

Leadership Summit Conference Packet



Dear Service Unit Leaders,

Thank you for taking on this vital role in your service unit. Your dedication to girls and Girl Scouting is critical in the success of our mission to build girls of courage, confidence, and character who make the world a better place. The expertise, interests, skills, and life experiences of our volunteers are essential to shaping fun and enriching leadership experiences where each Girl Scout can transform her ideas into action, turn her questions into a venture, and grow her confidence through practice. These are exciting times for Girl Scouting. Your commitment and passion to the Girl Scout Movement are indispensable. Please join us in celebrating Girl Scouts of Utah, one voice, one movement, one hundred years! We hope you enjoy this unique Leadership Summit Experience!

- 2020 Leadership Summit Committee

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We would like to give a special thank you to all of the volunteers and staff who have been fundamental in planning and executing this event and were flexible and poised through unexpected and ever changing circumstances.

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Leadership Summit 2020 Schedule

Friday, August 28

6:00 – 6:30 pm	Welcome	
6:30 – 7:30 pm	Campfire Chats: Visit different rooms where staff members will answer your questions on that topic.	Product Sales
		Programs and Outdoor Programs
		Finance, Customer Care, and the Shop
		Volunteer Support and Membership
		Marketing
		Governance
6:30 – 7:30 pm	Team Builders: 30 minute team builders if your Service Unit has pre-registered	100 Years of Girl Scouting Escape Room
		Service Unit Family Feud
7:30 – 8:30 pm	S'mores and more: Come enjoy a s'more, see staff and volunteers share their talents and maybe even share your own!	

Saturday, August 29

9:00 – 9:50 am	Key Note from Lisa Hardin-Reynolds and Ruth Strawser	
10:00 – 10:50 am	Workshop Session 1	Let's Work It Out
		Tools for Your Expert Troop Leaders
		From 1 to 92: Communicating with Every Generation
11:00 – 11:50 pm	Workshop Session 2	Holding Can't Miss Meetings
		Recruitment 101
		Molding Super Stars
12:00 – 12:50 pm	Lunch: Take lunch on your own or watch a few of our favorite GSU and GSUSA videos.	
1:00 – 1:50 pm	Workshop Session 3	The Who's Who of Your Service Unit
		Service Unit Stretch
		A Bird in the Hand: Recognizing and Retaining Volunteers
2:00 – 2:50 pm	Position Networking: Volunteers will have to opportunity to network with volunteers who share similar responsibilities in other Service Units.	
3:00 – 3:30 pm	Closing	
3:30 – 4:00 pm	Service Unit Team Planning Time	

Workshop Descriptions

Let's Work it Out!	Differences of opinion, disagreements, and conflicts are inevitable parts of life. When they are handled constructively, they can actually enhance communication, improve relationships, and achieve a higher quality result or outcome. However, when disagreements or conflicts escalate, they interfere with the ability of adults to ensure a high-quality Girl Scout Leadership Experience for girls. Through this learning opportunity, you will learn how to effectively manage conflict to provide the highest quality Girl Scout Leadership Experience for all girls and adults.
Tools for Your Expert Troop Leaders	Learn the tools that can take your troop leaders to the next level! This workshop will cover various tools including Volunteer Toolkit, Google Docs, and much more!
From 1 to 92: Communicating with Every Generation	Do you ever feel like you aren't connecting with families and volunteers who are older or younger than you? This is the workshop for you! Learn how each generation thinks and communicates differently and develop strategies for bridging the gaps.
Holding Can't Miss Meetings	Turn your Service Unit meetings into "can't miss" events for your volunteers! High quality Service Unit Meeting translate into successful Service Units where volunteers feel a sense of belonging. Learn strategies and ideas for improving attendance at your regular Service Unit meetings and leave with a plan for creating top notch meetings.
Recruitment 101	Discover the fall recruitment plan and tools that are part of the new national campaign. Also learn ways you can include recruitment at the girl, parent, troop leader and service unit levels. There will be recruitment ideas for everyone! You are sure to leave with at least one idea, but hopefully dozens more!
Molding Super Stars	Coaching and mentoring volunteers is essential for turning volunteers into Super Stars! Attend this session to learn strategies for supporting volunteers as they grow in their Girl Scout positions. Discover the difference between coaching and mentoring and when to use each strategy. Leave with a foundation for helping volunteers grow and thrive in Girl Scouts.
The Who's Who of Your Service Unit	Come learn how to access your Service Unit roster in Looker and what features you can use to explore who's in your Service Unit. Not familiar with Looker or just looking to learn more? This training for you!
Service Unit Stretch	Ready for a challenge? Come learn everything there is to know about the Service Unit Stretch and how your Service Unit can earn rewards by participating!
A Bird in the Hand: Recognizing and Retaining Volunteers	It's easier to keep an existing volunteer than it is to recruit a new one. Learn how to recognize your volunteers in a way that makes them feel valued and create a plan for retaining volunteers year after year.

Molding Volunteer Super Stars (with Cars)

Therapist

explores
underlying issues
stopping you
from driving the
car



Therapy is a treatment that helps someone feel better, grow stronger, etc.

Counselor

listens to your
anxieties about
the car



A **counselor** is a person whose job is to give advice to people who need it.

Mentor

teaches what they
know from their
experience of
driving cars



Mentorship is a relationship/partnership in which a more experienced & knowledgeable person helps to guide a less experienced or knowledgeable person.

Consultant

tells you what car
to drive, how fast
to drive and
where to fuel it



Consultant: Experienced professional who provides expert knowledge. He or she works in an advisory capacity.

Coach

encourages &
supports you &
asks challenging
questions to help
you get a new
perspective in car
driving



Coaching is a method of achieving set goals. The coach helps you set a goal and find the best way to achieve it. The coach asks questions to help you find the solution to your own tasks.

Molding Super Stars

Coaching:

Showing a new leader the ropes of Cookie Sales or going through a journey. There is more of a specific goal in mind for the time spent. Generally less time is spent together.

Mentoring:

Guiding leaders to be well versed in the Girl Scout way.

Leaders become their own resource and know where and who to turn to for answers. This is a continued guidance and should be fostered by the whole service unit team. All leaders should feel supported and nurtured through their growth.

Example Mentoring Plan:

Start by identifying what the leader does well and what needs they have.

Do they prefer online links to research themselves or would they like physical handouts?

Find the motivation. What gets them moving?

Is it all about their girl? Is it connecting with other leaders and the community?
Are they competitive with getting swag?

Affirm their value.

After a while pick out strengths that they have and point them out. Showing that you are paying attention and see their efforts will help build the connection.

Follow-up

Start with a monthly check in (outside of the leader meetings). As the leaders get more comfortable move to every other month check-ins and even out to sporadic. But keep in contact on their progress. Make sure that the connection is still building.

*Make a process that is all your own. Take these examples and expand and/or change them as best for your team and you.

Conflict Management

Levels of Conflict

Level 1: Spark

- Annoyance
- Not much at stake
- Not a pattern
- Trust has not disappeared

Level 2: Flame

- Low-level anger
- Repeated disputes
- Less cooperation
- Less trust

Level 3: Blaze

- Sustained anger
- Coercion/distancing
- Gossiping & taking sides
- Interferes with role

Level 4: Full Crisis

- Threaten safety and health
- Result in legal action
- Result in negative media
- Cause opposition from community

Approaches to Conflict

Proactive

- Encourage learning
- Mentor new volunteers
- Direct to website/publications
- Define roles

Reactive

- Hold a resolution meeting
- Ask “why?” five times
- Use I-statements
- Be an active listener

Creating and Using Google Docs via Google Drive

1. Set up a Google account if you don't already have one. You don't have to change your email address to do this.
 - a. Search for: **Create a Google Account**. (URL should begin with <https://support.google.com>)
 - b. Click on **Step 1: Create a Google Account** and follow the directions.
 - c. If you want to use your current email address, be sure to click on **Use my current email address instead**. It will ask you for the email, to sign in with your password, & go through a few verification steps.
2. To go to Google Drive – follow these steps:
 - a. If you have Gmail, locate & click on the small **grid of 9 dots** (3 rows x 3 columns of dots) in the upper right-hand corner of your Google home page.
 - b. If you are using a non-Gmail email, go to www.google.com. Then click on the **grid** described in Step 2a.
 - c. Click on **Drive** (colorful triangle).
3. To create a Google Doc – follow these steps in Drive:
 - a. Click on the colorful **+ New** (in the left column near the top)
 - b. Select **Google Docs** from the menu that appears. A new blank document will open in a new window.
4. To name your new document:
 - a. Click on the upper left words: **Untitled document**
 - b. Begin typing the name you choose for the document.
5. To add content to your document:
 - a. Click on the flashing cursor in the main open area and begin typing.
6. To share your document:
 - a. Click on **Share** in upper right-hand corner of page.
 - b. In the dialog box which opens, you can share the Doc in 2 ways:
 - i. Either add names from your contacts where it says “Add people and groups” (this is easy if you’ve already formed a group in your contacts) OR
 - ii. Click on “Copy link” and opt for either “Anyone with the link” (email the link to people) or “Anyone on the internet with this link.”
 - c. Anyone who receives the link from you can open the document and add to it, make comments, etc. You will immediately see changes in your version of the document.
 - d. Explore the toolbars that appear under your document name to find out other options for your document. For example, by clicking on the + sign, you can add a comment.
 - e. If you can't quickly find the way to make the edit you want, just Google it. For example, “How to change the page orientation in a Google Doc” will direct you to the right menu on the toolbar.

Service Unit Meeting Agenda

Date:

Group Norms:

- Honor the facilitator
- One mic
- Make spack, take space
- Stay solution-oriented
- Speak with intent
- Assume best intent
- Eye on the misison
-

Agenda		Next Steps
<u>Time</u>	<u>Topic</u>	
	Welcome - SU Manager	1.
	Girl Scout Promise & Law - Communications Rep	2.
	Introductions - Recruiter/Troop Mentor	3.
	Finance Report - Finance Rep	4.
	Report from Council - SU Manager	5.
	Event Report - Event Rep	6.
	Product Program Report - Product Prog. Rep	

Meeting Notes

Girl Scouts of Utah | 2020 – 2021

Council Events

September – October | Fall Recruitment
October | Utah Day of the Girl
November | Recognition of Excellence
February – April | Spring Recruitment
April | Annual Meeting
June | Cookie Party
June | Girl Scout Lagoon Day
June 17 – 20 | Camporee
August | Camping for a Cause

Dates to Remember

September - October | Fall Product Program
December | Camp Registration
January | Cookie Program Begins
February | Troop Camping Registration
March | Cookie Program Ends
March 31 | SU Appreciation Awards Due
May 1 – June 15 | Early Renewal (Re-registration)
June 30 | Troop Finance Reports due to SU
July 31 | SU Finance Reports due to Council
July 31 | Council Level Recognition Nominations Due
August 1 – September 30 | On-Time Registration
September 30 | End of Girl Scout year

Service Unit Meeting Schedule

Council Connect Meetings

Last Wed. of the month:

- September 30
- November 18
(GSU Closed 11/25)
- January 27
- February 24
- March 31
- May 26
- June 30
- July 28

Annual Girl Scout Activities

October 1 | New Girl Scout year begins
October | Investiture and Rededication
October 31 | Juliette Gordon Low's Birthday
February 19-21 | GSUSA Cookie Weekend
February 22 | WAGGS World Thinking Day
March 7 – 13 | Girl Scout Week
March 12 | Girl Scout Founder's Day
April 22 | Girl Scout Leader Appreciation Day
May | GSUSA Bridging Weekend
June | Girl Scouts Love the Outdoors
September | Girl Scouts Love State Parks

Meetings for ALL Leaders

Troop Leader Tips

Second Saturday of the month:

- September 12
- October 10
- November 14
- December 12
- January 9
- February 13
- March 13
- April 10
- May 8
- June 12

Regional SU Manager Meetings

- October 28
- April 28

Leadership Summit

- August 27 - 28

SERVICE UNIT PROGRAM OVERVIEW

One of the Service Unit's roles is to plan and host events and activities for girls in their area. One way to measure a Service Unit's success is through Girl retention – that is, how many girls remain members from one year to the next. The type and variety of programming that a Service Unit offers is an important factor in retaining girls. This is reflected in the heart of our mission as an organization: provide girls with high quality experience that give them the **courage**, **confidence**, and **character** to make the world a better place. We strive to do this through the Girl Scout program.

All Girl Scout Program (events, activities & materials) should be designed to achieve the GS Program Outcomes, which are our promise to girls and their families. By making one or more of these outcomes your goal, any activity can become a Girl Scout program.

1. **Discover:**

- Girls develop a strong sense of self
- Girls develop positive values
- Girls gain practical life skills
- Girls seek challenges in the world
- Girls develop critical thinking skills

2. **Connect:**

- Girls develop healthy relationships
- Girls promote cooperation and team building
- Girls can resolve conflicts
- Girls can advance diversity in a multicultural world
- Girls feel connected to their communities, locally and globally

3. **Take action:**

- Girls can identify community needs
- Girls are resourceful problem solvers
- Girls advocate for themselves and others, locally and globally
- Girls educate and inspire others to act
- Girls feel empowered to make a difference in the world

All events and activities for girls should include the three processes for achieving these outcomes:

- Girl-led
- Learning by doing
- Cooperative learning

GENERAL INFORMATION ON GIRL EVENTS

Service Units should develop a calendar of events to give Troops an opportunity to plan their Troop schedule. Many Service Units offer specialized programming aimed at a certain population of girls such as Badge or Journey in a Day; others are open to all Girl Scouts in the area such as a Renewal Party or World Thinking Day celebration.

Each event should have an Event Representative who has the skills needed to execute such an event. The Service Unit team should develop an event plan and estimated budget to the Finance Rep prior to the event. This also allows experienced members of the Service Team to provide input and assure proper budgeting and successful planning based on lessons learned from previous events. Cadette, Senior or Ambassador Troops that put on events may also have a Girl Event Coordinator who can serve at the side of the adult and take the lead where appropriate.

Events should break-even financially, unless hosted by a Troop that announces in advance that the event will be a fundraiser. In this case, the recipient of the profits (which should be modest, usually a dollar or two per participant) needs to be clearly identified on all fliers and announcements. While Girls cannot raise funds for other Scout funds (such as the Juliette Low World Friendship Fund), donations of items can be collected for outside groups at events (such as a canned food drive for the local food bank). All money should be run through the Service Unit account unless it is a Troop fundraiser. All original receipts must be saved for a closing report that is to be filed within a month of the event with the Service Unit Finance Rep. (See the Section on Finance for more details)

The necessary planning for events can take a lot of organization and it can help to have another person to double check your work and help make sure all the bases are covered. You can assist by using the Event Planning Worksheet provided in the appendix. No one wants to be micro-managed, but know what questions to ask will help you figure out how the event is progressing.

OLDER GIRL PROGRAM

It is important to remember that as girls become older, the benefits they receive by participating in Girl Scouts increase. Middle school/Jr High and High school can be times when multiple stressors are presented to girls. Being in Girl Scouts during those years will help them navigate the challenging time. By providing them with a peer group that supports making positive choices, planning for the future and feeling good about themselves, a huge difference can be made in girls' lives. Let's do everything we can to make sure that happens.

Service Units should organize at least one event per year just for Cadette, Senior and Ambassador Girl Scouts to increase retention and make the older Girl Troops feel more connected to the Service Unit. Because older girls provide a great deal of support to the Service Unit, it is important to make sure that their needs are met as well.

If your Service Unit is small, or has only one or two older Girl Troops, it can be useful to plan these events in partnership with neighboring Service Units. The basic planning steps are the same for any other grade-level specific event, the girls themselves should be an integral part of the planning process.

A Service Unit Program Team should include a GAB Advisor to focus on events for older girls and/or to support and answer questions, and work with other Service Units to organize events. This could be a current or former older girl leader, but consider appointing an Ambassador girl and get the real scoop on what kind of events teens want to do!

A GAB Advisor will want to become familiar with elements of Girl Scouting that are particular to this age group:

- **Girl Scouts Travel Pathway or *Destinations*:**
A program that provides the opportunity for Girls to travel nationally and abroad. Leaders should be willing to promote this program to Girls at the Troop and Service Unit levels
- **Program Aid (PA), Counselor in Training (CIT), Wrangler in Training**
- **Silver and Gold Award Processes**
- **Older Girl Camp Opportunities**
- **Council Girl Advisory Board Opportunities**
- **GSU News Crew Opportunities**
- **Council Governance Opportunities:**
Serving as a Council Delegate or National Delegate

CREATING CAMP EXPERIENCES

A Service Unit camping experiences that are planned and carried out by the Service Unit for girls and Troops include: Never the Same Weekend and Day Camp. This is a wonderful opportunity for all the Troops in a Service Unit to camp together and allow newer Leaders to take their girls camping in a supportive environment before going out on their own. Service Units are encouraged to reserve the dates for NTSW, and may plan for any time of the year.

Never the Same Weekend (NTSW): 24 hours or more with planned activities

Day Camp: 3 days of continuous planned activities

- Establish basics with the leadership of the service Unit, including when to hold the event, and develop initial goals for the planning team.
- Survey leaders for program and date preferences.
- Submit date request to GSU for approval.
- Continue communicating with the Service Unit team (plan, timeline, program and budget).
- Secure the core staff needed for program success.
- Ensure that at least one adult for each troop has training needed to take girls on overnight activities including Troop Camp Training and First Aid and CPR, and that these adults will be able to attend the event.
- Accept registrations and final payments from Troops and girls.
- Ensure that the forms are complete and signed for all Troops/girls
- Provide additional support to new Leaders to be successful in Troop preparations.
- Communicate final confirmation and plans to council as required.
- Prepare and implement program objectives.

SERVICE UNIT EVENT PLANNING FORM

Procedure:

1. Once a Troop or volunteer is appointed to run an event for the Service Unit, they must submit this completed form to the Service Unit Finance Rep outlining their preliminary plan and budget for the event.
2. Once the preliminary plan has been approved by the Service Unit Team, the Troop or volunteer is permitted to make deposits or reservations for the event as needed.
3. An event announcement and/or registration form must be developed and submitted to for approval before distribution.
4. All funds collected for the event must be deposited into the Service Unit account.

Activity/event title:	
Proposed location:	
Proposed Dates:	
Event Director:	
Phone:	
Email:	
Training required:	
Training completion date:	
Event/activity description:	
Safety Activity Checkpoint:	
# of Girl attendees (estimate):	
# of Adult attendees (estimate):	
Proposed cost per person:	
Service Unit #:	
Service Unit position title:	

Expense description:	Amount:

Approved by: _____

EVENT EVALUATION & FINANCIAL REPORT

Activity/Event:	
Location:	
Event Director name:	
Event Director email:	
Event Director phone:	

Cost per Girl:	
Cost per Adult:	
Discounts:	
# of Troops:	
# of Service Units:	
# of Girls:	
# of Adults:	
Age/program level:	
Troop #:	
Community agencies involved:	

Describe the successes of the event:
Describe the challenges of the event:

Event coordinator's signature: _____ Date: _____

Service Unit Facilitator signature: _____ Date: _____

For Troop events: Attach receipts to the form and keep with your Troop records for end of the year reporting. All income and expenses must be reported annually to your Service Unit and GSU.

For Service Unit events: Event must be reported on the annual service unit financial statement. Submit this report, any unused funds, and original receipts to the Service Unit Manager or Treasurer within 10 days after the event.

SERVICE UNIT FINANCE OVERVIEW

The **Service Unit Finance Representative** is responsible for ensuring that all SU financial transactions, records and reports are conducted according to GSU policy and procedures.

- SU Finance Reps should have the ability to oversee, track and report on the expenses and income of their service unit to meet the standards of GSU
- SU Finance Reps should refer to the SU Finance Reps Position Description for an outline of the general responsibilities associated with the position
- Other resources include: **Safety Activity Checkpoints**
- Service Units Finance Reps are strongly encouraged to assist in training and support Troop Leaders with managing Troop money by providing an annual mini-training at the SU meeting

Budgeting:

The SU Finance Rep, with the support & collaboration of the Service Unit Manager and/or other members of the SU Team should:

- Review the proposed plans for the upcoming year to assure that the planned expenses do not exceed the income for the year.
- Monitor spending and assure that all those who use service unit monies understand and meet the expectations and responsibilities that come with using these funds.

Reporting:

Each Service Unit Team Meeting should include a brief financial report from the Finance Rep, summarizing financial activity of the past month and how actual income and expenses are progressing. In addition, the SU Finance Rep is required to submit an annual report to GSU. The report must meet basic accounting standards, as it will be provided to independent auditors for the annual audit of the Council's finances.

Requirements for this report are as follows:

- The SU Treasure must complete a GSU Service Unit Finance Report and submit it to council by July 31 of each year. You can find this report on the GSU website or contact your Volunteer Support Specialist for a copy.
- A detailed listing of all expenses and income must accompany the SU Financial Report
- Finance Reps are encouraged to use the "SU Finance Income & Expense Ledger and the Event Evaluation & Finance Report to list transactions or create their own versions which provide the same information. Copies of both are at the back of this manual.
- Receipts for all transactions must be submitted along with the annual finance report.
 - Each receipt must be original. SU Finance Reps should warn in advance that they cannot submit photocopies of receipts for reimbursement.
 - Each receipt must be itemized on the ledger and additionally on the event report if it is for an event.
 - Each receipt should be for the SU-related purchase only. Personal and/or Troop related purchases should be separate.
- For security reasons, volunteers need to black out any personal account numbers before submitting receipts
- SU Finance Reps need to work closely with all members of the team to assure that receipts and deposits are submitted as soon as possible after the event. This will help

the Finance Rep to complete and submit the annual finance report with questions about the annual report or requirements.

- **REMINDER:** VENMO transactions are prohibited within Girl Scout bank accounts.

Please consult the council Finance Department with questions about the annual report or requirements.

SERVICE UNIT ALLOCATION FUNDS

Service Units are not independently recognized non-profits; therefore, they are not permitted to engage in separate fundraising activities. To cover expenses incurred during the course of doing business, GSU provides service units with an annual allocation that which is calculated based on the number of boxes of cookies sold during the cookie program.

Allocation of funds MAY be used on the following expenditures:

- **Girl Programs:** girl programs or events such as Day Camp, World Thinking Day, Cookie Rally, badge or skill-related workshops.
- **Recruitment/Retention:** supplies for recruitment or retention events.
- **Adult Recognition:** recognition of Adult Volunteers and Leaders at the Service Unit level.
- **Girl Recognition:** recognition of Bronze, Silver or Gold Award recipients.
- **Administrative Costs:** such as postage, stationery, meeting supplies, copies, rental of meeting space for volunteer meetings.
- **Food and Beverage:** for girl events and volunteer meetings or trainings.
- **Service Unit Team Training:** registration fees for council-sponsored trainings or other training that benefits the SU as a whole (for example Leadership Summit).

Allocation Funds may NOT be used on the following expenditures:

- **Registration Fees:** for adults or girls to attend national or council-sponsored events or travel programs.
- **Activity Scholarships/Sponsorships:** council provides a number of scholarships and sponsorships in the way of camperships, financial aid, and other types of scholarships for girls to attend a variety of girl related programs.
- **Mileage:** mileage costs for volunteers.

In order to ensure that girl money is not used for adult expenses, allocation expenditures should not exceed the amount provided by the council each year.

Please contact the GSU Volunteer Support Manager if questions arise regarding the use of allocation funds.

SERVICE UNIT EVENT FUNDS

Service Unit events for girls should fit within the SU annual budget.

- Program related representatives should submit an estimated budget to the Service Unit Finance Rep for approval before any spending has occurred. The Service Unit Manager may want to assist the Finance Rep in reviewing these budgets.
- Event budgets should follow the guidelines laid out in the Event Representative's training, and should be limited to only those costs that are necessary in order to carry out the event since these costs will be directly passed on to the girls.
- Event Evaluation & Financial Report (with original receipts attached) for all events held during the year must be submitted to the Service Unit Finance Rep in a timely manner. The Service Unit Finance Rep may set their own deadline to assure that they are received in time to be included in the annual Service Unit Finance Report.
- If an event is a Troop fundraiser, and the Troop is using its own funds for the event, an estimated budget is not required. However, Troops must be approved for a Money-Earning Activity prior to the activity and must notify all participants that the event is a fundraiser and who will benefit.

TIPS FOR SAFEGUARDING GIRL SCOUT FUNDS AND ACCOUNTS

A Girl Scout bank account is both a privilege and a responsibility. It allows for easy, safe control of Service Unit and Troop funds, and provides a record of all financial activities so that budgeting and reporting task can be handled easily. It does require diligence in handling of the documents and records so that the Troop has maximum benefit from their efforts and minimum exposure to fraud and other losses.

Safeguarding account records and documents is the best way to prevent access to Troop funds:

- Know where your checks and records with account numbers and signatures are at all times. Keep them in a safe place.
- Allow access to these documents and records only to signers on the account.
- Do not throw away anything that lists account numbers or shows signatures. These should be shredded or burned to destroy information. If you do not have a way to shred or burn these papers, tear them in such a way as to make the information illegible.
- Know when your statement should arrive in the mail each month. If it does not arrive on time, notify the GSU Banking Coordinator so that they can help follow up on it and preventing it from falling into the wrong hands.

- Review your statement carefully every month to be certain that all activity is correct. Notify the GSU Finance Department immediately of any suspicious transactions.
- Balance your account each month and notify the signers of any errors they have made.

TROOP FINANCES

The Service Unit Finance Rep should offer support to Troops by presenting tips, tools, and training to Leaders and/or Troop Treasurers on managing troop finances. This is recommended as an annual mini-training scheduled within the SU meeting.

Troop Treasury Guidelines:

- Every Troop must have an approved GSU checking account that must be set up through Wells Fargo (except where there are no Wells Fargo branches in your community).
- Troops must keep a detailed record of all troop income and expenses and submit an annual Troop Financial Report (TFR) to the SU and council by the end of June. This financial report is a condition of GSU's non-profit status and is required of all troops whether they are continuing into the next year or not.
- Troops should regularly provide each parent with a detailed financial report of all Troop income & expenses so that parents can see how the money is being spent over the course of the year.
 - As part of the annual planning process, the girls and Troop Leaders should work together to create a budget for the year. Budget items to consider include: national membership dues, new program materials (Journeys, badges, or handbooks), field trips, adult training costs, program events, troop camping, etc. The budget should be incorporated into the goal-setting process for girls leading up to the annual cookie sale. All these expenses should be considered as the girls are setting their cookie goals—not just one or two events.
- The Girl Scout Cookie Program serves two purposes: it's both a program activity and a fundraiser. Cookie sales offer girls the opportunity to develop new skills in marketing, project management and budgeting. The funds raised from the sale will provide the **primary** financial support for Troop activities for the year. As a result, parents should not be expected to make up for shortfalls or bear the burden of Troop program expenses.
 - Special training on managing cookie income is provided for Troop Cookie Managers before the sale begins.
- Troop Dues are small amounts of money that will supplement the Troop's treasury. The exact amount should be determined by Leaders, parents and girls and may depend on the grade-level of the girls and the extent of Troops activities. Dues should be a small enough amount that a girl can earn the money by doing chores around the house or pay it out of her weekly allowance. As a general rule, dues should total about \$20-\$40 per year per girl.

- Financial Assistance is available through GSU for girls who might otherwise not be able to participate in Girl Scouts. Check the Volunteer Essentials for more information. Please ensure that all parents are aware that this assistance is available.
- Additional fundraisers are sometimes needed to supplement Troop activities. Safety Activity Checkpoint and Volunteer Essentials provide guidelines for Troop Money-Earning activities and how to obtain approval for them.
- Keep all receipts for 6 months to a year after the annual report has been submitted in case of an audit. Ideally, receipts (particularly those where reimbursement is needed) should not contain personal purchases, but should show Troop expenses only.
- Additional information is available in the financial section of the Safety Activity Checkpoint and Volunteer Essentials for guidance on budgeting and handling Troop money.
- **REMINDER:** VENMO transactions are prohibited within Girl Scout bank accounts.

It is suggested that the Troop create a notebook and use it to record all income and expenditures, hold receipts and deposit slips and make notes of dues payment and the Troop's annual budget. Benefits of this will include:

- Finances will be easily available for viewing at any time by just about anyone – parents, girls, and council.
- If a change in Finance Rep is needed mid-year, or girls move to other Troops, you have the records all in one place.
- Girls can be easily involved in understanding finances when it is all in one place.
- Reports are due each year - by creating a system, you'll have all the information you need at your fingertips.
- If questions arise about where Cookie money is spent, you will be able to present the information to anyone at a moment's notice.
- Having a system will make it easier to involve other Troop Supporters if they can readily see what is involved in the job.

Forms for Troop Use:

- **Detailed Cash Record:** is an effective check registry that allows easy tracking of money in the categories that must be reported on at the end of the year.
- **Troop Finance Report:** this form and a copy of the last bank statement must be submitted to the Service Unit every June.

Troop Leaders should have the Service Unit Finance Rep and the Service Unit Manager contacts readily available.