



finance coordinator

Updated August 2025

girl scouts 
heart of the south



The Service Unit Finance Coordinator (SUFC) provides general oversight and management of all service unit finances and is a knowledgeable and encouraging source of guidance, support and reassurance to troops regarding all relevant financial matters.

Our Mission:

Girl Scouting builds girls of courage, confidence, and character, who make the world a better place.

Qualities of a Great Girl Scout Leader



Honesty

You are a trusted representative of your service unit and of Girl Scouts. If you strive to make honest and ethical decisions, your team will too.



Ability to Delegate

Where there is trust, there is strength! The ability to delegate tasks to appropriate team members is one of the greatest skills you can have.



Communication

Be clear and be knowledgeable about what you want done or the information you wish to convey. If you can't explain it, they can't understand it.



Sense of Humor

Always try to find the smiles inside the struggles! If you strive to find the "punny" and positive side of any situation, your teammates will too!



Confidence

When setbacks occur, help assure everyone that everything is going to be OK. Be a source of encouragement and calm during life's little storms.



Commitment

Lead by example. If you expect your team to work hard and give of their time and talents, always do your best to do the same.



Positive Attitude

Help keep your team focused on the goals ahead by keeping a smile on your face and in your voice. Positive energy produces positive results!



Creativity

Problems don't always have clear solutions and sometimes the best ideas take a little time to find. Always try to think outside the box!



Ability to Inspire

Motivation is key to achieving your goals. Keep everyone's spirits high by appreciating hard work and recognizing team members' strengths.



Intuition

Use your best judgment. Trust your gut. When there is no roadmap telling you where to go or how to proceed, trust yourself and trust your team.



GSHS Service Unit Team Member

FINANCE COORDINATOR

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SERVICE UNIT FINANCE COORDINATOR POSITION DESCRIPTION

- Keep up-to- date financial records for the service unit and complete the service unit financial report by the assigned deadline
- Ensure that the service unit bank account is set up in accordance with GSHS financial policies
- Apply for and manage service unit tax exemption and assist troops with the tax exemption application process
- Provide up-to-date treasury reports at service unit meetings
- Facilitate budget planning based on service unit plan of work
- Promptly pay all invoices and reimbursements for service unit activities and events
- Collect monthly bank statements and receipts for the service unit
- Develop and execute plans for providing financial assistance in cases of need across service unit
- Provide guidance to troop leaders regarding troop finances and ensure bank accounts are properly set up and managed
- Assist troops with development of budget work plans
- Ensure proper closure of disbanded troop accounts and provide notification to council

Other SU Role Information Service Unit Finance Coordinator

Time Commitment - Approximately 2-4 hours per month

Term of Appointment - One Year (June 1 - May 31)

Accountability

- Accountable to the SU Operations Manager and assigned Membership Manager
- Position is renewable upon review and application

Thank you

for agreeing to serve as a Service Unit Finance Coordinator! Your volunteer role is vital to the stability of your service unit and ultimately the council. By following GSUSA and GSHS policies, implementing and overseeing the standards and procedures governing finances is quick and easy!

Service units and troops earn money primarily through the council's two product sales programs - Fall Product and Girl Scout Cookie Sales. Both of these programs are designed to help girls develop and practice the five essential financial skills. 100% of both of these sales stays right in our council and your community.



MONEY EARNING

- Service units may earn funds through council incentive programs during the Fall Product Program and Cookie Program, and through other incentive programs for membership growth, meeting early bird goals, etc.
- Additional money earning activities must follow guidelines by GSHS and GSUSA.
- All money earning activities require prior approval. Submit a [Money Earning Activity Request Form \(bit.ly/gshs_TroopMoneyEarning\)](https://bit.ly/gshs_TroopMoneyEarning) at least 30 days prior to your event.

In this guide you will find forms and guidelines to assist you in providing guidance regarding finances, budgets, bank accounts, tax exemption and required reporting to the council. For questions, contact your Membership Manager.

SERVICE UNIT FINANCIAL TRANSPARENCY

Keeping good financial records is a must! Keep receipts and track activity costs. Service units should share financial information with troop leaders and girls/families. When planning, make sure to keep the service unit budget in mind and to save money to help fund next year's activities, too.

BUDGETS

Service Units and Troops should develop a budget that reflects their goals and plan of work.

Creating a Service Unit Budget:

Service unit funds are intended to benefit all girls in the service unit and should be used to further the Girl Scout mission. The team leads should collaborate in the preparation of an annual budget in July when they are preparing for the upcoming year. The annual budget should be used to guide the service unit's activities, but the budget may evolve over the course of the program year as priorities and opportunities shift. Team leads should collaborate throughout the year to ensure that necessary funds are available to meet the service unit's goals and may adjust the budget if needed. Some planning questions to consider:

- What types of activities will be planned for troops in our area?
- What types of activities will be planned for volunteers in our area?
- What are the costs associated with these activities?
- How will the service unit fund these activities?

Service Unit Budget Should Include:

- Family Events
- Court of Awards
- Camporee
- Recruitment Events
- Program Activities
- Financial Assistance in cases of need
- Service Unit Supplies
- Banking Fees
- Volunteer Training

Service Unit Budget Planning Guidelines

Service unit funds can be instrumental in helping a service unit experience membership growth and retention, offer exciting programming opportunities, and introduce Girl Scouting to the broader community. But this can only happen if the funds are properly tracked and used for the legitimate purposes of supporting leadership development and training of its adult volunteers, providing support to troops and girls in need, providing service to the community, and

facilitating fun events and activities that engage girls, their families, and community members.

In the Appendix you will find several tools to help you build financially sound service unit budgets.

These tools include:

- The **Service Unit Budget Worksheet** (see Appendix) to help account for all funds that build your service unit budget.
- The **Program/Event Worksheet** (see Appendix) to help plan for and anticipate event income and expenditures. This worksheet will also help determine the purpose and benefits of hosting those events.

Utilize the **Service Unit Budget Worksheet** (s a support to the **Financial Report** - filed through the VTK - and to account for all income and expenses incurred by the service team to implement service unit activities, programs and events.

Budget Tips

The treasurer, service unit team, and volunteer support staff work together to develop an annual budget to support the team's Plan for Success. A possible suggested breakdown of a yearly budget for a Service Unit is below:

- 1. Program services - 30%** This includes all expenses for providing programming for girls such as service unit events and other activities.
- 2. Volunteer Appreciation - 10%**
- 3. Assistance to individuals - 15%** This includes requested support for individual girls, such as money for a Destinations trip. Whenever possible, service teams are encouraged to help with the cost of these requests.
- 4. Resources and Administration Costs - 10%** Appropriate uses for money would include expenses such as providing resources for new troops (Journey book), maintaining service unit libraries, and providing assistance to existing troops as needed. This includes expenses for administrative costs including photocopies, paper, postage, and meeting place rental fees.
- 5. Start-up money for new troops - 10%** This is for the one-time grant for a new troop. Troops are not expected to reimburse the service unit.
- 6. Recruitment - 25%** This is all expenses that go along with membership growth for girls and volunteers.

BANK ACCOUNTS

- Each service unit should have a checking account in an accredited financial institution. It is suggested that you contact your personal bank to see what they will offer in regard to "free" checking. A personal relationship with a banker sometimes can be beneficial to achieve this. Your Membership Manager can provide a letter from the council confirming the EIN# (see below). This account cannot be shared with a troop or other group.
- Two unrelated, registered, and approved volunteers must be on the service unit bank account.
- Opening a new bank account requires a bank authorization letter from Girl Scouts Heart of the South. Contact your Membership Manager.
- Once the service unit bank account is open, an **ACH Authorization Form** must be submitted. (bit.ly/gshs_ACHAuthorizationForm)

Use the Council EIN# (Employer Identification Number) **62-0502197**
to open the bank account in the name of the council.

All check signers should be registered members of Girl Scouts of the USA. Only one signature is required on each check, however two or more unrelated adults should be authorized to sign on the account. One person should be responsible for the check book or Debit Card. The other signer should be responsible for doing monthly reconciliation of the bank statement. Because of the Patriot Act, banks need to know their customers. Consequently volunteers must provide their social security numbers to be signers on accounts even though the bank will use the Council EIN number to open the account.

Debit cards may be used instead of checks. Remember purchases must be entered into a register for record keeping and keep receipts.

Statements should be sent to the volunteer's home and not the council. The person who ordinarily signs the check or handles the Debit card should not be the person who also reconciles the bank statement. When making purchases, always get a receipt; keep copies of deposit tickets for financial reporting and bank reconciliation.

DON'T write checks out for "Cash" or to yourself, and endorse by you; this is a big "red flag" when the accounts are monitored.

DON'T round up your check or write a check for more than the amount of the purchases. This is also a "red flag."

DON'T allow parents to be late with payments for the product programs. Remember, if they give you a personal check, the council will not accept.

DON'T use your own personal money to pay for service unit activities. All expenses should be paid out of service unit funds.

DISBANDED TROOP/SERVICE UNIT

A disbanded troop is a troop that is no longer meeting or the troop has not registered for at least 3 months from the expiration date of the last registration. Funds and equipment of disbanded troops/service units are the property of Girl Scouts Heart of the South and will be returned to the keeping of the council. If reorganization of the troop/service unit does not take place within 12 months, the resources will be used by the council in the interest of Girl Scouting. A final **Financial Report** is to be filed through the VTK along with a **Disbanded Troop/Group Report Form** upon disbanding troop/service unit. Refer to the **Disbanding Troop Process** found in the Appendix.

SALES TAX EXEMPTION

In Tennessee, all materials and food purchased by a Girl Scout service unit are exempt from sales tax, *if* a Tennessee Sales Tax Exemption Certificate has been requested *by the service unit* from the State of Tennessee (see Appendix for Application). Purchases must be paid with either a check or debit card with the council name (Girl Scouts Heart of the South) and service unit name listed on it. Businesses are not allowed to accept cash when using a sales tax exemption certificate.

After the application is received by the state, it takes approximately three weeks to receive your exemption form. You may also visit the local Tennessee State Dept. of Revenue office at 3150 Appling Road, Memphis, TN to handle this in person and receive your form immediately.

Originals of this form should be kept by the service unit and only copies used to give to businesses. A copy should be submitted to the Council Shop to be kept on file so purchases made there can also be tax exempt. The State of Tennessee routinely reviews and issues new exemption forms which must be used for tax exemption.



Mississippi troops may apply to the State of Tennessee for sales tax exemption for use in Tennessee only.

In Mississippi, Girl Scout troops/service units/associations are exempt from paying sales tax per House Bill 369. Copies of this form are available from each Girl Scouts Heart of the South council office and may be used by producing a copy of the letter from the State Tax Commission and using a troop check that has the council name printed on them (see Appendix for copy of MS State Tax Commission letter).

In Arkansas, Girl Scout troop/service units/associations are exempt from paying sales tax. No state form is required.

ACCEPTANCE OF DONATIONS

Service units must obtain approval from the council prior to asking or accepting cash, in-kind or real property donations that exceed \$250 per gift. This can be done by filling in a **Gift Acceptance Form** (bit.ly/gshs_GiftAcceptance - see Appendix for form). All donations must be reported on the appropriate year-end financial report.

DEBT AND COLLECTIONS

Girl Scouts Heart of South is firm in its efforts to collect any and all debts owed to the council.

These debts may be caused by returned checks, money owed for product sales (troop and parents) or funds misappropriated by those adults who are responsible for troop/service unit/association funds. All efforts to collect will be taken including but not limited to collection agency, garnishment and prosecution. Fees for collection will be charged to those owing.

The council makes every effort to work with those who owe the council on an individual basis.

FINANCIAL REPORTING

Each troop/group is required to submit a completed **Financial Report** yearly through the VTK. Income, expenses, and three months of bank statements are required to complete the finance report. This form ensures that bank accounts have been set up properly with the correct information and two unrelated signatories, show expenditure patterns, show any existing debt and help alert the council to any misappropriation of funds or possible “red flags” requiring attention. This report can be found on the VTK and is due by July 31.

All receipts, bank statements, reports from Fall Product and Cookie Sales and money earning activities should be kept together to allow for quick and easy completion of this report.



THANK YOU for your continued dedication to
Girl Scouts, our mission, and to Girl Scouts Heart of the South!
We appreciate you!



GSHS Service Unit Team Member

FINANCE COORDINATOR

APPENDIX

GSHS Financial Forms

Link to Money Earning Activity Request Form

https://bit.ly/gshs_TroopMoneyEarning



Service Unit Budget Worksheet

	Proposed Budget	Actual	+/-
Carry-over Balance (from prior year)			
INCOME			
Early Renewal Bonus			
Interest Income			
Disbanded Troops			
Event Registration			
Service Unit Camp Registration			
Other:			
Other:			
Other:			
Total Income			
EXPENSES <i>Suggested expenses include: start-up funds to support new troops; resources the service unit can check out to troops such as Journeys and grade-level handbooks; early renewal incentives; adult recognitions; adult volunteer end-of-year event; new troop support; assistance to girls participating in destinations, camp, Take Action Projects, and Highest Awards.</i>			
Administration			
Engagement + Recruitment			
Programs/Events - Service Unit Camp			
Programs/Events - World Thinking Day			
Programs/Events -			
Service Unit Meeting Expenses			
Other:			
Other:			
Other:			
Other:			
Other:			
Other:			
Other:			
Other:			
Total Expenses			

This form is to be completed **annually** by all troops and service units that have – or are establishing – a troop/service unit bank account.

- Submit this form within two weeks of opening a new bank account.
- If the account location or signatories change, a new form must be submitted within two weeks of the change.
- Any troop/service unit with \$100 or more in its treasury must deposit those funds into a troop/service unit account at an accredited financial institution.

Troop(s) _____ of SU# _____ Service Unit _____

**List ALL troops associated with this account.*

Account Type: ☐ Service Unit Bank Account ☐ Troop Bank Account

Type of bank account: ☐ Checking ☐ Savings ☐ Other _____

Bank Name: _____

Bank Account # _____ Bank Routing # _____

ACH Agreement Terms

The troop/service unit named above acknowledges and agrees to the following:

- Maintain an active GSHS troop/service unit bank account.
- Deposit funds **frequently** into the troop account.
 - Deposits will cover amounts due to GSHS, calculated as total sales less troop proceeds and any documented shortage submitted by deadlines outlined in the Product Program guides.
- Authorize GSHS to:
 - Deposit and/or sweep funds from the troop/service unit bank account in accordance with established timelines and/or with prior consent.
 - Make additional withdrawals as necessary to recover any outstanding balances until paid in full.
 - Repeat deposits/sweeps that fail for any reason or a balance remains unpaid.
- Communicate and report any shortages of required funds through the [ACH Shortage Form](#) by deadlines set in the Product Program guides.
- Accept responsibility for any non-sufficient funds (NSF) fees resulting from a rejected bank sweep.
- Understand that notifications of upcoming withdrawals will be provided in advance when feasible, but GSHS may withdraw funds without additional consent to satisfy balances due.

List all signees with the ability to sign checks or withdraw funds from this account: Spender: _____

Record Keeper: _____ Other: _____

ATTACH COPY OF CHECK HERE

Must include bank name, account and routing information.

IF NO CHECKS:

Attach a letter from the bank that verifies both routing and account numbers.

I certify that I am a signer on the account designated and am entitled to provide the above information.

Signature: _____

Troop #(s): _____

Print Name: _____

Service Unit: _____

Street Address: _____

Home Phone: () _____

City: _____ State: _____ Zip: _____

Work Phone: () _____

Email Address: _____

Cell Phone: () _____

The signatures listed above also serve as authorization for the bank to release account information and the balances of this account to Girl Scouts Heart of the South. For additional support in establishing a troop/SU bank account and/or financial management support, please contact us at 800-624-4185 or info@girlscoutshs.org.

Submit form to info@girlscoutshs.org or to your local service center.

Gift Acceptance Form

**Part 1: To be completed by Girl Scouts Heart of the South volunteer or Girl Scout working on their Gold Award.
Donor to complete Part 2 OR Part 3 AND Part 4. GSHS Federal Tax ID number is 62-0502197.**

Service Unit _____ Troop/Group# _____ Is this for a Gold Award Project? _____
Name _____ Email _____
Phone: Home _____ Work _____ Cell _____
Address _____
City _____ State _____ Zip _____

Part 2: Monetary Gifts

For donations in the amount of \$250 or more and any donation of any amount requiring a tax-deductible statement from Girl Scouts Heart of the South, please complete this portion of the form and send to Girl Scouts Heart of the South. Attach any documentation pertaining to the gift such as letters, applications, or checks.

Gift Amount: \$ _____ Gift Date: _____
Purpose of Gift: _____

Part 3: In-kind Gifts

For donations of materials, supplies or services, or any donation of in-kind gifts requiring a tax-deductible statement from Girl Scouts Heart of the South, please complete this portion of the form and send to Girl Scouts Heart of the South. Attach any documentation pertaining to the goods or services – letter, invoice, or shipping receipt.

Description of Item(s): _____

Fair Market Value of Item(s) Donated: \$ _____

Check one:

- ◆ Item(s) has been delivered or picked up (Date) _____
- ◆ Item(s) will be available on (Date) _____ (Location) _____

Part 4: Donor Information

Donor(s) Name: _____

Business Name (if applicable): _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

Email: _____ Website (if applicable): _____

Donor Signature: _____

Person Securing Gift: _____
Girl Scout Member/Staff Person Signature Phone E-mail