

SERVICE UNIT TEAM

Treasurer Orientation Manual

Unlocking Leadership

Table of Contents

Service Unit Treasurer Position Description	2-3
Financial Tips for Success.....	4
Financial Guidelines.....	4
Suggested List of Files to be Maintained.....	5

Treasurer

Position Description

Pathway:

- Long-Term Direct Service Long-Term Indirect Service
 Short-Term Direct Service Short-Term Indirect Service

Time Commitment:

Duration 1 year(s) month(s) week(s) day(s)
For 5 hour(s) per year month week day

Summary:

The nature of this position requires the individual to provide indirect service by budgeting and managing all financial affairs of the Service Unit and to see that all forms are completed and submitted properly.

Reports to:

Membership Delivery Manager

Support:

The Service Unit Treasurer will receive full support, guidance and encouragement from the Service Unit Administrator, the Membership Delivery Manager and the Finance Department. She/he will have access to relevant learning opportunities and materials and will undergo the training/learning and orientation to Girl Scouting that will enhance her/his knowledge and confidence to work successfully with other adults and will enrich her/his Girl Scout experience.

Responsibilities/Tasks:

- Attend council sponsored training/learning
- Attend Service Unit meetings
- Plans budget with Service Unit based on Service Unit plan of work
- Handles all financial affairs of Service Unit (collecting money; depositing funds, paying bills, and balancing statements) as directed by Service Unit Administrator
- Maintains Service Unit copies of troop/group inventories, money-earning applications, troop and Service Unit financial reports; and troop bank account list with numbers, bank, and signatures
- Review troop financial reports
- Assist with troop audits as necessary.

Core Competencies-Required:

- Girl focus: Empower girls to lead activities, learn by doing, and cooperate with others on current issues that involve their interests and needs, while having fun

- Demonstrate dependability, honesty, and credibility
- Adaptability: Adjust, modify own behavior, and remain flexible and tolerant in response to changing situations and environments
- Oral communication: Express ideas and facts clearly and accurately
- Fostering diversity: Understand and embrace differences

Additional Competencies, Skills, or Requirements-Preferred:

- Be a registered adult member of GSUSA and have all Girl Scouts of Black Diamond volunteer paperwork on file
- Complete appropriate screening as outlined in the volunteer policies and procedures
- Be at least 18 years old Be a registered adult member of GSUSA and have a GSBDC volunteer application on file
- Accept the principles and beliefs of Girl Scouting and support local and national Girl Scout policies
- Ability to work with adults
- Ability to work independently and in an organized manner
- Ability to keep records effectively
- Willingness to keep informed of and attend meetings as required
- E-mail and internet know how

Required Training:

- Managing Troop Finances
- Service Unit Treasurer EOY Responsibilities
- Service Unit Treasurer Review completed and returned

Safety-Related Issues:

- See the volunteer policies procedures on our website under the Volunteer Resources section

Agreement

I have read the Volunteer Position Outline and agree to carry out my responsibilities as described. If for any reason I am unable to perform any of my responsibilities, the Council has the right to change my volunteer status. I will fulfill the outlined duties with no monetary compensation. I certify under penalty of perjury that I have not been convicted of any criminal offense. The Council will not knowingly accept voluntary services from a convicted sex offender. Volunteers are required to disclose to Council if they are living with a sex offender or have regular personal contact with a convicted sex offender, as well as the nature and the extent of such relationships or contacts. Volunteers who violate this procedure will be barred from any further participation in Girl Scout activities.

Name (print): _____ Email: _____

Phone: _____ Address: _____

Signature of Volunteer: _____ **Date:** _____

Service Unit Treasurer

Financial Tips for Success

1. Coordinate with the Service Unit Administrator to make sure all troops fill out troop information sheets with current bank information each year. Assist with troop audits as requested.
2. Begin to update continuing troops' information in August and September, gather new troops info as soon as they form. You could be involved in the establishment of troop bank accounts
3. Create a monthly report form for Service Unit income and expenses, which will follow the categories of the proposed budget and the end of the year report.
4. Review all paperwork, receipts, and statements immediately upon receipt so action can be taken sooner rather than later.
5. Request time at a leader meeting to speak to all leaders regarding your procedures for the Service Unit and troop financial matters.
6. Organize/form files by recipient: Local troops, Service Unit Administrator, Service Unit Treasurer, Membership Delivery Manager or GSBDC council representative.
7. Initiate an action file for items requiring attention or follow-up. Keep this file in a handy place where you will see it daily.

Service Unit Treasurer

Financial Guidelines

1. Service Units may establish accounts as needed and approved by the council
2. All Service Unit funds shall be deposited in a bank in the name of Girl Scouts of Black Diamond Council, Service Unit name.
3. Four signatures are required for a bank account. Signatures need to include the following: Service Unit Administrator, Service Unit Treasurer, another service unit team member and the Chief Finance and Business Officer. Each check issued must have 2 signatures.
4. An annual report of all monies received and distributed shall be prepared, and submitted to the Girls Scouts of Black Diamond Council Service Center no later than June 30 of each year (with information as of May 31.)
5. All Service Unit financial guidelines should be reviewed at the beginning of each membership year.
6. Service Units are not for profit generating entities. Occasionally, event income will be larger than event cost and a surplus will be created. This surplus may be used to benefit the girls as the Service Unit determines. Monies generated by income producing events shall only be used to support Girl Scouting on the Service Unit level.
7. Service Unit funds can augment the adult recognition funds provided by the Council, within reason, by decision of the Service Unit team. Service Unit funds can be used to support the delegate body. Service Unit funds can pay for special volunteer training programs at the local and troop level.

8. Service Unit funds should be used primarily for programs that benefit girls. Office supplies, postage, long distance calls, craft and leader training fees, etc. are considered support services for programs that benefit girls.
9. It is highly recommended that there be no transactions in cash. The checking account is the most accurate system for record keeping.

Service Unit Treasurer

List of Suggested Files to be maintained

Service Unit Management:

- Copy of the Service Unit Troop Treasurer Roster (Troop#, name, address, phone, e-mail, etc.)

Finances:

- Annual Service Unit Finance Report
- Copies of Troop's Finance forms

Day Camp Forms and Program Information

- Day camp budget

Service Unit Events:

- Budget sheets

Forms Requiring Approval:

- Application for Troop Money Earning

Resources

Webpages:

- Service Unit Team page—
- <http://www.bdgsc.org/en/for-volunteers/volunteer-resources/ServiceUnitTeam.html>

Questions about your position? Contact:

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