girl scouts
of southern nevada

VOLUNTEER TOOLKIT USER GUIDE:
Troop Leader/Co-Leader

Updated: Winter 2020

The Volunteer Toolkit is your official source for delivering easy, fun troop meetings year-round! With this step-by-step guide, you can start your troop year strong and spend more time adventuring with your Girl Scouts!

VOLUNTEER TOOLKIT USER GUIDE: Troop Leader/Co-Leader

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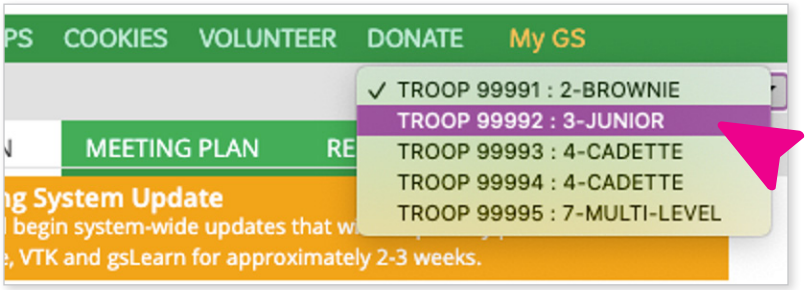
www.girlscouts.org

Who Has Access

TIP: ***If you hold multiple roles***, you'll have a Volunteer Toolkit account for each—all under one login! Look for the grey dropdown box in the upper left-hand corner of your screen to navigate between accounts.



TROOP LEADERS AND CO-LEADERS

Active volunteers registered for the current Girl Scout membership year in a troop leadership role. There should be at least two volunteers with access to the same troop account in the Volunteer Toolkit.

TROOP TREASURERS

Active volunteers registered for the current Girl Scout membership year in a troop finance/administration role. This role will only have the ability to edit and submit the finance report found on the Finance tab. All other tabs will be read-only.

CAREGIVERS OF GIRL SCOUTS IN A TROOP

Each primary caregiver has access to see their troop's Volunteer Toolkit account. They have read-only permission for the meeting schedule and agendas, plus additional resources. (Caregiver accounts can only be accessed if the troop leader has set up a year plan.

CAREGIVERS OF INDIVIDUALLY REGISTERED GIRLS, OR JULIETTES

Each primary caregiver of a currently registered Girl Scout who is not part of a troop will get troop leaderlike access with their girl(s). Access is granted through the council based on confirmation of individually registered status.

DEMO ACCESS

Available for supporting volunteer and staff roles that need access to the Volunteer Toolkit for training purposes. Demo access mirrors troop functionality but does not contain girl or troop information. These users will have two demo accounts under the gray drop-down— "Troop Demo – Troop Leader" and "Demo – Parent"—and can see both sides of the troop experience. Access is granted through the council based on placement in designated support roles.

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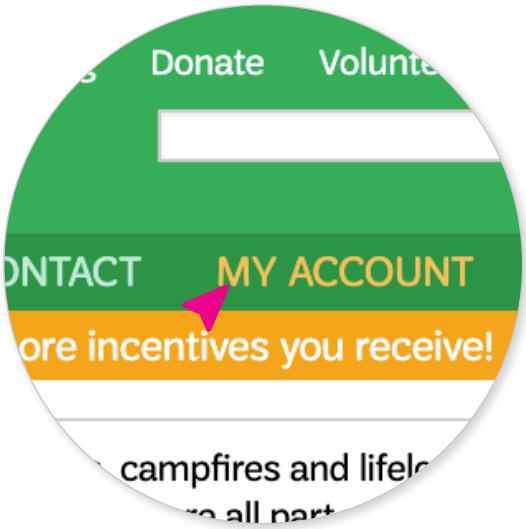
Where To Find the Volunteer Toolkit

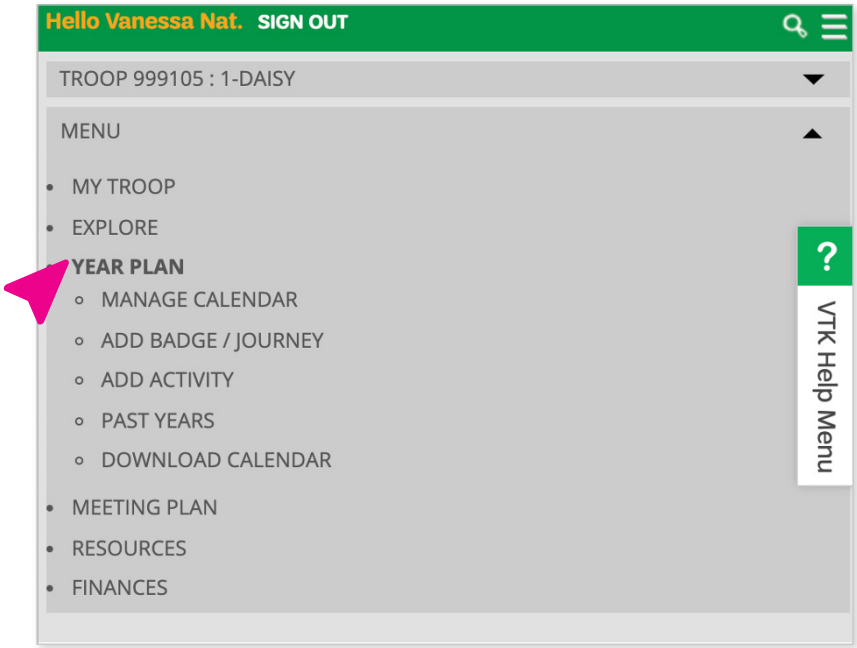
The Volunteer Toolkit can be used from any computer, tablet, or smartphone with internet access. For best results, use a Toolkit-friendly browser, such as Chrome or Firefox, with a cleared cache, and visit girlscoutsnv.org Avoid using Internet Explorer.

In the upper right corner of your screen, click "MY ACCOUNT." Select "Volunteer Toolkit" to log in using the credentials provided by your council.



Basic Navigation

The Volunteer Toolkit is divided into tabs that each have unique tools to help you plan your troop year and manage each meeting with ease. If you're on a computer, you'll see the green tabs across the top of your browser window. Mobile users will see a gray drop-down menu at the top, with tabs beneath.



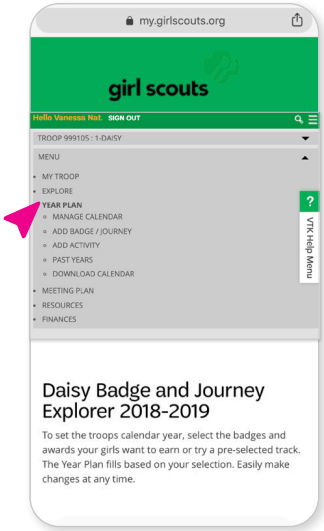
TIP: ***Print – Download – Help***

You'll notice three icons on almost every page of the Volunteer Toolkit:

Print allows you to print a copy of your current screen.

Download allows you to download calendar appointments (from the Year Plan tab), pages, and resources.

Seek additional **help** by clicking the green question mark icon or by clicking "Take a Guided Tour."



VOLUNTEER TOOLKIT USER GUIDE:
Troop Leader/Co-Leader

MY TROOP

Here you will find a complete girl roster along with family contact information and achievements. Click the green arrow next to each name to expand and see each girl's personal information, plus a snapshot of achievements and attendance.

From this tab, you can also email caregivers, download and print a roster with girl achievement and attendance information, renew memberships, and customize the page with a troop photo.

- **Caregiver users and individually registered girl users** will only see their own Girl Scout's information.
- **Demo users** will see sample information for placement only, which is not tied to any specific troop or girl.

EXPLORE

You'll find the exciting options for your troop this year under the Explore tab, including prebuilt tracks based on your troop's Girl Scout program level. You can also browse individual badges and meeting types to build a plan from scratch. Once you've made a choice, your year plan will be automatically populated. Selecting a year plan is required before other features become available, but don't worry—you can always change your plan as you go, one meeting at a time.

From this tab, you can also preview prebuilt tracks of badge and Journey activities , preview individual badge or award requirements, and download or print an overview of each preselected track so you can easily review options with your girls at your first meeting!

- **Caregiver users and finance users** will not see the Explore tab.

YEAR PLAN

From this tab, you can schedule meetings, add or swap out badges or awards, and fine-tune your Girl Scout year. For a walk-through of all the tools at your fingertips, click "Take a Guided Tour" on the Year Plan tab.

From this tab, you can also set meeting dates and locations, add more custom and council activities, preview requirements, and view previous years and important milestones from your local area.

- **Caregiver users and finance users** will see a read-only version of the year plan their troop leader has built in the Volunteer Toolkit.
- **Demo users** will be able to see the plan they set up under "Demo – Troop Leader" in "Demo – Parent" so they can learn both sides of the system.

MEETING PLAN

Here you'll find the tools to make each badge, award, meeting, and activity a success. We've provided meeting prep information, materials lists, and even suggested scripts for many activities.

From this tab, you can also find virtual meeting resources, customize meeting schedules, track attendance, and check off completed badges and awards.

- **Caregiver users and finance users** will see a read-only version of the meeting plan their troop leader has added to their year.

RESOURCES

Under this tab, you'll find answers to your pressing Girl Scout questions—like where to put pins or badges on a uniform, which special awards your girls can earn, or how to lead favorite Girl Scout traditions—along with national and local resources by topic.

From this tab you can also gain access to the Girl Scout shop from each program level, download reference documents for all the awards a Girl Scout can earn, and explore tips for troop leaders and other roles. All user types can see this tab and interact with it in the same way.

FINANCES

From this tab, you can easily share your troop's year-end finance report and other necessary information to wrap up the troop year. You can also add receipts or other attachments to your form and send them directly to your council. You'll be sent a confirmation email with a copy of the report as well.

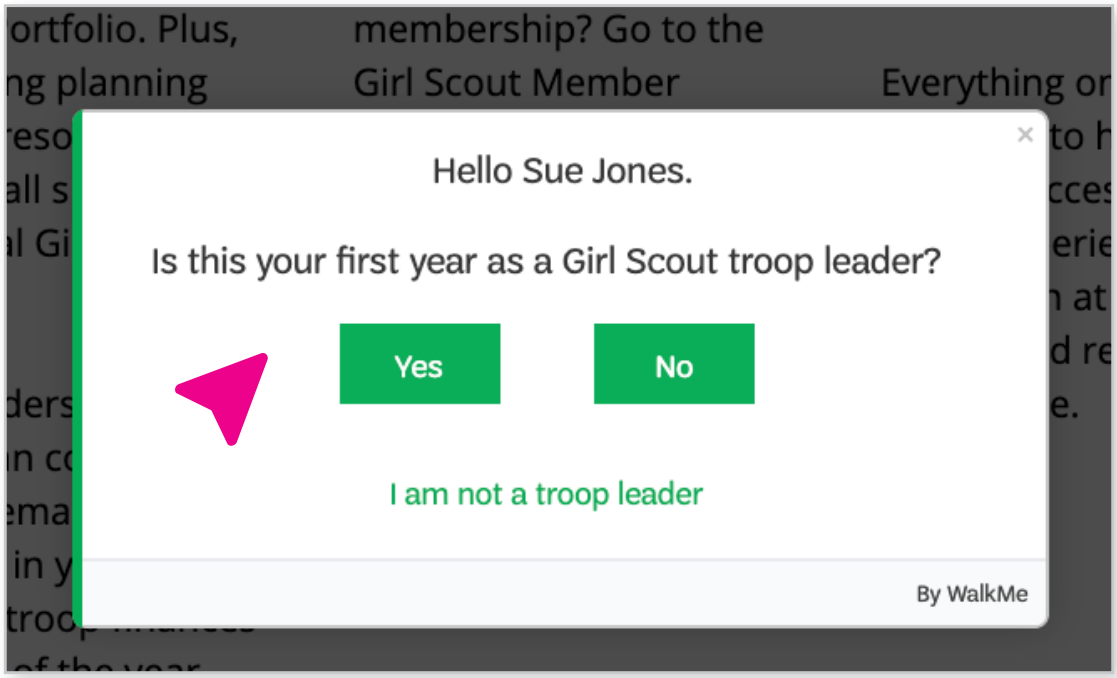
- **Caregiver users** will see a read-only version of the report once it is submitted.
- **Finance users** will be able to edit and submit this tab for their troop.
- **Individually registered girl/Juliette users** will not see this tab.
- **Demo users** will be able to see and interact with this tab, but they will not be able to submit it.

VOLUNTEER TOOLKIT USER GUIDE:
Troop Leader/Co-Leader

First-Year Troop Leader Experience

New leaders: need help getting started? We've got you. The First-Year Troop Experience supports new leaders with additional guidance to get you acquainted with the Volunteer Toolkit. After logging in and navigating into the Volunteer Toolkit, you'll be prompted answer the question, "Is this your first year as a Girl Scout troop leader?" If you answer "Yes" you will follow a guided path with recommended steps to simplify your onboarding process.

If you're not a first year Girl Scout troop leader, but would like to see the guided path, click "Take a Guided Tour" on any of the Volunteer Toolkit tabs to see the same guidance that a new leader would.



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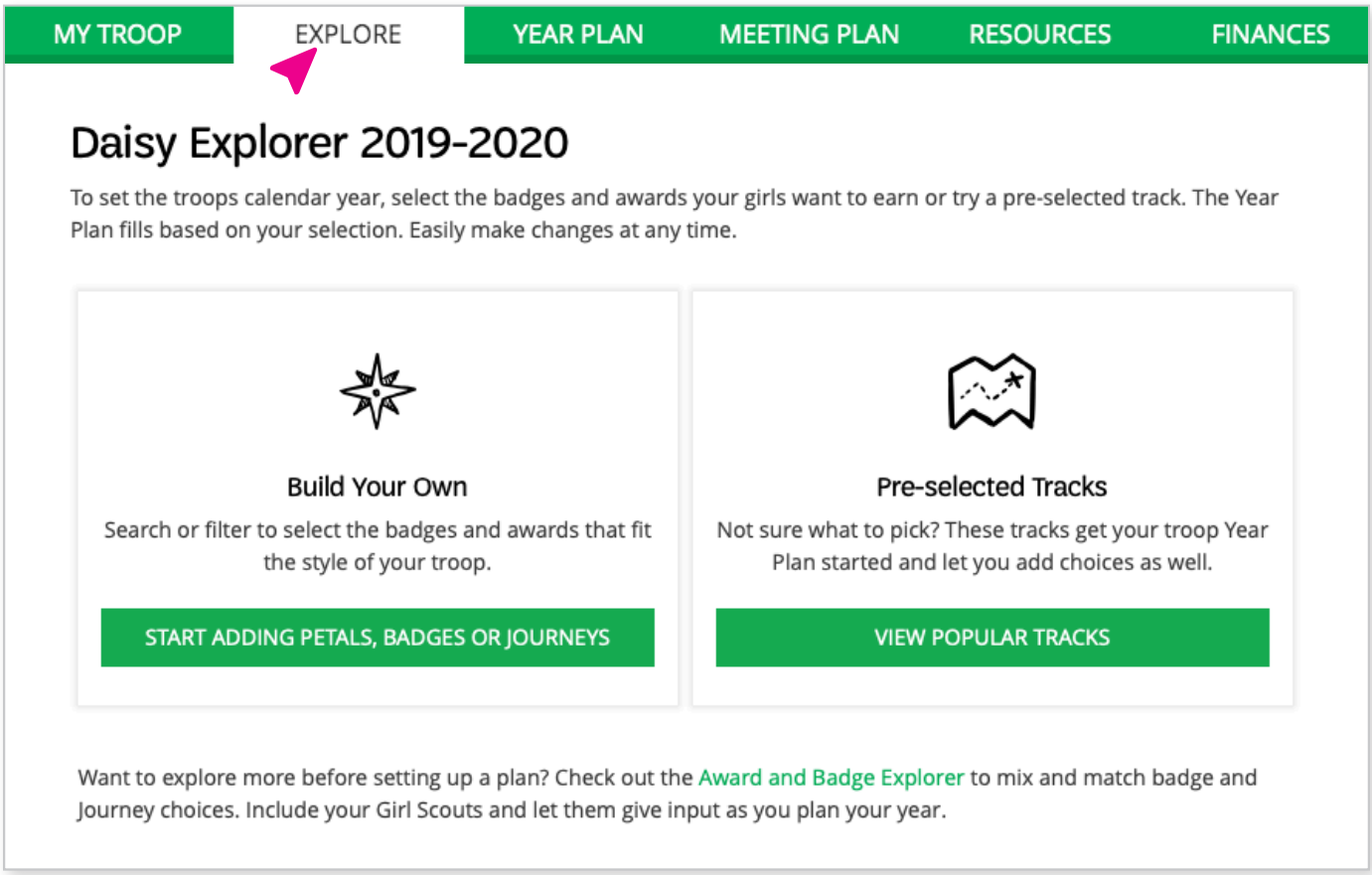
VOLUNTEER TOOLKIT USER GUIDE:
Troop Leader/Co-Leader

Set Up Your Year Plan

The first time you log into the Volunteer Toolkit, you'll be taken to the Explore tab. From here you can visit the My Troop, Resource, or Finance tabs, but to activate the Year Plan and Meeting Plan tabs you need to first make a selection under the Explore tab.

If you aren't seeing the correct grade level for your troop, please contact Customer Care at customerservice@girlscoutsnv.org.



Before setting up your year plan, you can also check out the Award and Badge Explorer from the bottom of the tab to mix and match potential award options in a PDF, and to share or make decisions with your girls. Once they've decided, you can always come back to build out the schedule for those badges and awards.

VOLUNTEER TOOLKIT USER GUIDE:
Troop Leader/Co-Leader

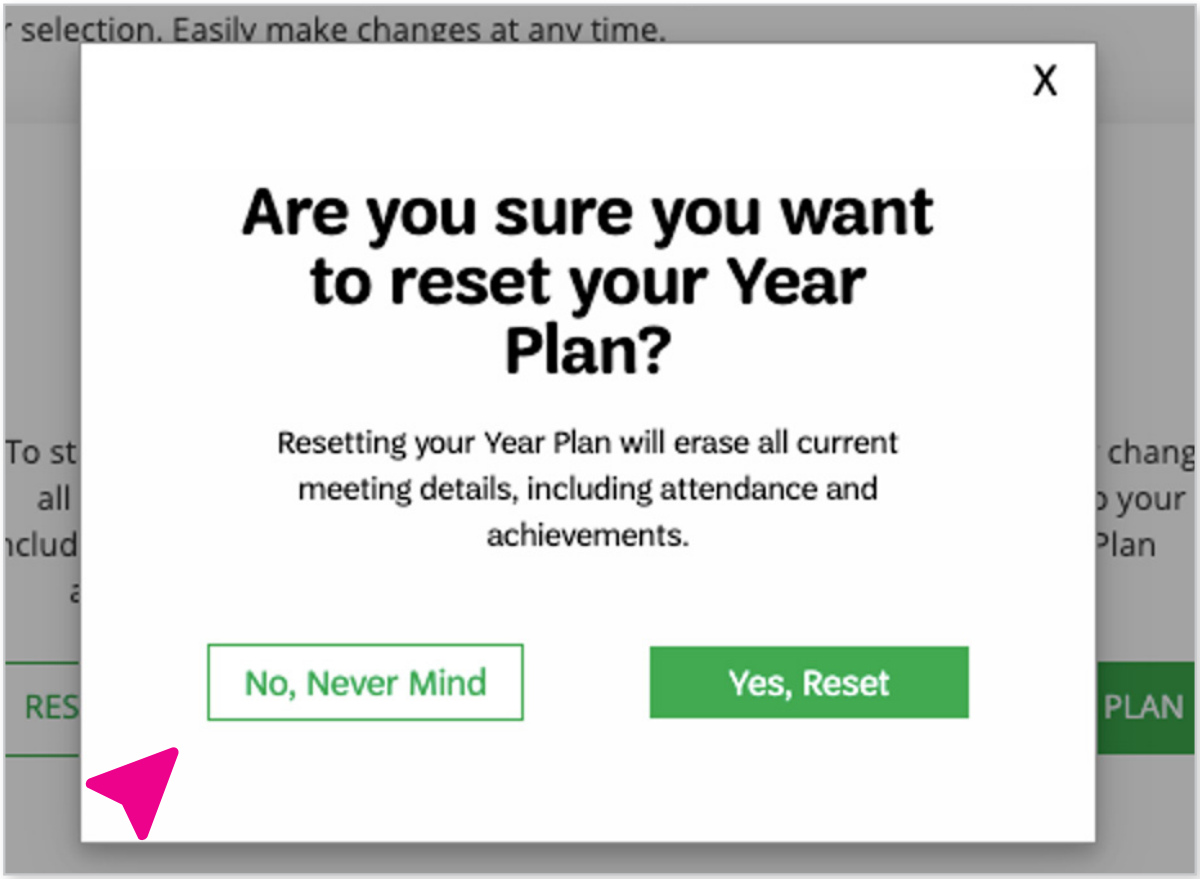
EXPLORE MEETING PLANS

Build a year plan that's completely customized to your troop's interests! You can mix and match meeting plans that work toward the badges, Journeys, and activities that excite your girls. You can also search through all badges and Journeys, regardless of your troop's program level. Use the available filters, or search for specific meetings and simply select the ones you'd like to use in your year plan. Once you're finished, click "Add to Year Plan" at the bottom to move forward in the system.

PRESELECTED TRACKS

Not sure which meeting plans are right for your troop? You can also choose from a preset collection of meetings with the preselected tracks option instead. Click "View Popular Tracks" to preview each combination of awards and download them, if needed. Once you've decided, click "Select Track," and your year plan will be created. You'll automatically be taken to the Year Plan tab. This is also the tab you'll be brought back to each time you log in from now on.

Important: each time you choose a new year plan from the Explore tab, your entire year will be reset. Any activities, meeting dates, and customizations that had been added will be lost. To add badges and Journeys to your existing year plan, use the buttons at the top of the Year Plan tab.



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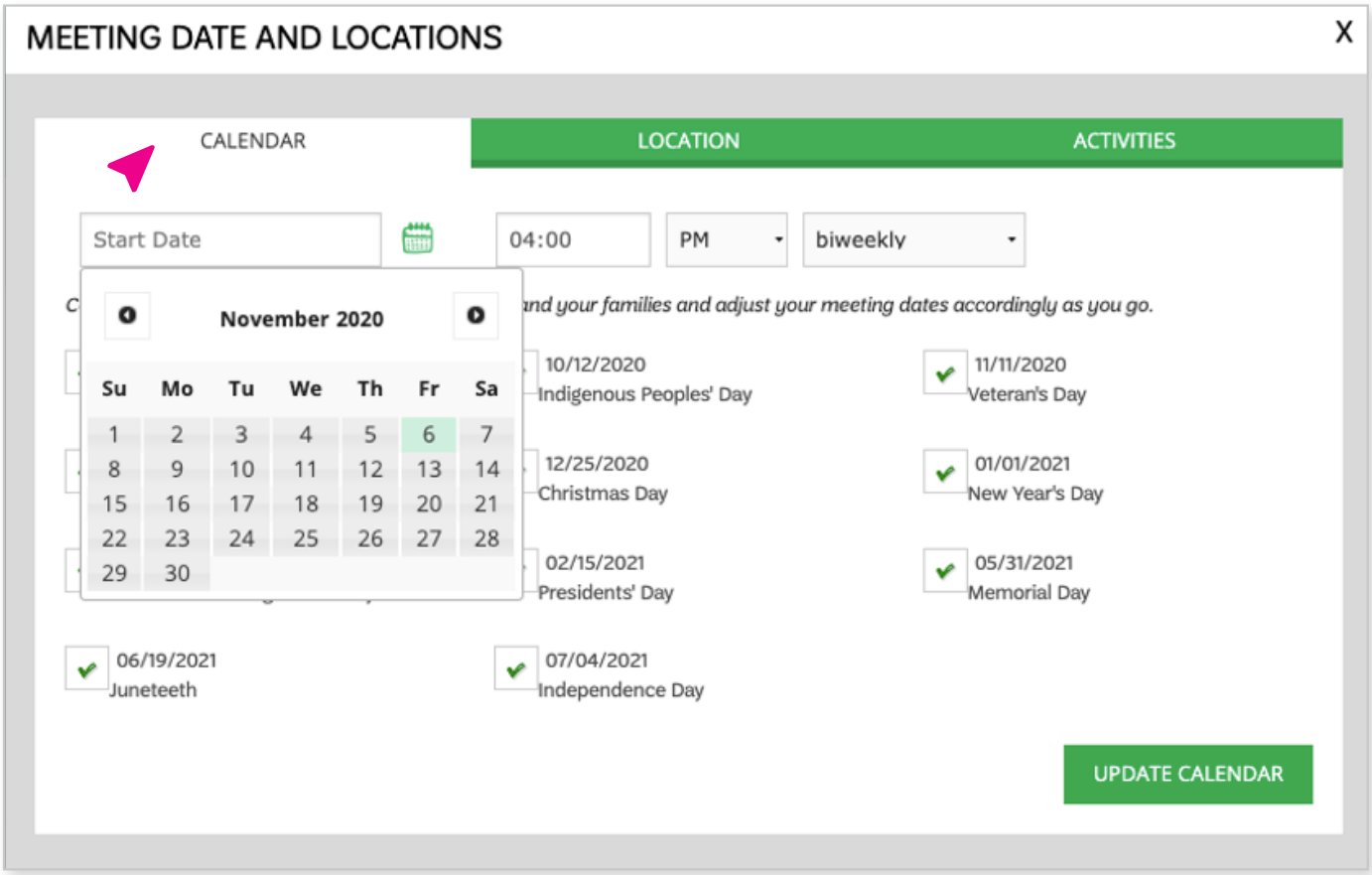
Troop Leader/Co-Leader

Set Up Your Calendar

You're almost ready to unlock everything the Volunteer Toolkit has to offer—your last step is setting up calendar dates for your meetings. Once you're on the Year Plan tab, click "Manage Calendar," select a start date for your meeting cadence to begin, and choose the frequency of your meetings and a general start time. Dates and times can be changed meeting by meeting after this step; simply select any combination to get started.



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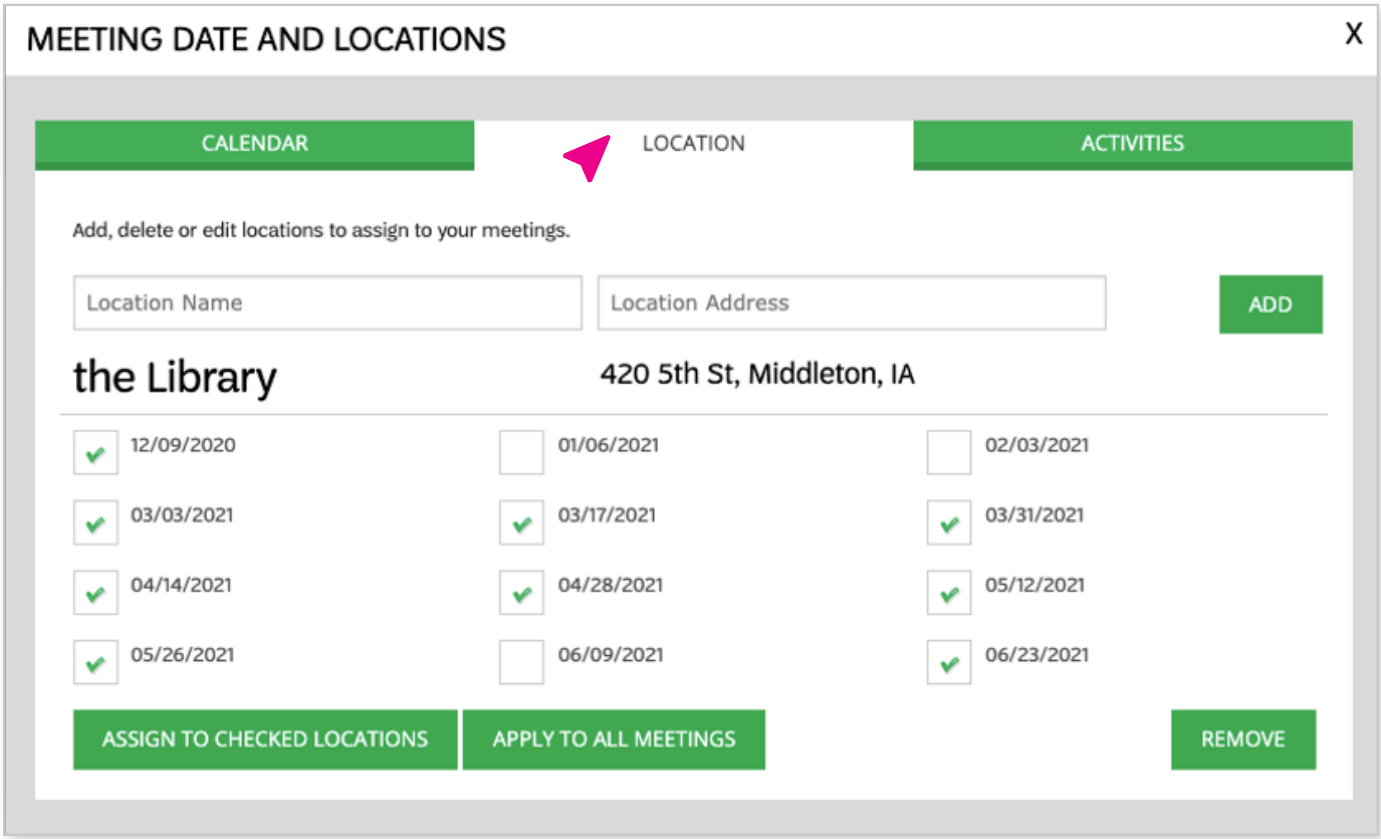
Troop Leader/Co-Leader

LOCATION

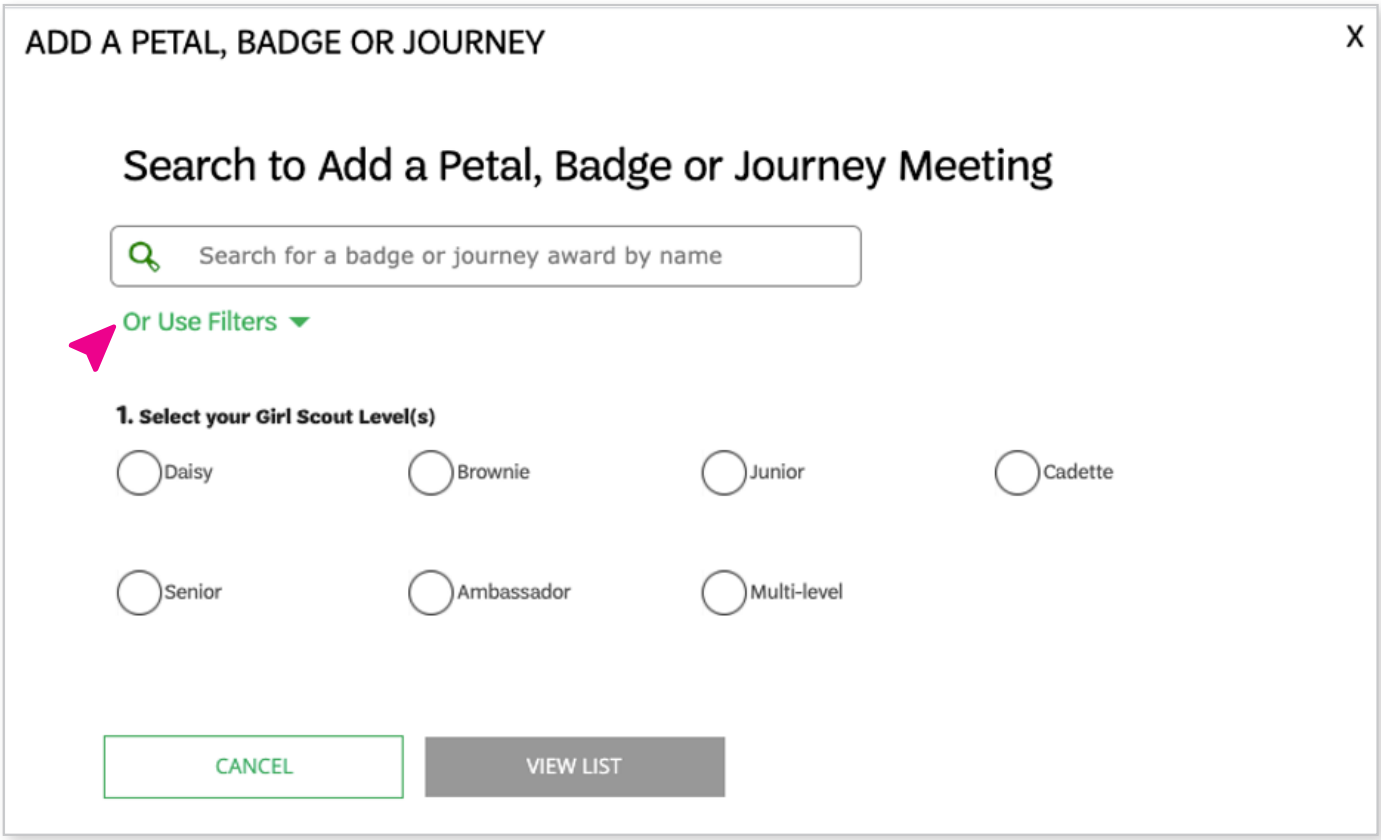
Now that your dates are set, you can add a physical address or virtual meeting link to each. If you're meeting in different locations or a combination of in-person and virtual meetings, add each address or link, then connect them to the appropriate meeting(s) using the checkboxes. Click "Assign" or "Apply," and then close out of the window. You can change the location for a meeting in multiple ways—by clicking on a date in your year plan, changing a date quickly, or selecting "See More Calendar Options," and also on the Meeting Plan tab.



Adding Meetings and Activities

ADD OR CHANGE MEETINGS TO YOUR YEAR PLAN

Girl Scouts are ready for whatever comes their way—and that includes changes in meetings or their year plan. Start by using the green Add badge/Journey link at the top of the year plan or the Search to Add Meetings link at the bottom of the year plan. Use the search feature or filters to sort through available meeting types and choose which ones to add to your year plan. Meeting titles with numbers at the end are part of a series, and you'll want to add all of these to meet the requirements for the award. Meetings already in your plan will be clearly marked. Once you've made your selections, click "Add to Year Plan."



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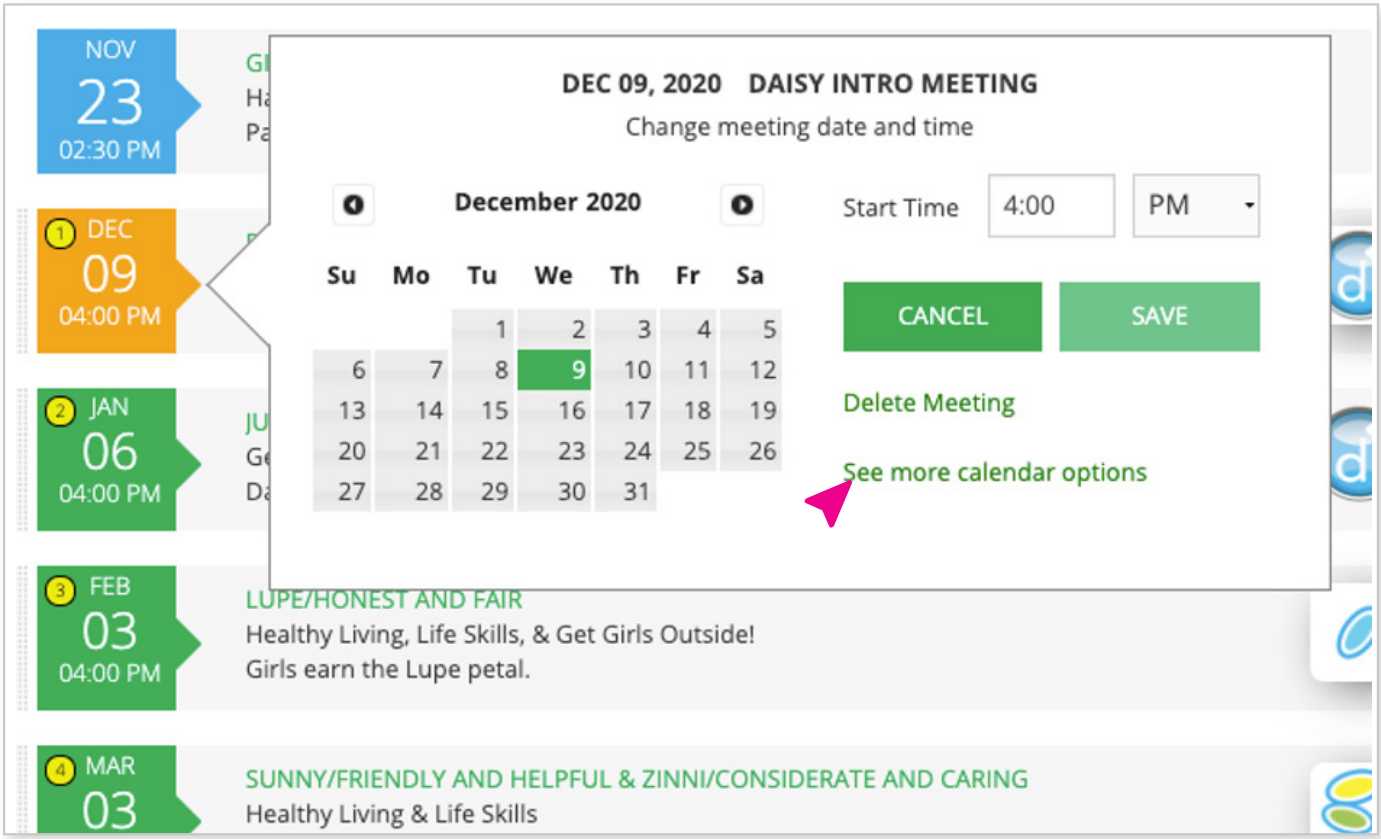
Troop Leader/Co-Leader

EDIT MEETING DATES AND TIMES

Click the calendar date to the left of each meeting date to change the date or time of that specific meeting. You can also choose to cancel one or more meetings, or to combine meetings. To combine meetings, select the two meetings you'd like to combine, then select the new date on which you would like that meeting to occur. After you've made changes, click "Save" and your year plan will be updated. If you go back to Manage Calendar, to the right of each meeting date you'll see a green gear icon. This takes you back to the original view of the Meeting Date and Location widget, where you can reset the entire cadence of your meetings, if needed.



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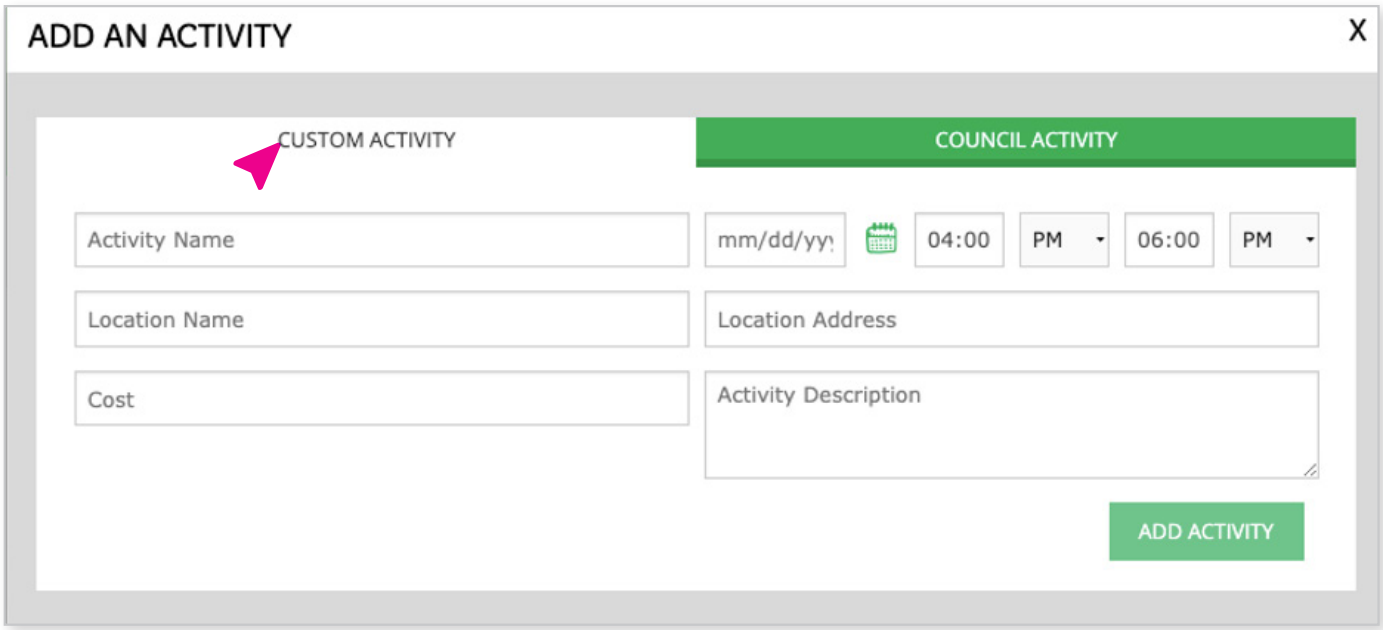
Troop Leader/Co-Leader

ADDING OTHER TYPES OF ACTIVITIES

Meetings and badges are only one part of a go-getting Girl Scout's troop year! You can add things like field trips, service projects, or cookie booth sales to your year plan as well. The Volunteer Toolkit connects to your council website and gsEvents so you can browse and add local council events, too. Any activity you add will appear in blue and show up chronologically. At the top of the year plan, click "Add Activity."



CUSTOM ACTIVITY

Add your activity name, date, time, location, and details to your year plan. Remember: caregivers will see this information too, so be sure that event details are clear and any special instructions are included here.

COUNCIL ACTIVITY

Search or filter through council events and add them to your year plan. This feature does not register you or your group for the event; it only adds the event to your year plan.

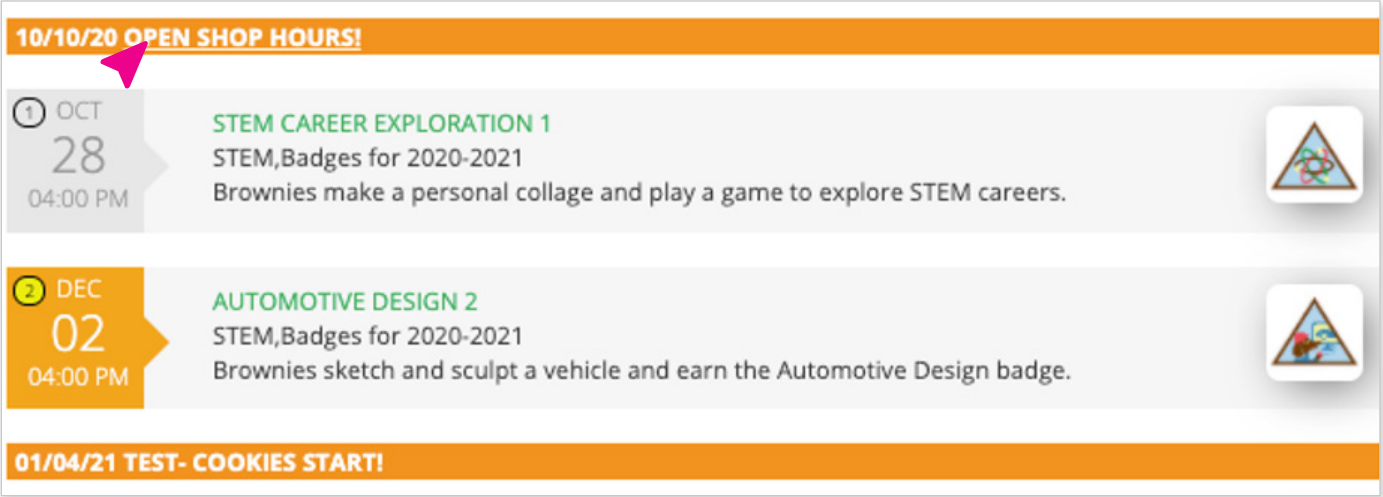
VOLUNTEER TOOLKIT USER GUIDE:
Troop Leader/Co-Leader

View Past Year Plans

Each July, the Volunteer Toolkit resets and archives your year plan. At that point, you'll no longer be able to make changes to any of your meetings. However, you'll still be able to view the plan through the green Past Years link at the top of your Year Plan tab. Note that **achievement and attendance records do not archive**; please download a copy of this information for your records. Caregivers can also download a copy of their own Girl Scout's achievements from the My Troop tab.

Milestones

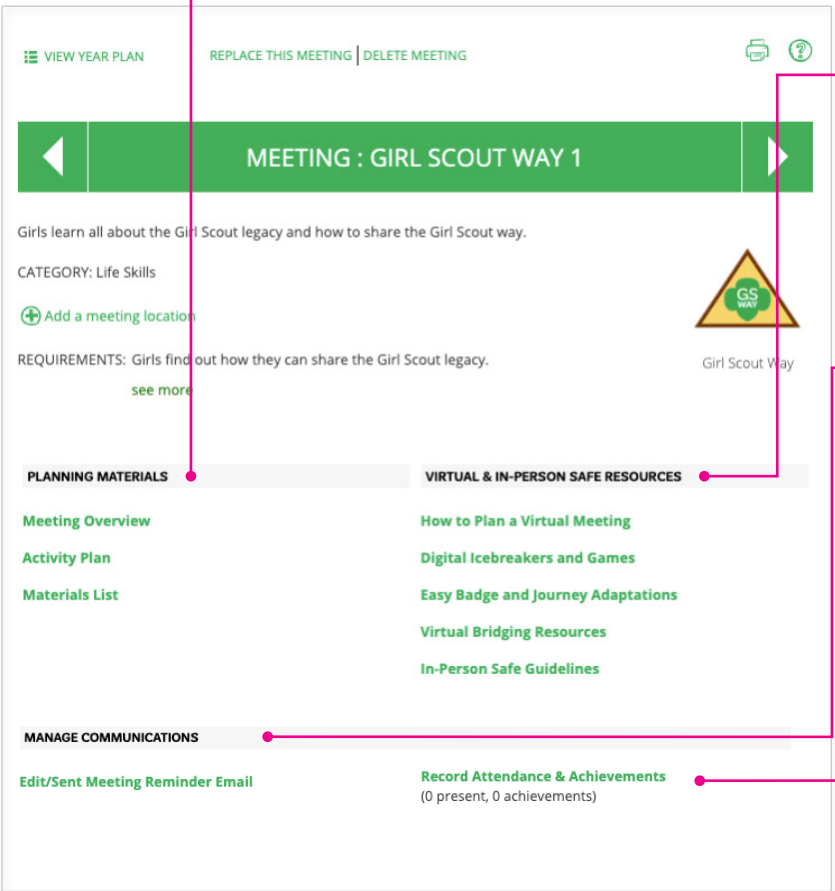
You might see orange bars across your Year Plan tab in chronological order with your other meetings and activities. These are important dates, events, or updates your local Girl Scout staff want you to know about. These may also include links to additional information that relates to the date and title of the milestone.



VOLUNTEER TOOLKIT USER GUIDE: Troop Leader/Co-Leader

Tools for Planning Your Meeting

The Meeting Plan tab has a robust collection of tools and information to help you plan an engaging meeting every time. If at any time you want to replace or delete a meeting, just use the respective links at the top of the meeting plan.



PLANNING MATERIALS: High-level resources show you from start to finish what your girls will achieve during the meeting (1. Meeting Overview), what you'll do and say (2. Activity Plan), and the meeting aids plus the materials you'll need (3. Material List).

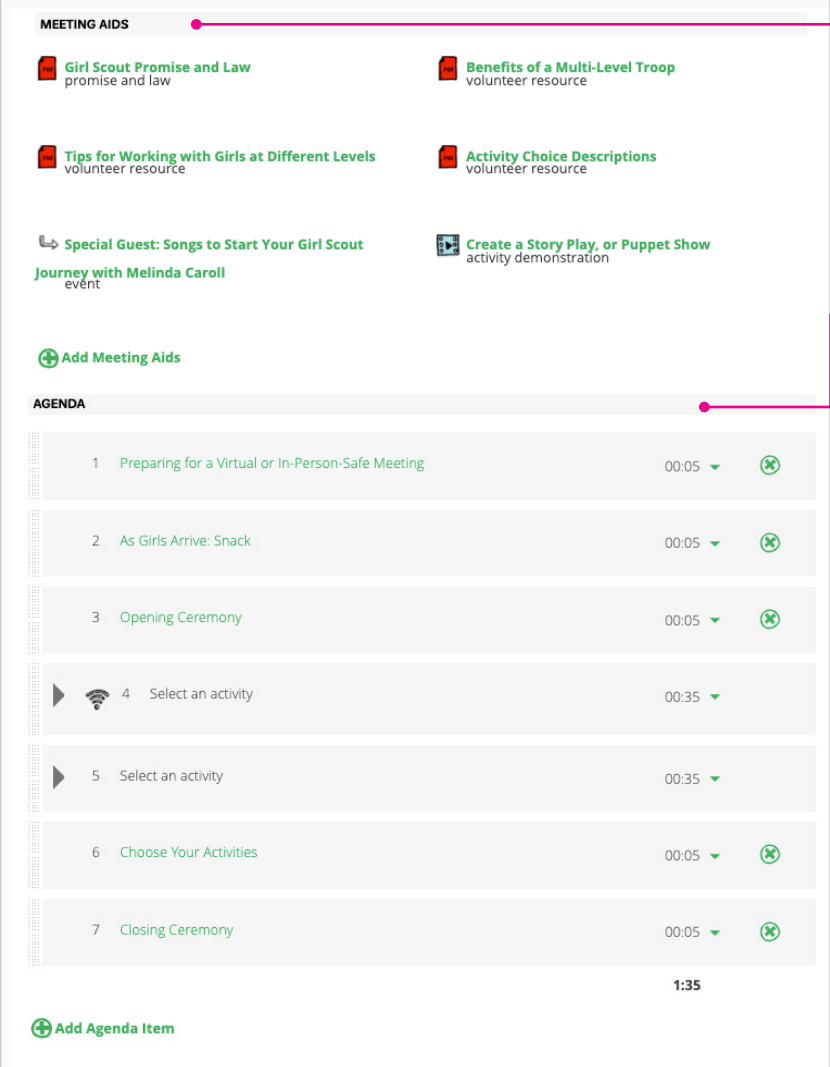
VIRTUAL AND IN-PERSON SAFE MEETING RESOURCES: Holding meetings over video or virtual platforms? These specially designed resources offer guidance on how to adapt activities, add more social time, and handle materials at home. Caregivers can also access these resources.

MANAGE COMMUNICATIONS: Send emails to caregivers to remind them of meetings and keep them up to date on what's happening. Emails are pre-populated with relevant meeting information, but you can customize them based on your needs. You can even attach meeting aids or other relevant documents from your council website at the bottom of the screen before sending.

ATTENDANCE AND ACHIEVEMENTS: Here you can also record attendance and achievements. Use the checkboxes to mark who's at the meeting—and if it's a meeting where you have earned a badge or award, you can mark that, too. You can see the full list of what a girl has earned on the My Troop tab, with the option to download the report.

VOLUNTEER TOOLKIT USER GUIDE: Troop Leader/Co-Leader

Tools for Planning Your Meeting (continued)

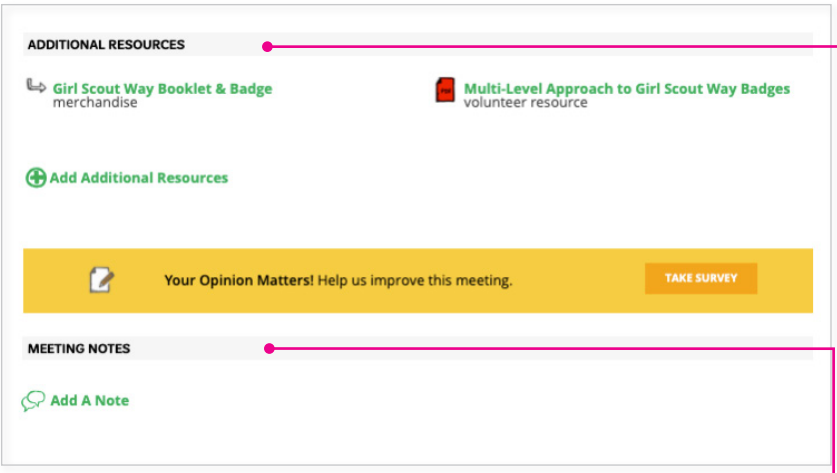


MEETING AIDS: These documents, videos, and links are the leg up you need to complete the activities in each meeting! Some are geared toward the adult supporting the meeting, and some are for girls completing the activities. You can find more information on how to use these resources in the activity plan.

AGENDA: Here you'll find instructions and details for each activity, needed materials, time it takes to complete, and recommended sequencing. You'll also find opening and closing activities to round out your meeting. There are lots of ways to customize your meeting agenda:

- Drag and drop activities to reorder in the agenda.
- Use the drop-down on an activity to change the amount of time allotted for that activity.
- Delete an activity by clicking the "X" to the right of the activity. Heads up: if you accidentally delete a required activity for earning an award, you won't be able to add that activity back without first deleting the meeting.
- Click "Add Agenda Item" at the bottom to add your own activities!

Tools for Planning Your Meeting (continued)



ADDITIONAL RESOURCES: Take your meeting topic to the next level with these additional resources! These include videos, documents, or suggested events that go beyond the required steps for a badge or award, and they can help your girls do a deeper dive into the content they're most excited about. Here you'll also find links to the Girl Scout Shop to purchase printed award booklets or the award themselves. Finally, you can also save your own links here as well as long as they have a URL. These materials connect to the Manage Communication email templates, so you can share them with families.

NOTES: Add a note at the end of a meeting plan with any important reminders or meeting details for yourself or other troop leaders.