

Finance Coordinator Support Guide

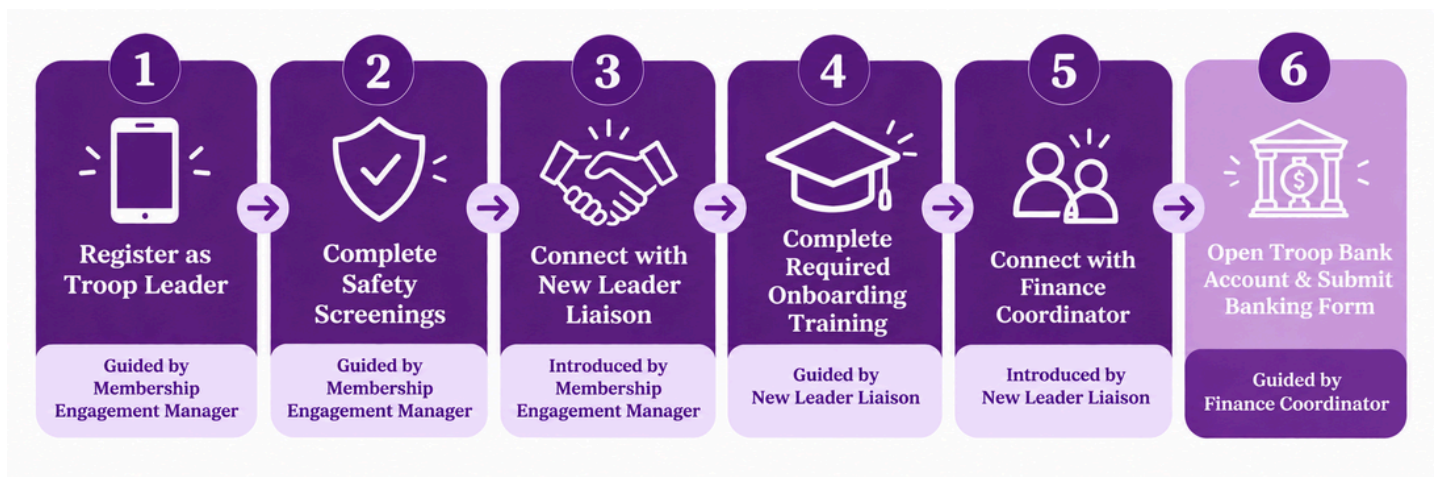


As a Service Unit Finance Coordinator, you play an important role in helping new Leaders get their troop finances set up and ready to go.

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!

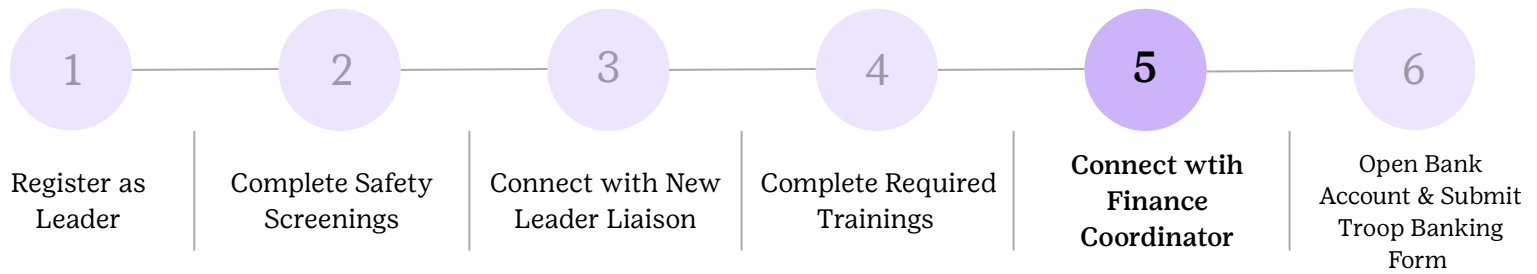


Your Support

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!

Get Connected to New Leaders

Help new troops open their troop bank account



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 leader 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 troop banking documents, including:

- Bank Name and address
- Full legal names of account signers
- Address for bank statements

- **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.

Resources

- [Welcome Email Template](#)
- [New Leader Hub](#)
- [Looker Guide](#)



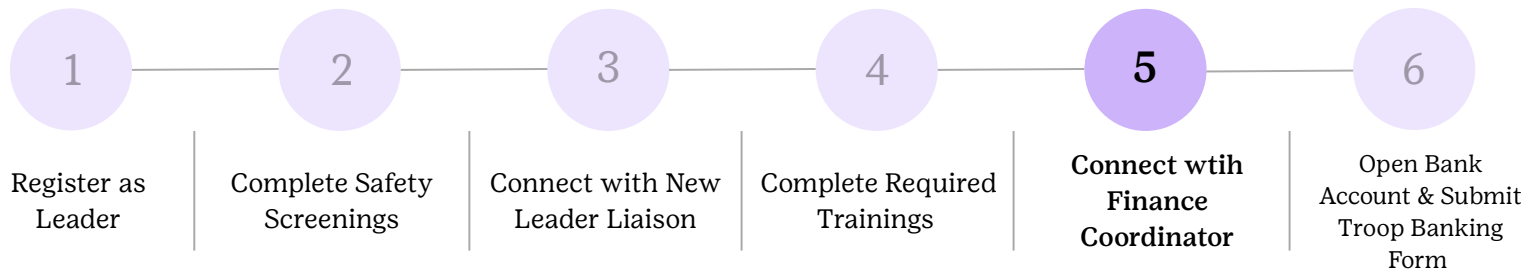
Avoid Girl Scout Jargon

New Leaders may not know all the acronyms or terms. Keep your language simple and don't assume they know!

Tips for Success

Providing Forms

Help existing troops update their troop bank account



You'll also help prepare the required banking documents for existing troops.

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
 - Change in Signers Form for existing troops

Resources

- [Welcome and Details and Check-In Templates](#)
- New Troop Authorization Template
- GSOC IRS Determination Letter
- [Troop Banking Form](#)



Tips for Success

Know Signer Requirements

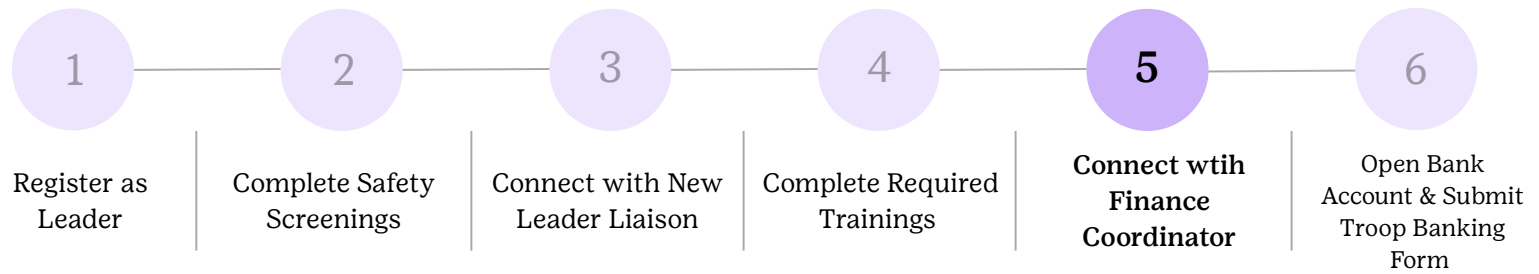
Account signers cannot be related by blood or marriage. At least 2 signers are required but 3 are recommended (2 Leaders, 1 Treasurer).

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

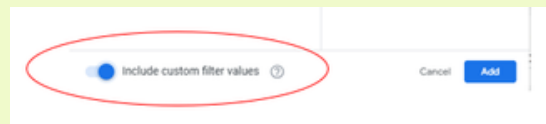
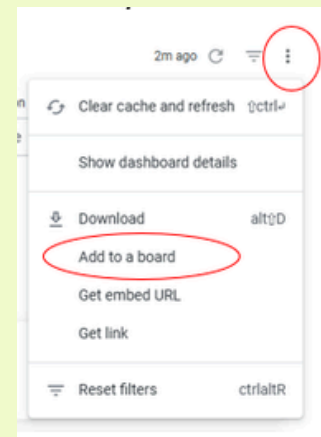
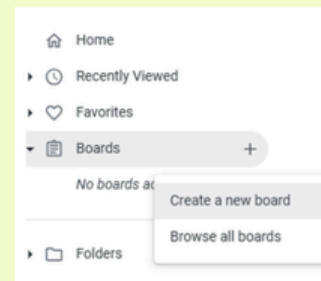
How to set up a Dashboard



Create a Dashboard

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

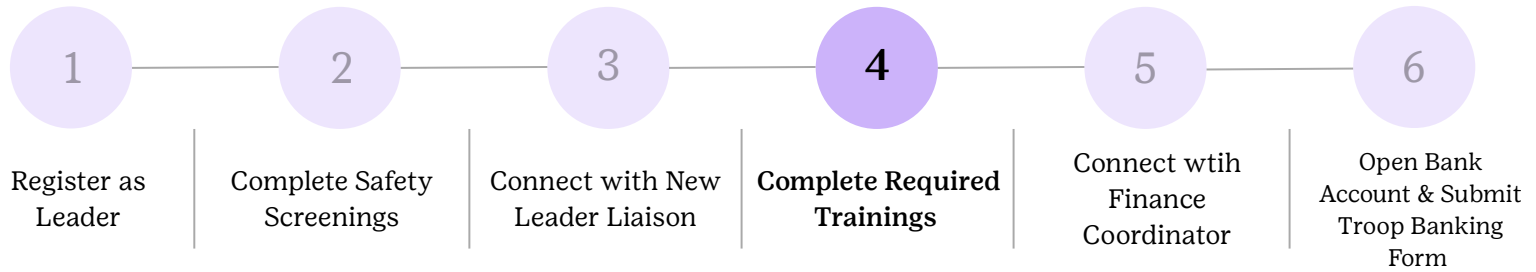
1. From the Looker homepage, click the + next to “Boards” and select “Create a new board”.
2. Name your Board. If you get an error message, add your SU number to the name!
3. Once your board is created, navigate to the report and adjust your filters.
See the next page for the filters!
4. Once updated, 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



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.

Troop 

is any value

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 likely will have completed the Managing Funds course*

☐ GSUSA New Leader Onboarding: What Ambassador Girl Scouts Do

☐ GSUSA New Leader Onboarding: What Brownies Do

☐ GSUSA New Leader Onboarding: What Cadette Girl Scouts Do

☐ GSUSA New Leader Onboarding: What Daisy Girl Scouts Do

Role Name

Select "Troop Leader" and "Troop Treasurer"

Role Name (not available for Learning Paths)

is Troop Leader

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.

Update   