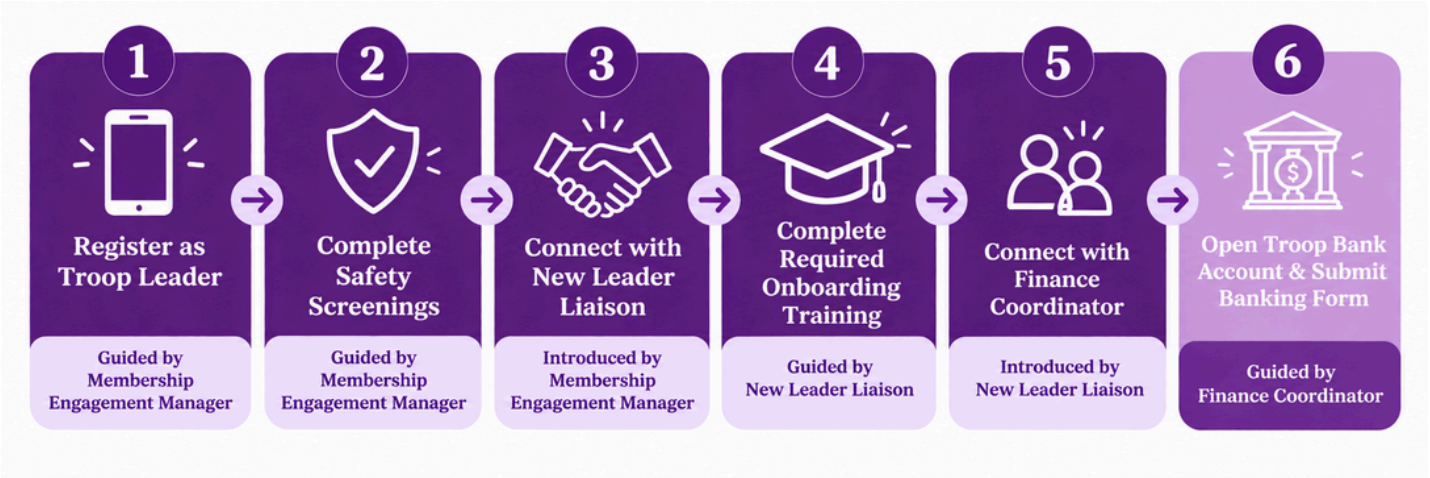
Finance Coordinator Support Guide

As a Service Unit Finance Coordinator, you play an important role in helping new Leaders get their troop finances set up and ready to go.

Guide them through the troop banking process, help them understand the steps to open a troop bank account or update existing account signers, and be a friendly point of contact they can turn to for questions and support along the way.

New Leader Onboarding Process

Here's an overview of the full onboarding process so you can see the big picture and where your role as the Finance Coordinator (FC) fits in!



Your Support

Your Membership Engagement Manager (MEM) is your staff partner throughout the process. They'll connect you with new Leaders, share helpful resources, and be available to answer questions or provide additional support along the way!

girl scouts of orange county

Welcoming and Providing Forms

Help troops get their bank account updated or opened

1. Register as Leader
2. Complete Safety Screenings
3. Connect with New Leader Liaison
4. Complete Required Trainings
5. **Connect wtih Finance Coordinator**
6. Open Bank Account & Submit Troop Banking Form

The New Leader Liaison will connect you with new Leaders once they've completed their required training. This is your opportunity to welcome them and guide them through the next steps to get their troop finances set up and ready to go.

What to Do

- **Introduce Yourself**
  Introduce yourself and let the Leaders know you'll help them through the troop banking process.

- **Gather Key Banking Details**
  Connect with the Leaders to collect the information needed to prepare their New Troop Authorization form, including:
  - Bank Name and Bank address
  - Full legal names of account signers
  - Address for bank statements
  - Name of signer getting removed (Existing Troops Only)
  - Account number (Existing Troops Only)

- **Prepare and Send Banking Documents**
  Use the information provided by the leader to complete the appropriate banking documents. Send the completed documents to the Leaders, along with the link to the Troop Banking Form.
  - New Troop Authorization Form for brand new troops
  - Chagne in Signers Form for existing troops

Resources

- Welcome and Details and Check-In Templates
- New Troop Authorization Template
- Change in Signers Template
- Troop Banking Form

Tips for Success

Know Signer Requirements
Account signers cannot be related by blood or marriage. At least 2 signers are required but 3 are recommended (2 Leaders, 1 Treasurer).

Do Not Send Blank Documents
Don't send the Leaders the blank Troop Authorization Form. Make sure to fill out and send to them.

Looker Quick Guide for Finance Coordinator

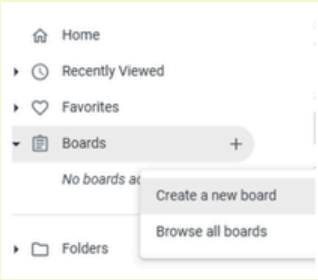
How to set up a Dashboard

1 Register as Leader | 2 Complete Safety Screenings | 3 Connect with New Leader Liaison | 4 Complete Required Trainings | **5 Connect wtih Finance Coordinator** | 6 Open Bank Account & Submit Troop Banking Form

Create a Dashbaord

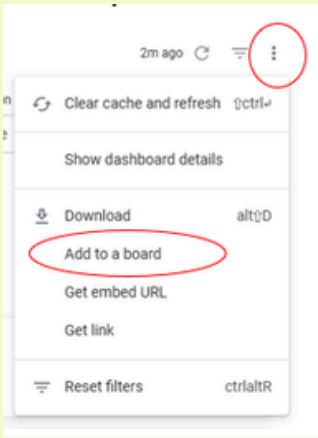
Create a dedicated dashboard in Looker to quickly access reports with your preferred filters already applied.

1. From the Looker homepage, click the + next to “Boards” and select “Create a new board”.



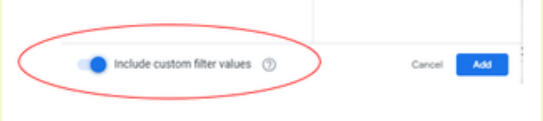
2. Name your Board. If you get an error message, add your SU number to the name!

3. Once your board is created, navigate to the report and adjust your filters.
See the next page for the filters!



4. Once updated, select the three dots icon in the upper righthand corner next to the “Update” icon and select “Add to a board”.

5. Select the board and toggle to include the custom filter values. Select “Add”.



See the full Looker Guide for more resources!

Looker Quick Guide for Finance Coordinator

How to run the gsLearn Summary report

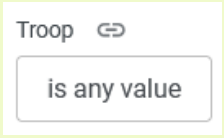
1. Register as Leader
2. Complete Safety Screenings
3. Connect with New Leader Liaison
4. **Complete Required Trainings**
5. Connect wtih Finance Coordinator
6. Open Bank Account & Submit Troop Banking Form

gsLearn Summary Filters

Apply the filters below to the gsLearn Summary report in Looker to see what required trainings new Leaders have completed.

Troop Number

Enter the troop number for the Leaders you want to review. You can also search by their email or Leader's name.

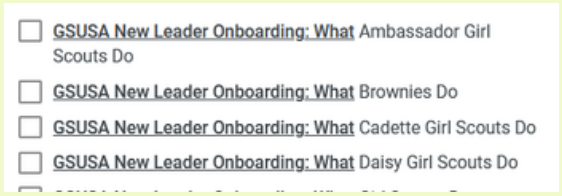


Course Title

Select the following courses*:

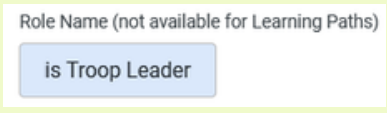
- GSUSA New Leader Onboarding: Funding the Fun: Managing Girl Scout Troop Finances
- 622 Managing Funds for Troop Leaders, Treasurers and Signers

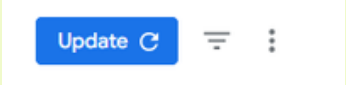
**Either are accepted for financial training. Existing Leaders most likley will have completed the Managing Funds course*



Role Name

Select "Troop Leader" and "Troop Treasurer"



Run Report

Select "Update" to run the report. Review the data under the Member List section. You can drag and rearrange the columns as needed.