Service Unit Treasurer Checklist

Suggested Timeline

☐ **Role Onboarding**

- Understand the Service Unit Treasurer's role and fiduciary commitment and responsibilities
- Complete and sign the Service Unit Treasurer Position Description
- Connect with Council's Membership Manager for your Service Unit and Council's Membership Coordinator, introduce yourself and understand each of their roles and responsibilities
- Become one of the two signers on the Service Unit Bank Account by completing the ***Opening a Bank Account/Making Changes to an Existing Troop/Service Unit Account*** form

☐ **August: Service Unit Budget**

- Meet with the Service Unit Team to plan the budget for the new year

☐ **September-October: Assist Troop Start-Up**

- Mentor new leaders and troops about the opening of a new troop account or making changes to an existing troop account, and assist them by providing the ***Opening a Bank Account/Making Changes to an Existing Troop/Service Unit Account*** form
- Work closely with the Council's Membership Coordinator on the status of the new/changed troop accounts

☐ **Nov-Jan: Hold a financial enrichment training for new and existing troops**

- Discuss how to properly manage troop funds and inform leaders on what to prepare for the Annual Financial Report
- Discuss the management of troop funds earned with the Cookie Product Program
- Explain the process of troop disbanding or troop retiring (12th-grade troops bridging to adulthood) to troops who are planning to disband or retire in May. Provide the ***Troop Disband Notice*** form if needed, and connect troops with Council's Membership Coordinator

☐ **April: Coach troops**

- Coach troops in completing the Annual Finance Report, ensure that troops understand the reason for the deadline in receiving the financial information by Council and that the information they plan to submit is complete

☐ **May-June: Facilitate reporting for the Service Unit and assist troops**

- Complete the Service Unit Annual Finance Report and submit the required information by the due date
- Ensure each troop in the Service Unit submits the troop's annual financial report and supporting documentation by the due date

☐ **June-July: Annual Financial Troop Reports – follow up**

- Work closely with Council's Membership Coordinator to identify the troops who have not completed the Annual Financial Report or who are missing any supporting documentation
- Check in with the troops who did not submit the Annual Financial Report and assist in the completion and submission of the report

Throughout the year: Manage Service Unit Money

- Collaborate with the Service Unit team to develop and maintain a budget throughout the year
- Provide monthly Service Unit financial updates to the Service Unit team and a financial summary to the entire Service Unit at Service Unit meetings
- Ensure that necessary financial reports are received from volunteers and recorded after the completion of a Service Unit event

Thank you for volunteering!