VOLUNTEER TOOLKIT USER GUIDE:
Troop Leaders & Assistant Troop Leaders

Updated: Winter 2020

The Volunteer Toolkit (VTK) 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!
Who Has Access

SERVICE UNIT VOLUNTEERS
Volunteers who hold the following service unit roles are granted access: Leader Support Manager (LSM), Membership Support Manager (MSM), and Program Support Manager (PSM).

TROOP LEADERS & ASSISTANT TROOP LEADERS
Active volunteers registered for the current Girl Scout membership year in a troop leadership role. Volunteers in this role have full access to all VTK functionality.

TROOP TREASURERS
Active volunteers registered for the current Girl Scout membership year as the troop treasurer 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 VTK account. They have read-only permission for the meeting schedule, agendas, troop finances, and resources. (Caregiver accounts can only be accessed if the troop leader has set up a year plan.)

CAREGIVERS OF GIRL SCOUTS NOT IN A TROOP (JULIETTE/INDIVIDUALLY REGISTERED MEMBERS)
Each primary caregiver of a currently registered Girl Scout who is not part of a troop will get troop leader-like access with their girl(s). Access is granted through the council based on confirmation of individually registered status.

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

The Volunteer Toolkit (VTK) can be used from any computer, tablet, or smartphone with internet access.

1. Go to our website, www.gsnorcal.org, and click the MyGS link at the top of the screen.
2. Log in using the username and password you created when you setup your Girl Scout member account.
3. Once logged in, click My Account in the upper right-hand corner of your screen.
4. Select Volunteer Toolkit from left side menu.

VTK Troubleshooting

For best results, use a VTK-friendly browser such as Chrome or Firefox with a cleared cache and visit www.gsnorcal.org.

NOTE: Avoid using Internet Explorer.

Steps to resolve VTK access issues on a desktop/laptop

- Clear browser cache and browsing history
- Ensure cookies are enabled
- Add cdns.gigya.com as a safe URL to any privacy/security extensions or settings on your device and/or browser
LOOK WHAT’S NEW!

Demo Access

Available for supporting volunteer and staff roles that need access to the Volunteer Toolkit (VTK) 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.

Troop Leader View: Troops that you are affiliated with show up first. Troop Leader view provides full access to all VTK functionality. This is where you will set your year plan, troop meetings, and manage your troop roster and communications.

Demo Troop Leader: 7 – Multi-Level View: This view is available so that troop leaders have easy access to program materials and troop meeting content for all program levels. Note: This is the same view that service units, Individually Registered Girls (IRGs), and multi-level troops see.

Demo Parent: 7 – Multi-Level View: This view is available so that troop leaders can see and experience the Parent View in VTK. Note: This view is linked to the Demo Troop Leader: 7 – Multi-Level view and you will need to set a year plan in the Demo Troop Leader: 7 – Multi-Level in order to see the Demo Parent: 7 – Multi-Level.

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 on-boarding 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.
Basic Navigation

Welcome to the Volunteer Toolkit! We’ve outlined everything you need to know to get started and have the best troop year ever!

The Volunteer Toolkit is divided into tabs that each have unique tools to help you plan your troop year and manage each meeting. If you’re on a computer, you’ll see the GREEN TABS across the top of your browser window.

You’ll also find exciting Girl Scout partnerships and promotions in the rotating banners at the top of your screen. Tired of seeing them? Just click the “X.”

Mobile users will see a grey drop-down menu at the top of their screen, with tabs beneath.

You’ll notice these three icons on almost every page of the VTK.

Print your current screen by clicking the green printer icon.

Download the page or resource by clicking the green down-arrow bracket icon.

Seek out additional help by clicking the green question mark icons OR by clicking the binoculars next to Take a Guided Tour.
This tab houses your complete girl roster along with each girl’s family contact information. Click the green arrow next to each name to expand and see her personal information and a snapshot of achievements and attendance. From this tab you can also:

▶ Email caregivers
▶ Download and print a troop roster with achievement and attendance information
▶ Renew memberships
▶ Customize the page with a troop photo

NOTES:

▶ Access your other troops from the drop-down menu at the top of your screen.
▶ Caregiver users and individually registered girl users will see their own Girl Scout information.
▶ Demo users will see sample information for placement only, which is not tied to any specific troop or girl.
▶ Demo users will see a read-only version of the meeting plan their troop leader has added to their year.
▶ Caregiver users and finance users will see a read-only version of the report once it is submitted.

The FINANCES tab is where you can submit the Annual Troop Financial Report to GSNorCal, which is due by May 15th. Entering troop financials into the VTK Finance tab ensures clear reporting and oversight for all troop income and expenses.

Meeting prep information
Printable meeting aids
Meeting themes
Using G要做
Meeting prep information
Success. We’ve provided: a meeting and activity for every meeting deans and meeting dates and times. From this tab, you can:

Schedule meetings
Set meeting dates and locations
Add or swap badges, meetings and activities
Preview individual badge requirements
Add custom activities
Add or swap badges, meetings and activities
See meeting dates and times. From this tab, you can:

▶ Download and print a troop photo
▶ Customize the page with a troop photo
▶ Access your other troops from the drop-down menu at the top of your screen.

The RESOURCES tab gives you all the exciting options for your troop year in the Explore tab. Click the green arrow next to the EXPLORE tab to find all the exciting options for your troop year in the Explore tab. From this tab, you can:

▶ Browse prebuilt tracks of badge and Journey activities based on your troop’s program level
▶ Browse individual badges and meeting types to build a plan from scratch
▶ Preview individual badge or award requirements
▶ Download or print an overview of each preselected track so you can easily review your options with your girls at your first meeting! 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 add, remove or change your plan when you’re ready. You’ll find all the exciting options for your troop year in the EXPLORE tab.
Set Up Your Year Plan

The first time you log in to 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 to start a year plan, under the Explore tab.

If you aren’t seeing the correct grade level for your troop, please contact Member Services at info@gsnorcal.org.

- **IMPORTANT:** Each time you choose a new year plan from the EXPLORE tab, your entire year will be reset. Any activities added, meeting dates, and customizations will be lost. To add badges and Journeys to your existing year plan, use the buttons at the top of the YEAR PLAN tab.

- **TIP:** Quickly access the Award and Badge Explorer from the bottom of the tab to mix and match potential award options in a PDF to share and make decisions with your girls. Use this to come back and create a custom plan as unique as your group.

Junior Explorer 2020-2021

To set the troop’s calendar year, select the badges and awards your girls want to earn or try a pre-selected track. The Year Plan fills based on your selection. Easily make changes at any time.

- **Explore Meeting Plans**: Search and filter to preview individual meeting plans to customize a plan all your own.

- **Pre-selected Tracks**: Not sure what to pick? These tracks get your troop Year Plan started and let you add choices as well.

Want to explore more before setting up a plan? Check out the Award and Badge Explorer to mix and match badge and journey choices. Include your Girl Scouts and let them give input as you plan your year.
**EXPLORE MEETING PLANS** allows you to build a year plan that's completely customized to your troop's interest! You can mix and match 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 filters or search for specific meetings and simply check **Select to Add Meeting** next to the badges and Journeys you want to add to your year plan. Once you're finished, click **Add to Year Plan** at the bottom.

**TIP:** Click the badge **Preview** button to see the badge meeting overview, activity plan, materials list, meetings aids, and agenda BEFORE you add it to your year plan. If you like what you see, add it to your Year Plan.

**PRESELECTED TRACKS** are a preset selection of meeting plans for a specific Journey or set of badges. Click **View Popular Tracks**, and from there you can **Preview** each combination of awards. Use the printer icon under each preview to download or print a copy of the Year Plan. Once you've found the right one, click **Select Track** and your year plan will be created.

Once you've made your selection in the **EXPLORE** tab, 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.

**TIP:** Click on the badge images to the right. Some meetings will give you an overview of the badge requirements.
Add Dates and Locations

**CALENDAR:** To continue planning your year, you must set meeting dates for your year plan. What day will your meetings begin and how often will you meet? What time will your meetings generally start?

At the top, click the green **Manage Calendar** link. Using the pop-up widget, select a start date for your meetings to set the order of your meetings. Choose the frequency and a general start time. Don't worry, you can still make changes after this; simply select any combination to get started. Click **Update Calendar** when finished.

Once you've set this up, when you use the Manage Calendar link again, you'll notice it looks entirely different! Now you can customize each individual meeting, add the location, or even reset the entire schedule.
EDIT MEETINGS: Select the green calendar icon 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 combine meetings. Select the two meetings you'd like to combine, then select the new date that meeting will occur. After you've made any changes, click Save and your year plan will be updated.

TIP: Manage Your Meetings

Select the calendar icon to change date or time, or cancel or combine meetings.

Select the gear icon to reconfigure calendar from a specific date forward.

LOCATION: Now that your dates are set, you can connect an address to each one. If you're meeting in multiple locations, add each address then connect it to the appropriate meeting using the check boxes. Click Assign or Apply and then close out of the window.

TIP: You can also get to the Meeting Date and Location widget simply by clicking on a date in your year plan. Change a date quickly or select See More Calendar Options.

TIP: Virtual Meetings

Instead of a physical address, you can add links for your virtual meetings here.
VOLUNTEER TOOLKIT USER GUIDE: Troop Leader & Assistant Troop Leader

Year Plan Tab

The **YEAR PLAN** tab appears first each time you sign in, once your track is chosen. Your typical view will display the following:

**Gray boxes:** Past meetings & activities. Past events cannot be moved or edited.

**Orange bars:** Milestones set by GSNorCal to remind troops of important dates in the Girl Scout year. They may include links to additional information.

**Blue boxes:** Added activities. You can list council, service unit, or troop activities such as cookie booth dates.

**Orange box:** Next meeting.

**Green boxes:** Future meetings. Upcoming meetings can be moved using the bar in front to drag and drop into a new place.

**TIP:** View Past Year Plans - Each July the VTK resets. Your year plan will be archived and you’ll no longer be able to make changes. However, you’ll still be able to view the plan through the green Past Years link at the top of your **YEAR PLAN** tab.

Achievement and attendance records **DO NOT** archive. Troop leaders and caregivers can download a copy for records.

Add Badges, Journeys, and Awards

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** 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. Meetings already in your plan will be clearly marked.

Once you’ve made your selections, click **Add to Year Plan**.

**TAKE NOTE:** meeting titles with numbers at the end are part of a series and you’ll want to add all of them to meet the requirements for the award.
Add Activities to Your Year Plan

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. 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 event details are clear and any special instructions are included here.

**COUNCIL ACTIVITY:** GSNorCal does not use this tab. You can view all GSNorCal's Activities and events on GSNorCal's website, under Events, click on Events Calendar or go to events.gsnorcal.org.
Tools for Planning Your Meeting

Set yourself—and your troop—up for success at each meeting! The **MEETING PLAN** tab has a robust collection of tools and information to help you plan an engaging meeting every time.

**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 check boxes to mark who's at the meeting—and if it's a meeting where you're finishing a badge or award, you can mark that too.

You can see the full picture of what a girl has earned on the **MY TROOP** tab, with the option to download the report.

**MEETING AIDS:** These documents and videos are the leg-up you need for each meeting! Some are geared toward the adult supporting the meeting and some are for girls completing the activities. You can find more meeting aids to add to your meeting by clicking **Add Meeting Aids** at the bottom of the section. You can find more information on how to use these resources in the Activity Plan.

If at any time you want to **replace** or **delete** an entire meeting, just use the respective links at the top of the meeting plan.

Don't forget, if at any time you want to download or print your year plan or meeting plan, look for these icons at the top of the page:
AGENDA: Here, you’ll find instructions and details for each activity, materials needed, time it takes to complete, and the 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!

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.
Resources

The **RESOURCES** tab provides several GSUSA and GSNorCal resources. The resources are grouped by program level and other helpful topics.

**TIP:** Be sure to click on the ▶ to see additional resources under each section.

Finances

The **FINANCES** tab provides an easy and secure way for troops to submit their Annual Troop Finance Report every year by May 15th. Here is what you’ll be able to do:

▶ Access instructions and links to helpful council financial documents in the **Troop Finance Report Resources**.

▶ Enter your troop’s income and expenses in detailed categories and view your troop’s finance summary (automatically calculated).

▶ Add detailed notes on your troop’s finances.

▶ Timestamp and auto save information, so troop leaders and troop treasurers can work on the financial report and see who last saved the information.

▶ Preview before submitting the troop financial report.

▶ Attach any documents you are required to send (April bank statement and supporting documentation).

▶ Once you submit your troop’s finance report, parents and troop support adults will have a read-only view of your income, expenses, and financial summary.

**TIP:** For instructions on how to submit your Annual Troop Finance Report in the VTK Finance Tab, visit the **Troop Finance Report** course in the Volunteer Learning Portal.

Questions?

Looking for more Volunteer Toolkit support? Check out the **GSNorCal VTK Webpage** where we have gathered all the resources you need to learn more about the badges and Journeys available and get the latest news, information, and resources. Contact Member Services at info@gsnorcal.org or call 800-447-4475, ext. 0 for additional assistance.