

# Service Unit Finance Representative

## Summary

The Service Unit (SU) Finance Representative plays a significant role by ensuring Girl Scout funds are maintained and recorded properly, completely, and timely, as well as creating a positive culture of financial literacy and financial health. This position is responsible for year-round management of SU funds and financial records. The Finance Representative provides financial support, guidance, reassurance, and education for all volunteers within the SU.

## Responsibilities/Duties

- Be familiar with all GSUSA and Girl Scouts of Utah (GSU) policies and procedures regarding Girl Scout finances.
- Ensure SU and troop funds are used only for Girl Scout related activities.
- Educate SU and troops about:
  - Budgeting and recording Girl Scout funds
  - Determining appropriate fundraising functions
- Support SU and troops in submitting proposals for fundraisers to GSU by reviewing and signing proposals prior to their submission to council.
- Support GSU by encouraging SU and troops in participation in the Annual Council Giving Campaign.
- Utilize Looker\* to obtain SU membership information (troop and contact information).
- Report to council staff of any SU and/or troop financial issues or concerns.

## Service Unit Finances

- Involve in establishing, monitoring, and adjusting SU's annual budget.
- Co-signer on all SU level bank accounts.
- Maintain the day-to-day custodianship of the SU checking account:
  - Prepare and make bank deposits into the SU bank account.
  - Prepare and disperse payments from the SU bank account after receiving appropriate approval and receipts.
  - Reconcile the SU bank statement within 10 days of receiving it.
  - Provide to all SU team members a monthly financial statement that includes monthly expenditures and deposits, and the monthly bank statement.
- Provide a SU financial report at each SU leader/volunteer meeting.
- Coordinate with the SU team members in managing event/activity budgets and activity credits, if applicable.
- Review financial reports for all SU and council-sponsored events/activities within two weeks of event.
- Complete the SU Annual Financial Report (report located in the Forms and Resource section on council's website). Submit the report with the SU Budget Worksheet (template provided in Service Unit Planning Packet) to GSU Finance Department by June 30 of each year.
- Confirm allocated funds are used appropriately.

- Assist council staff with ensuring that all troop and SU funds are being used and all accounts are being managed appropriately.
- Keep all SU financial records including receipts for four (4) years – current year and three (3) previous years. Destroy (shred) older documents.

### **Troop Finances**

- Mentor and support troop leaders/volunteers on completing their Troop Annual Financial Report, located in Volunteer Toolkit (VTK), and ensuring they are submitted no later than June 30 of each year.
- Support troop leaders in closing bank accounts according to GSU policies when a troop disbands, retires, or splits.

### **Service Unit & Troop Fundraiser/Money-Earning Proposals**

- Review group/troop's submitted money-earning proposals at least six (6) weeks before the project occurs.
- Utilize council's current GSU Volunteer Essentials Policies regarding money-earning requirements/guidelines to determine if projects meet all legal and financial qualifications.
- Inform group/troop if project is approved or denied. If denied, notify group/troop what requirements need to be adjusted, deleted and/or added.
- Submit approved proposals to council's Development Department ([development@gsutah.org](mailto:development@gsutah.org)) for final approval at least four (4) weeks before the project occurs.
- Inform group/troop if their proposal has been approved by the council. If denied, notify group/troop what council requirements need to be adjusted, deleted and/or added and resubmit accordingly.

### **Service Unit Annual Appeal – Council-Giving Campaign**

- Encourage troops to promote the Council-Giving Campaign with families/girls.
- Share with the SU volunteers the council and SU's giving campaign goals.
- Inform volunteers at monthly SU Volunteer meetings on the status of the campaign – how much the SU members/families have donated.

## **Benefits of Service**

### **Marketable Skills**

- Leadership
- Public Speaking - Facilitator
- Organization - Time Management
- Team Building
- Personnel & Conflict Management
- Delegation
- Volunteer Coordination
- Personal Integrity

### **Personal Enrichment**

- Foster a greater understanding of the beliefs of the Girl Scout Movement

- Participate in a national and international organization
- Network opportunities
- Involvement opportunities in local, county and state activities
- Mentoring experience
- Discover outlets for creative expression
- Fulfill a desire to be helpful and make a difference in the lives of girls and adults
- Promote equality, diversity, antiracism and be an adaptable individual committed to building a forward-looking volunteer network

### **Skill Learning Opportunities**

- Financial management skills
- Software programs (Excel)

### **Term of Appointment**

Appointed by Membership Support Specialist (MSS) and reappointment based on annual evaluation. This position is a minimum two-year commitment and is renewable for a second consecutive term, for a total of four (4) years of service. The Girl Scouts of Utah Council, in conjunction with the SU team, will perform an annual evaluation of each SU team member.

Once appointed to the position, volunteer will receive an email with instructions on how to access Looker.\* Volunteer will lose access to Looker once they leave the position.

Transition into or from SU positions takes place July to August. Whenever leaving this position, the volunteer needs to complete all outstanding position requirements and/or provide their MSS with details of all incomplete tasks/requirements and all current and past financial documents before departure SU debit card is given to the Service Unit Manager (SUM) or the MSS if the SUM position is vacant.

### **Council Support**

- Membership Support Specialist
- Volunteer Support Manager
- Training Specialist
- Finance Department
- Development Department
- Customer Care Department

### **Resources**

- Service Unit Guidebook
- Service Unit Planning Packet
  - Service Unit Budget
  - Expenses Guidelines
- Volunteer Essentials
- GSU Volunteer Policies
- Safety Activity Checkpoints

- gsLearn
- Looker\*

*\*Looker is an online program that Girl Scouts of Utah utilizes to obtain membership information. Girl Scouts of Utah is releasing restricted data to volunteers for their use in their Girl Scout volunteer capacity. Any unauthorized disclosure/distribution of such data, including but not limited to addresses, phone numbers, email, etc. for any reason other than Girl Scout business is prohibited. The violation of disclosing any such Girl Scout data may result in the termination of their volunteer service for Girl Scouts of Utah. Once a new volunteer has been appointed to a service unit position in our membership database (Salesforce), the next day they automatically have access to Looker. When a volunteer is removed from their position in Salesforce, their access is removed by the next day.*