



## New Troop Leader, Troop Admin, Troop Program Guide Checklist

This checklist will keep you on track during your first four-six weeks of your new leadership role. Feel free to reach out to local volunteers (Service Unit Troop Mentor, Service Unit Director) and/or your staff person (Community Membership Executive - CME) if you need help or clarification on any of the action items below.

### Weeks 1-3

- Review the [Troop Leader, Admin, or Program Guide Position Description](#).
- Register to attend an upcoming [New Leader Orientation Webinar](#): Visit [gsneo.org/events](https://gsneo.org/events) to register.
- Visit [gsLearn](#) and complete the **New Troop Training** modules.
- Read and become familiar with our [Volunteer Policies, Volunteer Essentials, and Safety Activity Checkpoints](#)
- Log into MyGS to view your troop roster and begin using the Volunteer Toolkit (VTK) to plan your Girl Scout year.
  - **Newly forming troops that have not started meeting yet:**
    - New leadership should contact the families on the troop roster to introduce yourself and provide a timeframe of when meetings will start. Determine troop meeting time, day, frequency, and location– it's your choice! Reach out to your local SU Team/GSNEO staff person for popular meeting location ideas in your area if needed.
    - Once you have secured your meeting location - Reach out to families and invite them to [a parent/caregiver meeting](#). Check out our *step-by-step guide* and "*Parents & Caregivers Meeting Outline*" on the VTK. Make sure to bring copies of the [Annual Permission](#) and [Personal Health and Medical](#) forms.

### Week 2-4

- **Open your troop bank account (new troops) or update bank account signatures (established troops)**
  - **New Troops:** Review the steps on [how to open a troop bank account](#), and submit a [request to open your troop bank account](#). Once your request is approved by the GSNEO Finance Department via email, the signers will go to the bank and open the new account.
  - **Established Troops with New Leadership:** If your troop needs to update which volunteers are signers on the troop bank account, complete the [Request to Change Bank Account Signers Form](#) prior to going to the bank. The GSNEO Finance Department will approve the change via email and then the new signers can go to the bank.
- **Bank Account Signers:** Visit [gsLearn](#) and complete the **Money Matters** modules.
- *Optional for Newly Forming Troops:* [Submit a Loan Request for a Newly Formed Troop](#) after you have opened your troop bank account and submitted the account numbers to the GSNEO Finance Department.
- **Hold/attend your first troop meeting:** Make sure to use the Volunteer Toolkit (VTK) when planning your meeting. Invite the Service Unit Troop Mentor or other local volunteer for additional support.

### Week 4+

- Attend your local **Service Unit Volunteer Meeting and check your email for an invitation to the Welcome to the Service Unit Orientation (If your area has local Service Unit Team volunteer support)**.
- Ensure that one or more adult members of your troop is trained in [First Aid/CPR](#).
- Continue to welcome new members as they join and order supplies to [invite new friends to join your troop!](#)
- Complete the [Troop Changes Form](#) to update your troops meeting information, desired number of girls, and more!

*Thank you for volunteering with us and congratulations on your new leadership role*