

SERVICE UNIT TEAM

Membership Advisor Orientation Manual

Unlocking Leadership

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Membership Advisor Responsibilities

The Service Unit Membership Advisor is the official membership record keeper for the Service Unit. In this role, you will assist leaders, your Service Unit Administrator, the Membership Delivery Manager, and Girl Scouts of Black Diamond Council in tracking Girl and Adult Membership within your Service Unit.

We hope you know just how important your role is! Every inaccurate record directly impacts a girl who is waiting to begin her Girl Scout experience. For example, inaccuracies may prevent a girl from being able to register for events or from being entered into our product sales systems. Together, we can prevent these inaccuracies, and your assistance in this mission is invaluable.

While it is important that you understand the basics of how to register new and renewing girls, adults, and troops, please know that Salesforce is a complex registration system. Sometimes things that seem straightforward don't feel that way during registration. You should never hesitate to contact our Customer Care Team at (304)345-7722 or CustomerCare@BDGSC.org. We are here to assist you in any way possible and truly enjoy working with our Membership Advisors!

As a Service Unit Membership Advisor, you will:

- Provide membership registration and renewal support to troop leaders as needed.
- Monitor troop rosters to ensure all participating girls and adults are registered members. GSUSA and Council insurance policies cover registered members, so it is very important that all participating girls and adults in your Service Unit are registered. For insurance purposes, a girl or adult is covered once the signed membership form is handed in to the Membership Delivery Manager. This same policy is applied when checking the registration status of girls and adults prior to their participation in the product sales.
- Monitor troop rosters to ensure all information on file for each participating girl and adult is accurate in terms of each girl's troop assignment and each volunteer's role assignment. Please contact Customer Care at (304)345-7722 or CustomerCare@BDGSC.org for assistance with transferring a girl or adult to a different troop or volunteer role.

Membership Advisor Position Description

Pathway

All

- | | |
|--|--|
| <input type="checkbox"/> Long-Term Direct Service | <input checked="" type="checkbox"/> Long-Term Indirect Service |
| <input type="checkbox"/> Short-Term Direct Service | <input type="checkbox"/> Short-Term Indirect Service |

Time Commitment

Duration 1 year(s) month(s) week(s) day(s)
For 2-3 hour(s) per year month week day

Summary

The Service Unit Membership Advisor is responsible for assisting troops with registration and renewal, as well as ensuring that every girl who expresses interest in joining Girl Scouts is given the opportunity to receive the Girl Scout Leadership Experience. This position also works with troop leaders, the Service Unit Team, and council staff to compare local membership records with council records and rectify any discrepancies.

Place of Service

Service Unit

Reports To

Membership Delivery Manager

Responsibilities/Tasks

- Agree to be guided in all actions by the Girl Scout Mission, Promise and Law, and to comply with the policies of GSBDC and GSUSA.
- Ability and willingness to contribute to a supportive Service Unit environment and conscientious effort toward meeting the responsibilities of the position are required.
- Work with the Service Unit and Regional Membership and Program Staff to provide options available for individual Girl Scout (iGirl) participation.
- Communicate with the Service Unit Team and Membership Delivery Staff to receive support and assistance in placing girls.
- Working with the Membership Delivery Manager, follow up with lapsed members for re-engagement.
- Maintain GSBDC confidentiality standards.
- Learn how to use the data management system, Looker.
- Provide support to leaders unable to use online troop management.
- Verify monthly that all regional data inside Looker is accurate and notify Customer Care of changes or issues by contacting CustomerCare@BDGSC.org.
- Assist with coordination of spring registration process including the extended year option.

- Ensures that ALL troops are renewed by September 30 each year.

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.
- Personal Integrity: Demonstrate dependability, honesty, and credibility.
- Adaptability: Adjust and/or modify own behavior to 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.

Skills

- Technology access and ability to utilize email and internet.
- Possess high level of administrative and organization skills.
- Have a well-rounded knowledge of the Girl Scout Leadership Experience, Girl Scout Mission, Promise, and Law.
- Exercise a high level of integrity, keeping confidential information secure.
- Serve as a positive example for girls by modeling desired attributes and behaviors such as reliability, respect for others, inclusiveness, and a positive attitude.
- Remain flexible and tolerant in changing situations and surroundings.
- Value, develop, and celebrate group and individual diversity.
- Have experience in working in partnership with adults.
- Remove barriers to participation.
- Listen to others and include their ideas.
- Express ideas and facts clearly and accurately.
- Ability to communicate effectively.
- Encourage girl-adult partnerships that lead to opportunities for girl-leadership growth.

Support

The Membership Advisor is supported by and accountable to the Service Unit Team and Membership Delivery Manager. This position will be provided with email updates as needed; access to our data management system, Looker; quarterly volunteer networking webinars; and in-person meetings at the local level to ensure capability of fulfilling the responsibilities of the position.

Training and Development

- Membership Advisor Orientation Manual
- Membership Advisor Orientation Manual Review
- GSUSA training on using the data management system, Looker

Requirements

- Become a registered member of GSUSA
- Approved volunteer background check

- Signed Volunteer Position Agreement
- Be at least 21 years of age
- Accept the principles and beliefs of Girl Scouting and support local and national Girl Scout policies, practices, and procedures
- Complete required training for position
- Remain in close communication with the Membership Delivery Manager on a regular basis
- Ability to work with adults
- Ability to work independently and in an organized manner
- Willingness to keep informed and attend meetings as required
- Internet and email access and knowledge of use

Safety-Related Matters

See the Policies for Girl Scout Volunteers 2020-2021 Handbook on our website under the Volunteer Resources page.

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): _____

Phone: _____ Email: _____

Address: _____

Signature of Volunteer: _____

Date: _____

Program Basics

Girl Scout Program Grade Levels

Daisy Grades K-1

Brownie Grades 2-3

Junior Grades 4-5

Cadette Grades 6-8

Senior Grades 9-10

Ambassador Grades 11-12

- Girl Scout program grade level is determined by the current membership year, beginning October 1.
- Girl Scout membership standards are designed to allow for flexibility when placing a girl in a Girl Scout program grade level.
- Troops often include girls from more than one school grade and reflect the diversity of socio-economic, racial, cultural, and religious groups in the community.
- The needs of the girls must be the primary consideration when deciding which program grade level she should register into. Her maturity, interests, and peer-identification should determine whether she would be more comfortable grouped with older or younger girls. Parents/guardians are consulted before a decision about placement is made.
- Girls with disabilities that receive special education services may be enrolled as Girl Scouts until the age of 21. Girls should be placed with peers of their same chronological age and wear the uniform of that grade level.

Ways to Participate.

Not all girls elect to participate in traditional troops due to personal preferences or scheduling challenges. These girls can still participate in one of the many ways that Girl Scouts has to offer (other than troop) including: virtual, iGirls, series, events, camp, and travel.

All of these are ways that girls participate in Girl Scouting. Girls can choose any one, all, or some of these pathways within a single year; however, different pathways may be geared specifically to different grade levels.

- Traditional Troops - Girls participate in a series of in-person programming with the same group of girls over the course of an academic year.
- Virtual Troops - Girls participate in interactive, high-quality program activities in a safe, secure, online environment supplemented by live events.
- Individual Membership (iGirls) – This is an option for girls and adults, new or renewing, who wish to be member of GSUSA when:
 - No Troop placement is available.

- Troop placement is available, but the girl/adult is unable to participate in a traditional or virtual Troop or Series.
- The girl/adult does not wish to participate as part of a Troop or Series.
- Series - Girls participate in a short term series of programming relating to a specific theme or purpose with the same group of girls.
- Events - Girls participate in events.
- Camp - Girls participate in day or resident camps with a focus on out-of-doors and/or environmental education.
- Travel - Girls plan, earn money, prepare, and participate in regional, national, and international trips.

Membership Requirements

Membership as a Girl Scout is granted to any girl who: has made the Girl Scout Promise and accepted the Girl Scout Law and has paid annual membership dues*.

Membership as a Girl Scout adult is granted to any person who: accepts the principles and beliefs in the Girl Scout Promise and the Girl Scout Law and has paid annual or lifetime membership dues*.

**Membership dues are not refundable or transferable to another person.*

**Limited Financial Assistance is available from Girl Scouts of Black Diamond Council for any girl and adults in key leadership positions in order to pay Girl Scouts of the USA's annual membership dues. Contact your Membership Delivery Manager for further information. Troop leaders cannot apply for financial assistance on behalf of a girl. Only parents can apply for financial assistance.*

New or Renewing

An individual is considered **new** the first time they register with GSUSA, **NOT** the first time they register with a troop. Any adult returning to the Girl Scout Movement after having registered as a girl (or adult) is **renewing**, and her/his registration should be marked accordingly.

Troop numbers not used in any membership year are returned to the association's bank of numbers and **can only be reactivated** by the Customer Care team. To obtain a number, contact the Membership Delivery Manager for your area.

Girl to Adult Safety Ratios

Remember that there should always be adequate coverage for any Troop meeting. Adult Coverage required for Troops:

	Group Meetings		Events, Travel, and Camping	
	<i>Two</i> unrelated adults, one of whom is female, for this number of girls:	Plus <i>one</i> additional adult for each additional number of this many girls:	<i>Two</i> unrelated adults, one of whom is female, for this number of girls:	Plus <i>one</i> additional adult for each additional number of this many girls:
Girl Scout Daisies (grades K–1)	12	1–6	6	1–4
Girl Scout Brownies (grades 2–3)	20	1–8	12	1–6
Girl Scout Juniors (grades 4–5)	25	1–10	16	1–8
Girl Scout Cadettes (grades 6–8)	25	1–12	20	1–10
Girl Scout Seniors (grades 9–10)	30	1–15	24	1–12
Girl Scout Ambassadors (grades 11–12)	30	1–15	24	1–12

Membership Basics

Membership Year & Registration Periods

There are four main registration periods throughout the year. The GSUSA membership year runs October 1 – September 30. Girls and adults may register for a membership at any time during the year, as well as during the Spring Renewal season in advance of the next membership year.

1. The first registration period for a membership year is Spring Renewal which typically runs from early April through June. Check each year for specific campaign dates. Any registrations completed online or received in the Charleston Girl Scout & Volunteer Resource Center by the deadline are considered Spring Renewal for reporting and incentive purposes. (This was formerly known as “Spring Registration” or “Early Bird”.)
2. The second registration period is On-Time Renewal. On-Time Renewal begins when Spring Renewal ends. It is called On-Time, because troop leaders will need to have their new and returning members’ registrations completed by October.
3. The third registration period is the extended year/Daisy launch. This period begins on April 1 and ends July 31. During this period, girls can register for both the current membership year and the upcoming membership year.
4. The rest of the year comprises the other registration period. Registrations can be submitted all throughout the membership year.

Membership Fee

Annual Girl and Adult Memberships are \$25 each.

The membership dues allow girls to participate in any of the pathways, any council or Service Unit events, both the Fall Product Sale and Cookie Program, and any other Girl Scout related activity. Also, any registered girls and adults are covered under the GSUSA secondary insurance.

Extended Year Membership is \$35.

Beginning in the 2018 membership year, GSUSA began offering an opportunity for new girls and adults to register for both the remainder of the current membership year as well as the upcoming year for a discounted rate. Check each year for specific campaign dates. All new girls and adults, including Pre-K girls, can purchase a current-year membership on April 1 for \$10. In conjunction with this, they will also purchase a next-year membership for the normal fee of \$25, for a total of \$35. All new girls and adults are eligible for this promotion. Returning members and lapsed members are not eligible.

Lifetime Membership is \$200 - \$400.

We offer two different lifetime membership products: a traditional lifetime membership at \$400, or a Alum lifetime membership for those under the age of 30 and for currently registered volunteers with ten or more years of service for \$200. Adults may purchase a lifetime membership through the normal registration process by going to our website

(www.BDGSC.org) and clicking “Join”. During the checkout process, they will be asked to select the type of membership they want and can select lifetime or lifetime alum on this screen.

Methods of Membership Registration

Online New Member Registration – Individuals

Parents/guardians may purchase a new membership online for themselves, their daughter, or another family member.

Online New Member Registration – Troops

Troop leaders can invite new members to their troop online.

Online Renewal - Individuals

Individuals who are currently registered and want to renew for the upcoming year may do so online, through their myGS Account. This also applies to individuals who have not renewed for the current year but were registered members in the previous year. Renewal is available throughout the year.

Online Renewal - Troops

Online renewal for troops is available beginning in April each year. Online renewal is the preferred method of renewal. Troop leaders and assistant leaders are the only people who can complete an online troop renewal, and it is only available for girls and adults who were registered with the troop in the current year. Any request for financial assistance must be completed by the member requesting the assistance (or the parent/guardian of the member). Leaders cannot request financial assistance for their members. Leaders will also need a debit or credit card to renew members online. Training and written instructions for online renewal will be provided prior to Spring Renewal to all leaders and Membership Advisors. Troop leaders cannot renew girls online after Oct. 1.

Lifetime Member Registration

Adults wishing to purchase a lifetime membership may do so online at any time.

Paper Registrations

All members, both individuals and troops, can register via paper application. For paper applications, please contact Customer Care at (304)345-7722 or CustomerCare@BDGSC.org. Please note that online registration is the preferred method, as manually entering paper applications is very labor and time intensive. Paper forms should only be used when the Membership Advisor, Leader, Parent, and Service Unit Administrator do not have internet access.

Financial Assistance

Any request for financial assistance must be completed by the person requesting financial assistance (or the parent/guardian of the person). Leaders cannot request financial assistance for their members. Individuals are able to select financial assistance as an option at the time of checkout online. Paper registrations requesting financial assistance must be accompanied by a completed financial assistance request form.

Financial assistance is only approved for adults in the following volunteer positions:

- Troop Leader
- Assistant Leader
- Troop Treasurer
- Troop Cookie Manager
- Troop Fall Sales Manager
- Troop Chaperone
- Troop Driver
- Service Unit Administrator
- Service Unit Treasurer
- Service Unit Cookie Chair
- Service Unit Fall Product Chair
- Service Unit Recruiter
- Service Unit Membership Advisor
- Service Unit Event Pathway Consultant
- Service Unit Communications Liaison
- Service Unit Fund Development Liaison

Online Registration Basics for Troop and Assistant Leaders

New Membership

Leaders cannot register new girls directly to their troop unless they are a member of her/his household, but they can send friends an email invitation to join their troop from the “My Troops” tab.

1. Log in to your myGS Account.
2. Select the specific troop number from the menu under “My Troops”.
3. Click “Invite friends to join your troop.”
4. Enter at least one email address and click “Submit Request.” A confirmation message will appear as, “Success! Your invites have been sent.”
5. The referral will receive an email with the troop leader’s name and contact information.
6. Included in the email is a link to the troop in the Participation Catalog. From here, the referral can add girls or adults to the cart, and then check out. If the referral does not have an account, she/he will need to create one to complete the registration.

Parents/guardians also have the ability to invite friends to join their troop, if there are openings. (If an Invitation Email is sent to a friend, and there are no vacancies in the friend’s troop, her parent/guardian will be redirected to the Participation Catalog where the friend can choose a different troop.)

Renewal Membership

Beginning April 1, the system will update the member status field to Time to Renew, and leaders can renew their memberships, troop participations, and renewable volunteer roles for the next membership year as well as their troop members’ memberships.

Troop Leader and Household Renewals

1. Log in to your myGS Account.
2. Click on “My Household”.
3. Select “All” to renew a membership, troop affiliation, and a volunteer role; or check all that apply:
 - a. Check the membership box to renew a membership (not necessary for Lifetime Members).
 - b. Check the troop box to renew a troop affiliation.
 - c. Check the volunteer position to renew a volunteer role.

If all three boxes are checked, the status for all three will change from “Time to Renew Membership” to “In Cart.”

Troop Renewals

1. Log in to your myGS Account.
2. Select the specific troop number from the menu under “My Troops”.
3. Select the girl members to renew.

- a. Select girls individually or select “All”.
 - b. Uncheck any girls not renewing right now.
 - c. Indicate a member who is not returning next year by selecting “Not Returning”.
 - d. Hide inactive and not returning members to sort out who is returning.
4. Select the adult members to renew.
 - a. Select adults individually or select “All”.
 - b. Uncheck any adults not renewing right now.
 - c. Indicate a member who is not returning next year by selecting “Not Returning”.
 - i. If a caregiver changes their mind and wants to renew to the troop, they must contact council for assistance.
 - ii. If the leader changes their mind or makes a mistake, they must also contact council for assistance.
 - d. Hide inactive and not returning members to sort out who is returning.
 5. Scroll to the top and click the Add Renewal button

Confirm Member Details

1. Information can be edited on the Confirm Member Details screen.
 - a. Information will auto-populate for existing members who are renewing.
 - b. Avoid using the checkbox “Use My Primary Address” – this will copy the troop leader’s address to the member.
 - c. Update the “School Attending” field.
 - i. Troop leaders should be reminded to check with parents/guardians ahead of renewal to update the troop roster, and that includes verifying school data, especially as girls age up and transition to different schools.
 - d. Confirm the girl’s parent/guardian information and edit as needed. The caregiver relationship field must also be populated. If it is not, see troubleshooting below.
 - e. Avoid the “Grant Access to My Household” checkbox.
2. Choose a membership year.
 - a. If a girl is a senior in high school or 18 years old, she will renew as an adult.
 - b. To renew her to the troop, she will need to select a volunteer role.
3. Choose payment type.
 - a. Credit Card
 - i. Leaders choose credit card when a troop credit/debit card will be used as the payment method. Payment is processed immediately. The membership status updates, and the girl/adult has secured a spot in the troop for next year.
 - ii. The troop leader will be asked to confirm payment for each troop member individually.
 - iii. No additional back-office work is required by council.
 - b. Apply for Financial Assistance

- i. Leaders can only select financial assistance for members of their household; they cannot select financial assistance on behalf of troop members.
 - ii. Parents/guardians will see that a balance is due on the account. When the council approves the payment, the balance due message disappears, and the member status updates to “Active Member”.
4. Next participant (repeat the steps above until all adults and girls are completed). If the parent/guardian information is “lost” after clicking Next Participant, see trouble shooting below.
5. Click “Review Cart” to submit member details and continue with the transaction.

Review Cart

1. Review cart.
2. Edit, if necessary.
3. Check to accept the Girl Scout Promise and Law.
4. Click “Add Payment Details” button.

Payment Details

1. Review payment details.
2. Click the “Submit Payment” button to complete renewal.
3. Wait for the Renewing Payment Confirmation. (Caregivers will receive an email payment confirmation for their girl.)
4. Click the “Manage My Account” button. (Give the system a few minutes to update.)
5. Verify membership renewals. (The end dates should be updated to 9/30 of the new membership year.)

Troubleshooting

If the system does not let you submit member details, ensure that the caregiver relationship field is populated. If the caregiver relationship field is blank, enter the caregiver’s relationship.

If after confirming member details, the caregiver contact information was lost, do not click the “I am the Caregiver” box. Instead, remove that participant, and finish renewing any girls already in the cart.

Once you’ve renewed the first batch of troop members, log out of your account. Then, log back in. This resets the caregiver information, and you’ll be able to finish renewing any remaining members of your troop.

Membership Advisor Checklist

Whether you are a new or experienced Membership Advisor, this training checklist will be valuable in preparing you for a successful membership registration process in your Service Unit.

Membership Basics

- I understand the four types of GSUSA membership: Girl, Adult, Lifetime, and Extended Year, and the difference between new and renewing members.
- I understand the GSUSA program grade levels.
- I am aware that Girl Scouts of Black Diamond Council Membership Delivery staff will provide me with new troop numbers as needed for new troops.

Online Registration

- I know where to locate the online registration link on the website.
- I can modify an existing customer profile.
- I can renew an individual or troop.
- I can invite a new girl to a troop.
- I know and can explain how to designate a Volunteer Role.

Forms

- I am aware that online registration is the preferred method of registration. Only when neither the troop leader nor assistant leader(s) have access to the internet in any way (computer, phone, or tablet) should a paper registration be submitted.
- I know when and how to complete the *Girl Membership* and *Adult Membership* forms, *Summary* form, and *Request for Financial Assistance* form.

Goals

- I understand my Service Unit leadership team is assigned membership goals, and a function of my role is to promote and understand Spring Renewal and On-Time Renewal, as well as the year-end goal.
- I understand my responsibility to partner with the Membership Delivery Manager to achieve my Service Unit's membership goals.

Timeline

- I know the deadlines for Spring Renewal and On-Time Renewal.