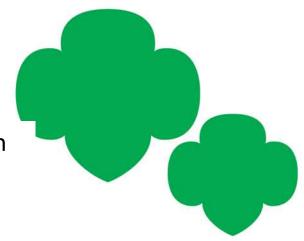
When finished, you will be able to:

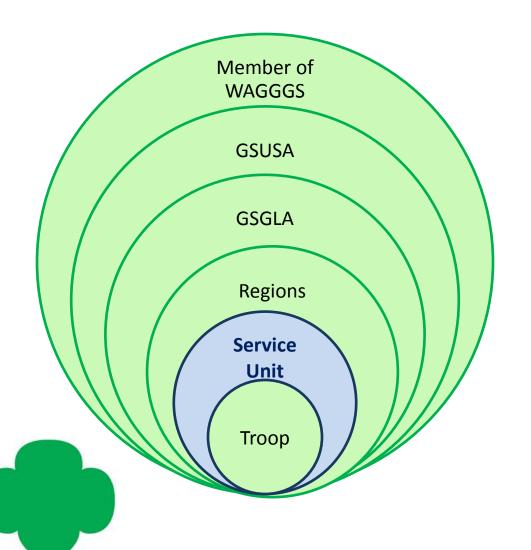
- Describe the responsibilities of a Service Unit Treasurer
- Explain the procedures for the management of the Service Unit funds
- Identify the forms used to managed the Service Unit funds



Service Unit

When you first joined Girl Scouts, you were welcomed by a team of volunteers and became a part of a Service Unit. The Service Unit is an important link between the Council and troops.



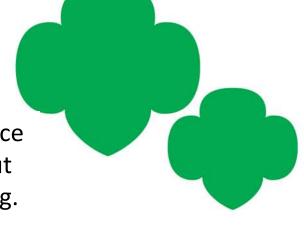


The role of the Service Unit is to:

- Form troops, recruit and place girls and adults
- Support volunteers in the onboarding process
- Provide on going assistance to existing troops and other pathways.
- Celebrate and recognize volunteers

Service Unit Responsibilities and Functions

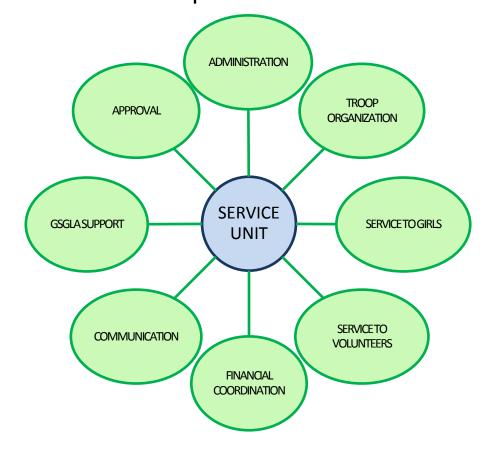
The Service Unit is delegated responsibility to organize and service Girl Scout troops/groups and girls within its boundary. Girl Scout *Pathways* are the way girls and adults participate in Girl Scouting.



Girl Scout Pathways



Service Unit Responsibilities and Functions





Service Unit Team

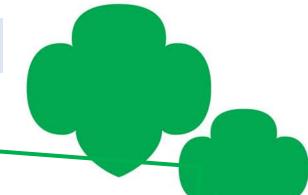
Do you remember what is was like when you attended your first Service Unit Leader meeting? Wouldn't it have been easier if there was someone there you knew who could introduce you and explain the ins and outs? As a Service Unit Team member, you work with your team to set the atmosphere for your Service Unit.



- Go to the Service Unit Team Meetings to find out the latest happenings.
- Pay close attention to all the information you receive from GSGLA enewsletter. It has helpful information to share.



Providing a Welcoming Service Unit



Dear Service Unit,

It amuses me to think that your organization spends so much time looking for new members when I was there all the time. Do you remember me?

I'm the person who came to every meeting, but nobody paid any attention to me. I tried several times to be friendly, but everyone seemed to have her own friends to talk to and sit with. I sat down among some unfamiliar faces several times, but they didn't pay much attention to me. I hoped someone would ask me to join one of the committees or somehow participate and contribute – but no one did.

Finally, because of illness, I missed a meeting. The next month, no one asked me where I had been. I guess it didn't matter very much whether I was there or not. On the next meeting date, I decided to stay home and watch a good television program. When I attended the next meeting, no one asked me where I was the month before.

You might say that I'm a good person. I have a good family and love my community. You know who else I am?

I'm the volunteer who never came back.

Communication

It's important to know how each volunteer wants communication. Everyone is different ~ establishing how to communicate with each volunteer from the beginning will prevent problems in the future.

Do you know how each generation communicates?

Generations	Communications	Messages that Motivate	
The Greatest Generation Prior to 1945	Formal - written	Your experience is respected	
Boomers 1946 - 1964	In person	You are valued, you are needed	
Gen X 1965 - 1980	Direct and immediate E-mail Voice Mail	Forget the rules. Do it your way.	
Nexters – Gen Y 1980 - 2000	Text messaging Twitter Facebook	You will work with other bright, creative people.	



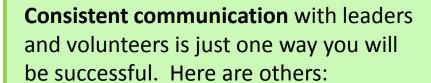
Communication

The term "social media" refers to tools that allow the sharing of information and creation of communities through networks or people. It is a method to have two way conversations online. Some of the most common types of social media include:

- Networking sites (Facebook)
- Microblogging sites (Twitter)
- Forums (Shutterfly, Google group)
- Blogs
- Content-sharing service (YouTube)

Ask leaders and volunteers:

- How would you like me to communicate with you?
- How often should we communicate? (keep in mind there are certain things that come up at specific times)

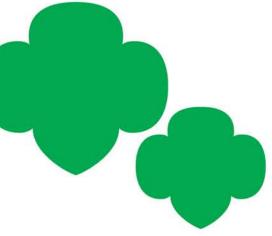


- Understand and support the Girl Scout mission, vision, and values
- Promote the Girl Scout Leadership Experience
- Provide timely and effective feedback
- Provide guidance; not directive.
- Be open to new ideas and ways of thinking
- Be willing to invest time, energy, and personal know-how to assist the growth of another person
- Maintain confidences



Promoting the Girl Scout Leadership Experience

Everything we do is aimed at helping each girl develop her own unique leadership skills. The Girl Scout program—what girls do in Girl Scouting—is based on the Girl Scout Leadership Experience, a national model that helps girls become leaders in their own lives and as they grow.



Using the Girl Scout Leadership Experience as our guide:

- Activities are designed to give girls the opportunity to **DISCOVER** themselves,
 CONNECT with others, and **TAKE ACTION** to make the world a better place.
- Activities are GIRL-LED, which give the girls the opportunity to LEARN BY DOING in a COOPERATIVE LEARNING environment.

Implementing the Girl Scout Leadership Experience:

- **Girls First** Build a team relationship. Allow girls to benefit from adult guidance and mentoring.
- **Girl Choice** with younger girls, use girl choice.
- **Journeys & Badges** Use *Journey* and *Girls Guide to Girl Scouting* to facilitate girl development. Use the *Adult Journey Guide*.
- Feedback Solicit girl and parent feedback. Everyone's feedback counts.
- Team Work Work with younger/older troops to help facilitate bridging requirements and girl development. Requirements are found in *Girls Guide* to *Girl Scouting*.



Service Unit Troop Treasurer Description

Summary: Provide sound financial management of the Service Unit Funds

Term: October 1 through September 30

Accountable to: Service Unit Manager and Membership Specialist

CORE COMPETENCIES

- Girl Focused
- Demonstrates personal integrity
- Demonstrates adaptability
- Demonstrates effective oral communication
- Fosters Diversity
- Demonstrates adequate computer skills
- Additional requirements
 - Good standing with GSGLA
 - Belief in the purpose of Girl Scouting
 - Knowledge of goals, objectives, polices of GSGLA
 - Familiar with service unit
 - Team player
 - Communicate effectively
 - o Respect decisions made
 - o Commitment and time
 - Planning, organizing, supervisory skills





Service Unit Treasurer Position Description

SERVICE UNIT TREASURER RESPONSIBILITIES

To the Service Unit:

- Ensure troop leaders know the procedures for using a debit card, the importance of two signatures on a check, and depositing money in a timely manner
- Track records of troop bank accounts, assist with council bank letter and assist with the financial aspect of a troop split or disband
- Provide leaders with the Annual Troop Finance Report and instruction on completing report in a timely manner
- Schedules appointments to collect and review Annual Troop Finance Reports
- Manage all financial matters of the Service Unit, including depositing funds, financial records, independent girl records, and presenting a financial report

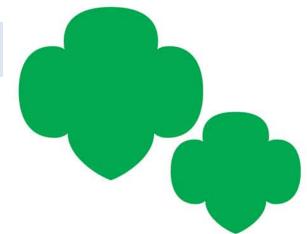
To the Service Team:

- Submits Service Unit and Annual Troop Finance Reports to the Membership Specialist by June 30
- Communicates regularly with Service Unit Manager and Membership Specialist on financial needs of troops
- Attends and participate in service unit team meetings and service unit leader meetings
- Stay informed on current policies, procedures, and guidelines



As a Service Unit Team Member

As a Service Unit Team member, you are part of a team who will promote healthy communication and be a role model to troops, leaders, and girls.



- Service Unit Team Positions
- With your Service Unit Manager





As a Service Unit Team Member - Plan of Work

One of the first items on your to do list, is to work with your Service Unit Manager, Service Unit Team and your Membership Specialist to prepare your Service Unit Plan of Work.

The Plan of Work is a guide for what the Service Unit Team has accomplished in the past year and plans to accomplish in the upcoming membership year.

Items on the list include:

- Service Unit Membership Goals
- Girl Recruitment
- Volunteer Support and Retention
- Reaching out to lapsed girls and adults
- Communication
- Product Sales
- Finances
- Program



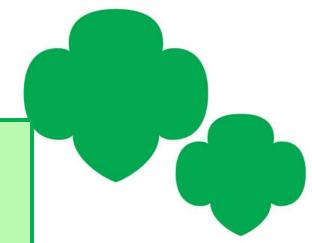
As a Service Unit Treasurer

A Year in the Life of a Service Unit Treasurer - Fall

- Assist new troops with setting up a system to manage their troop finances.
- Work with the Service Unit Team to create a budget for the Service Unit.

Service Unit Annual Budget									
Budgeted Budgeted Budgeted Actual Actual Actual									
	Income	Expenses	Total	Income	Expenses	Actual Total			
Recognitions									
Administration Costs									
Ecampment									
Site Fee									
Food									
Actiity Expenses									
Total Expenses									
Proceeds (\$ per person X the number attending)									
Total Income									
Event -									
Site Fee									
Food									
Actiity Expenses									
Total Expenses									
Proceeds (\$ per person X the number attending)									
Total Income									
Event -									
Site Fee									
Food									
Actiity Expenses									
Total Expenses									
Proceeds (\$ per person X the number attending)									
Total Income									
Other									
					1				
					1				
					1				
OVERALL BUDGET									

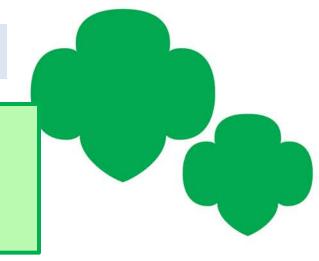




As a Service Unit Treasurer

A Year in the Life of a Service Unit Treasurer – Spring

 The Service Unit Treasurer collects and reviews the Annual Troop Finance Reports



girl scouts greater los angeles		OP/GROUP FINA avable format - Rev. 5/9 ear:			Form No. MBI
BANK ACCOUNT INFORMATION - Use "Tab" key	to advance to next blank space.		_==		
SU# RDE/512 Troop	# 1133				
Froop Level: Daisy Browni	e Junior	Cadette	Senior	Ambassador	x
Bank Name/Branch: Farmers & Merchants B	ank		Account #:		
(Attached last bank statement.)	STIK .		Account #.		
Authorized Signers - 2 nonrelated adults require	d (3 recommended). Please pri	nt.			
Debbie Fountain	,				
2. Barbara White					
3.					
4.					
NOTE: The account <u>must</u> be in the name: Girl So TROOP FUNDS - Use "Tab" key to advance to nex A. BEGINNING BALANCE	t blank space.		X"s with your Tro	· · ·	
3	37.60 + 0	Checking Acct #2 \$	1	(ifapplicable) = \$	\$3,737.60
NCOME	\$		0.00		
Membership Registration Dues	\$		0.00		
uliette Low World Friendship Fund Troop/Group Dues	\$ \$		330.00		
Cookie Program Proceeds	\$ \$	1			
Fall Products Proceeds		\$ 201.25			
Family Partnership – Troop/group Credit	\$		0.00		
Additional money collected (camping, events, et			0.00		
Other money earning projects	\$		0.00		
Other contributions or donation	Š		0.00		
B. TOTAL INCOME				\$	2,159.24
C. TOTAL MONEY AVAILABLE (A+B)				\$	5,896.84
EXPENSES					
Membership Registration Dues	\$		0.00		
uliette Low World Friendship Fund	\$		0.00		
Equipment (flags, books, etc.)	\$		53.29		
Program Activities (trips, parties, etc.)	\$		3,567.21		
Cookouts, Troop Camping	\$		0.00		
Service Projects	\$		0.00		
Program supplies	\$		66.04		
Other expenses	\$		62.56		
D. TOTAL EXPENSES				\$	3,749.10
E. ENDING BALANCE (C-D)				\$	2,147.74
Checking Acct \$)					
	o be determined and lifetime me	embership.			
Balance is to be used for: Trip still t					
Balance is to be used for: Trip still t					
Balance is to be used for: Trip still t	Signature of Troop				Service Unit Manager/Date



As a Service Unit Treasurer

A Year in the Life of a Service Unit Treasurer – Ongoing

- A Bank Account Record Information form
- Maintain financial records of Independent Girl Scouts
- Maintain accurate Service Unit financial records

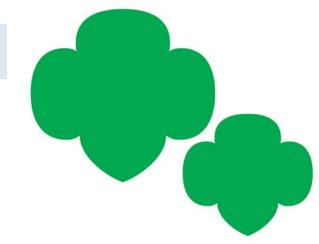




As a Service Unit Treasurer – Financial Ledger

Types of Ledgers:

- Handwritten
- Excel
- Quicken



Financial Categories							
Income	Expenses						
Membership Registration	Membership Registration						
Juliette Low World Friendship Fund	Juliette Low World Friendship Fund						
Troop Dues	Equipment (books, flags)						
Cookie Program Proceeds (net profit)	Program Activities (trips, workshops, parties)						
Fall Product Proceeds (net profit)	Troop Camping						
Family Partnership (Troop/Group Credit)	Service Projects						
Add'l Money (camping, events, workshops, trips)	Program Supplies (crafts, awards, patches, pins)						
Other Money Earning Projects	Other Expenses (bank charges, insurance, uniforms)						
Other Contributions/Donations							



As a Service Unit Treasurer – Financial Ledger

To start: Enter "Beginning Balance" under "Amount" column. This is the only time you will type an amount in this column.

Entries: When filling in each entry make sure to enter amounts in Income/Expenses categories, the "Amount" will automatically enter. Expense items should be negative amounts to total correctly.

Totals: Year to date amounts in each category should automatically update.

	Ledger									
Date	Date Transaction Payee Category Memo					Amount				
Beginning B	alance				\$	150.00				
9/4/2012	Dep	Smith Family	Membership	Payment for Membership	\$	30.00				
9/6/2012	Debit Card	GSGLA	Membership	Membership_Smith Family	\$	(30.00)				
3/11/2013	Dep	Cookie Sales	Cookie Sales	Persaonal & Booth Sales	\$	2,000.00				
4/10/2013	ACH Debit	GSGLA	Cookie Sales	GSGLA Debit	\$	(1,625.00)				
					\$	525.00				

	Income									
	Membership Registration Dues	Juliette Low World Friendship Fund	Troop Dues	Cookie Program Proceeds	Fall Products Proceeds	Family Partnership	Add'I \$ collected (camping, events, etc.)	Other Money Earning Projects	Other Contributions / Donations	
\$	30.00									
				\$ 2,000.00						
				\$ (1,625.00)						
Ş	30.00	\$ -	\$ -	\$ 375.00	\$ -	\$ -	\$ -	\$ -	\$ -	

	Expenses										
	Membership Registration Dues	JL World Friendship Fund	Equipment	Program Activities	Cookouts, Troop Camping	Service Projects	Program Supplies	Other Expenses			
5	(30.00)										
5	(30.00)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			

As a Service Unit Treasurer – Binder and Tabs

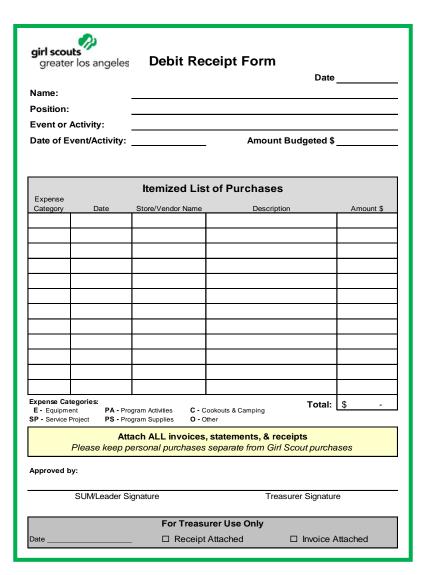
Suggested binder tabs:

- Bank Statements
- Expense Records
- Deposit Records
- Treasurer Reports
- Troop Bank Account Records
- Troop Contact Information
- Independent Girl Records
- Service Unit Bank Account Information





As a Service Unit Treasurer – Expense Record Forms





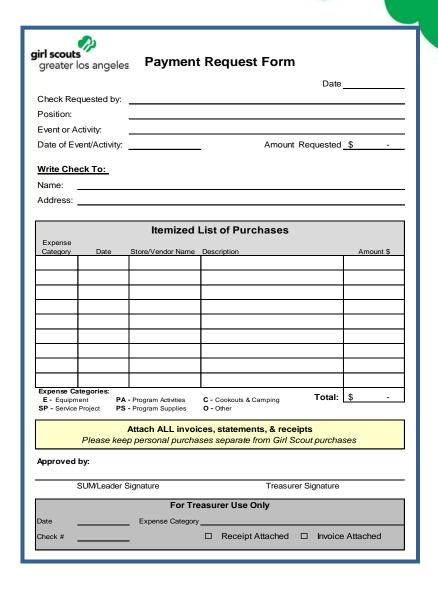
To record purchases made the Service Unit with debit card. After purchase is made, the form, receipts, and debit card are returned to the Service Unit Treasurer.



As a Service Unit Treasurer – Expense Record Forms

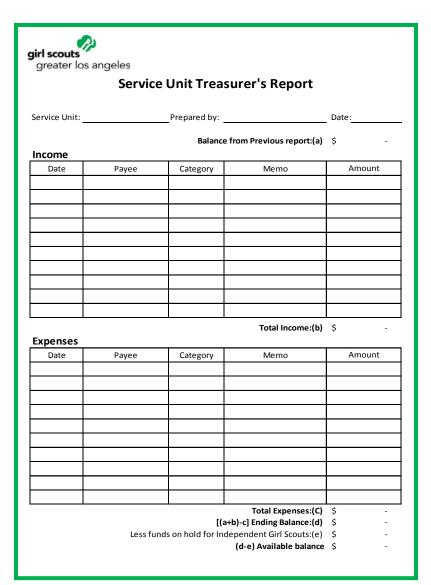
Payment Request Form

Use for reimbursement by check, receipts must be included with the form.





As a Service Unit Treasurer – Treasurer's Report





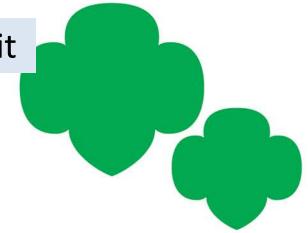
Treasurer's Report

The Service Unit Treasurer should present the Service Unit's monthly financial activity at the Service Unit Leader Meeting each month.



As a Service Unit Treasurer – Record of Deposit

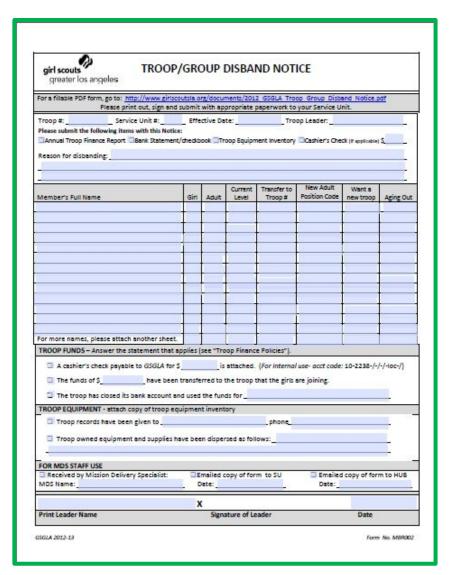
Record of Deposit Used to keep track of each deposit made.

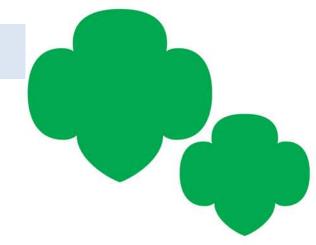


Troop/Group Record of Deposit Troop/Group #: Category Total Deposit Check #(s) Cash \$1 X \$2 X \$5 X \$10 X \$20 X \$50 X \$100 X Sub-Total Coin \$.01 X \$.05 X \$.10 X \$.25 X \$.50 X \$1.00 X Sub-Total \$ Check Total \$ Total Rcv'd \$



As a Service Unit Treasurer – Disband Troop





When a troop disbands, the following forms are required:

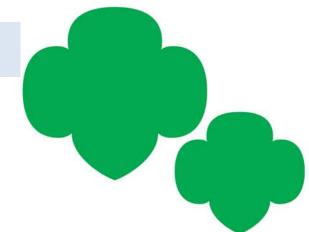
- Troop Disband Notice
- Current Annual Finance Troop Report
- Current bank statement
- Troop ledger
- Inventory of property

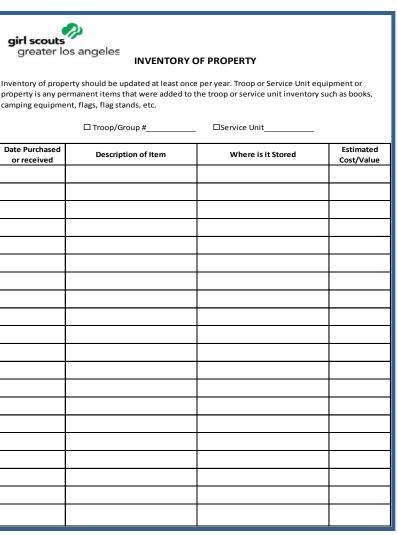


As a Service Unit Treasurer – Split Troop

For a fair division of funds, the troop must provide:

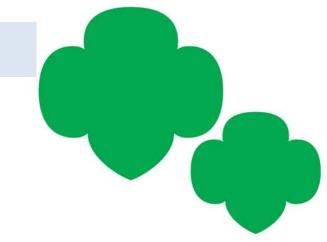
- Current Annual Troop Finance Report
- Current bank statement
- Troop ledger
- Inventory of property







As a Service Unit Treasurer – Forms



This is a list of the forms we discussed

Service Unit Annual Budget

Service Unit Troop Finance Information

Bank Account Information

Excel Ledger

Debit Receipt Form

Payment Request Form

Monthly Treasurer's Report

Troop/Group Record of Deposit

Annual Group/Troop Finance Report

Disband Troop Form

Inventory of Property Form



As a Service Unit <position> - Recognitions

As part of the service unit team, it is part of the teams responsibility to help recognize your fellow volunteers for outstanding contributions to the service unit and council.

Council level awards are due to the Council the second Friday in January.















Recognizing Adults

GSGLA holds a recognition ceremony in conjunction with the annual meeting



Resources

A very important part of what you can do is to help leaders with resources and learning opportunities. Become very familiar with everything on our website. Here are some links to get you started:

Website:

Adult Learning

Become a Leader or Volunteer

Cool Tools

Family Partnership

Forms

On-line Event Calendar

eBiz

Pixie List – GSGLA classifieds

Registration information

Safety Activity Checkpoints

Volunteer Essentials

Volunteer of The Month



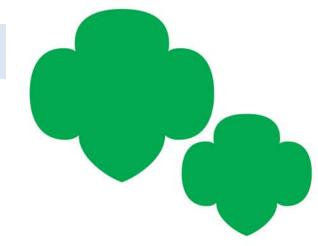
Volunteer Essentials

- Troop finance information
- Activities needing approval
- Council Policies
- Adult Learning requirements
- Journeys and badges
- Planning a girl-led environment

Safety Activity Checkpoints

When preparing for any activity with girls, leaders should always begin with Girl Scout Safety Activity Checkpoints written about that particular activity.





MANAGING APPROACHES

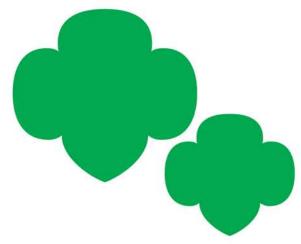
WORKING WITH LEADERS AND VOLUNTEERS

EBIZ TUTORIAL

WHAT I NEED TO TAKE....



GSGLA Go Teams in Cooperation With Council Staff Invite Service Unit Team Members to:



Service Unit Team Position Orientations

All position orientations will run 6:30 p.m. to 8:30 p.m.

Sept. 10: Service Unit Recruiter

Sept. 12: Service Unit Troop Consultant

Sept. 17: Service Unit Registrar

<u>Sept. 19: Service Unit Treasurer</u>

Oct. 1: Service Unit Cookie Chair

Oct. 3: Service Unit Cookie Mentor

Oct. 8: Mediator Squad Rep (Dispute Resolution Team Member)



Go Teams

goteams@girlscoutsla.org

Adult
Recognitions

Kristine Wiscarson

Girltopia Volunteers Communications

<u>Cindy Bernsdorf</u>

Dispute
Resolution

Kristine Wiscarson

Travel **Tammie Scott**

Gold Award

Lynn Mack Costello

Special Events &
Troop Money Earning **Debie Wakeland**

Troop Support

Service Unit
Support

<u>Yvonne</u>
<u>Schueller</u>

Business
Smarts
(Cookie Program)
Teri Proffitt

Environment and Outdoor Adventure

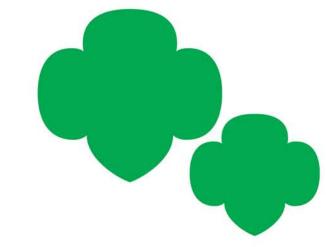
Sandra
Hardy

Wellness and Healthy Living (1st Aid/CPR) Julie Miller

Adult Educator Support *Lynn Mack Costello*

Curriculum <u>Linda Harmon</u>





Congratulations!

You have completed

Service Unit Treasurer Orientation



