



## Financial Concern Process – FC Staff

Maumee Valley		Appleseed Ridge	
<b>FD-</b> Finance Dept.	Amber Whitaker	<b>FD-</b> Finance Dept.	Amber Whitaker
<b>BS</b> – Business Services	Rebecca Murray (VRC)	<b>BS</b> – Business Services	Maggie Slovak
<b>VHRM/ADM</b> – Volunteer Human Resources Manager	Lin Okuley	<b>DRS/VHRM</b> – Volunteer Human Resources Manager	Annette Swisher
<b>FTM</b> - Field Team Manager	Jackie Harding	<b>FTM</b> - Field Team Manager	Debi Mullins
<b>Staff contact names on letters</b>	<b>PDP</b> – Deb McLaren <b>TR</b> – Jennifer Greene	<b>Staff contact names on letters</b>	<b>PDP</b> – Jan Goedde <b>TR</b> – Amy Orwick
<b>PSM</b> – Product Sales Manager	Jennifer Greene	<b>PSM</b> – Product Sales Manager	Amy Orwick
<b>MES</b> – Membership Extension Specialist	See Regional Staff Lists	<b>MES</b> – Membership Extension Specialist	See Regional Staff Lists
<b>VS</b> – Volunteer Staff		<b>VS</b> – Volunteer Staff	
Buckeye Trails		Great Rivers	
<b>FD-</b> Finance Dept.	Amber Whitaker	<b>FD-</b> Finance Dept.	Amber Whitaker
<b>BS</b> – Business Services	Maggie Slovak	<b>BS</b> – Business Services	Edwina Scoby (VRS)
<b>DRS/VHRM</b> – Volunteer Human Resources Manager	Marcia Dowds	<b>VHRM</b> – Volunteer Human Resources Manager	Heather Young
<b>FTM</b> - Field Team Manager	Mary Robertson Cindy McCurdy	<b>FTM</b> - Field Team Manager	Erin Focke Leslie Rich Christina Mullis
<b>Staff contact names on letters</b>	<b>PDP</b> – Terri Bauman <b>TR</b> – Ashley Thoreen	<b>Staff contact names on letters</b>	<b>PDP</b> – Terri Bauman <b>TR</b> – Lila
<b>PSM</b> – Product Sales Manager	Ashley Thoreen	<b>PSM</b> – Product Sales Manager	Valerie Mott
<b>MES</b> – Membership Extension Specialist	See Regional Staff Lists	<b>MES</b> – Membership Extension Specialist	See Regional Staff Lists
<b>VS</b> – Volunteer Staff		<b>VS</b> – Volunteer Staff	

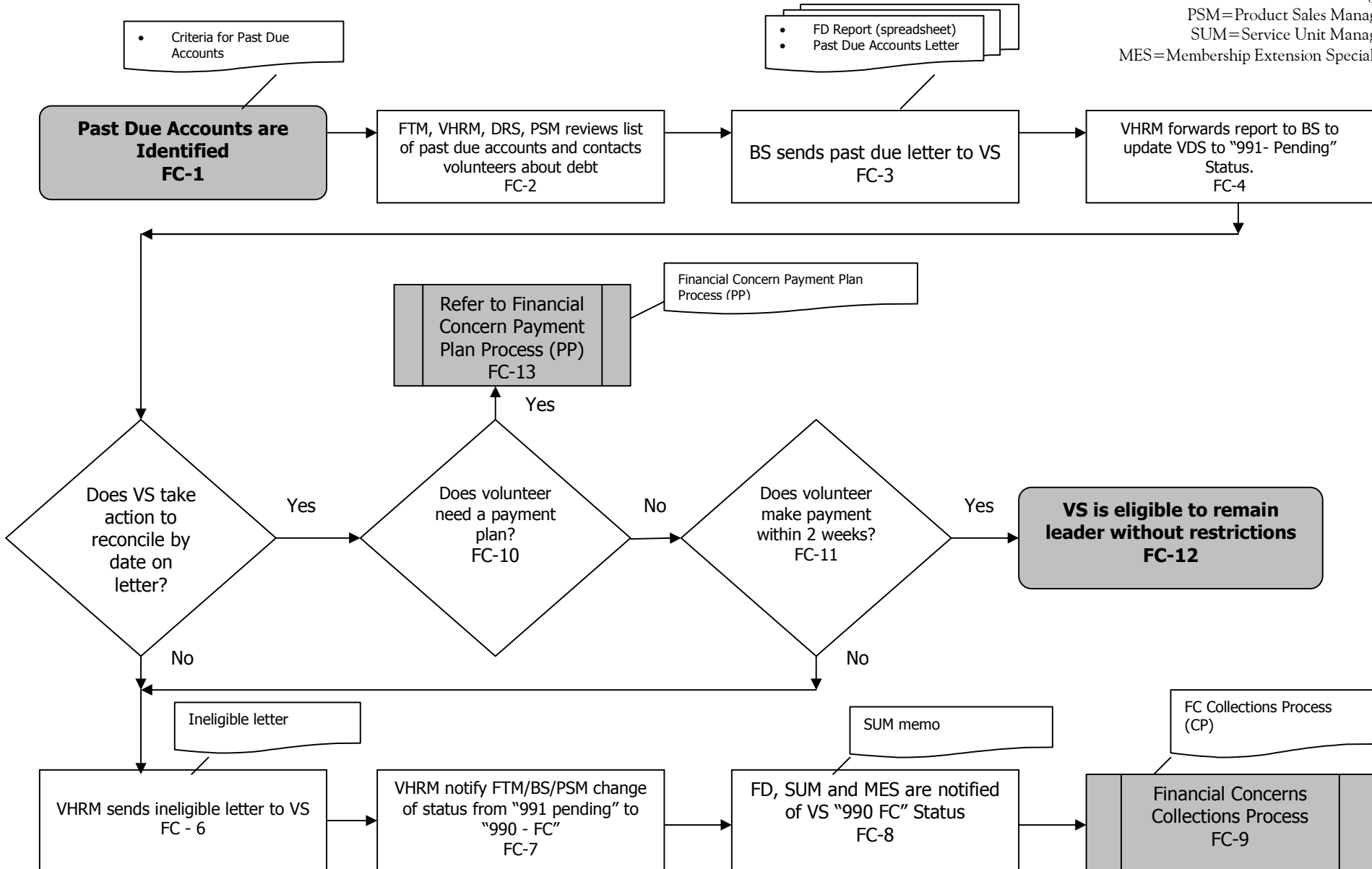
### Attachments:

1. Financial Concern – Financial Concern Process Map (FC)
2. Financial Concern – Financial Concern Process Instruction



Girl Scouts of Western Ohio  
[www.girlscoutsofwesternohio.org](http://www.girlscoutsofwesternohio.org)  
**Financial Concern Process – FC**


FD = Finance Dept.  
 BS = Business Services  
 VS = Volunteer Staff  
 VDB= Volunteer Data Base  
 VHRM=Volunteer Human Resources Manager  
 FTM = Field Team Manager  
 PSM=Product Sales Manager  
 SUM=Service Unit Manager  
 MES=Membership Extension Specialist







### Instructions: FC - Financial Concern Process Map

11/10

Steps in Process	Person Responsible	Task	Timeline	Documents & Addendums	Instructions
FC-1	FD	Past Due Accounts are identified and VHRM and FTM are notified.	Once Weekly	1. Criteria for Past Due Accounts #1 2. FD Report (1 ongoing report for all regions in L)	The finance dept. identifies volunteer's past due account based on criteria and post to L drive report and notifies VHRM and FTM.
FC-2	FTM, VHRM, DRS, PSM	FTM, VHRM, DRS, PSM reviews list of past due accounts (including PDP*) and contacts volunteers about debt.	1 week	Finance Report (spreadsheet)	FTM, VHRM, DRS, PSM will review list delinquent accounts. FTM, VHRM, DRS, PSM will determine who will make phone calls to volunteers regarding debt and offer solutions for resolution. *Past Due Parent (PDP) accounts will also be reviewed to identify high debts and if PDP holds an appointed position; appropriate follow-up must be made if PDP falls into either of these categories.
FC-3	BS	Letter is sent to VS using past due accounts identified in FD Report.	48 Hours	1. Finance Report 2. Past Due Account Letter #2 (Master letter has 6 letters) <ul style="list-style-type: none"> <li>Return check</li> <li>PDP – FPS/Cookies</li> <li>Troop outstanding balance – FPS/Cookies</li> <li>Outstanding balance for event or library materials</li> </ul>	The BS sends a past due account letter to the volunteer regarding an insufficient funds check or an outstanding balance.
FC-4	VHRM	VHRM forwards report to BS to update VS to "991 - Pending" Status in VDB.	48 hours	1. Finance Report 2. "991 Pending" FC Level #3	The VHRM notifies BS of position code change. BS makes update in VDB - "991 Pending."
FC-5 <b>Decision</b> 	FD	Does VS take action to reconcile account within 2 weeks?	2 weeks from date of notification letter		The volunteer is provided 2 weeks to settle his/her account.

Steps in Process	Person Responsible	Task	Timeline	Documents & Addendums	Instructions
FC-6 <b>No</b>	VHRM	VHRM sends ineligible letter to VS.	2 weeks from date of notification letter	Ineligible letter #4	VHRM sends volunteer an ineligible letter due to past due account.
FC-7	VHRM	VHRM notifies FTM/BS, PSM change of status from "991 Pending FC" to "990 - FC".	48 hours	1. FD Report 2. VDB	VHRM provides FTM/PSM with "ineligible to hold an appointed volunteer position" report including vol. product sales manager. Provide report to BS for change of status from "991 - Pending" to "990 - FC".
FC-8	VHRM	Notify finance department and service unit manager of VS "990 - FC" status.	48 hours	1. FD Report 2. SUM Ineligible memo	Update FD report and send memo to SUM and membership extension specialist.
<b>FC-9 Collections Process END</b>	FD	FD sends VS account to collections	48 Hours	1. Collections Process Map 2. FD Report	FD enters VS into Northstar for collections. VHRM notifies FTM.
FC-10 <b>YES</b> from  FC-5 Decision	VHRM	Does the volunteer need a payment plan?	Within 2 weeks of the past due account letter #2 sent	Payment Plan Process Map	VHRM refers to Payment Plan Process Maps and Instructions
<b>FC-13 YES Financial Concern Payment Plan Process END</b>	VHRM	VS agrees to enter into a payment plan to pay debt in full by specified timeline.	Within 2 weeks of the past due account letter #2 sent	1. Payment Plan Process Map 2. Payment Plan Options	VHRM discusses options with volunteer – VHRM has discretion to offer PP #2, but this is not the preferred option.
FC-11 <b>NO</b> from FC-10  Decision		Does volunteer make payment within two weeks?		FD Report	
<b>FC-12 Yes END</b>	FD	VS is eligible to remain leader without restrictions- "991-Pending Status" is removed in VDB.	Two Weeks	1. FD Report 2. VDB	FD updates FD report that payment has been made. BS removes 991-Pending Status in VDB.
<b>FC-6 NO</b>	VHRM	Repeat steps FC-6 – FC-9.	48 Hours	1. Ineligible letter #4	Volunteer has neglected to pay debt and steps FC-6 through FC-9 should be followed.

Steps in Process	Person Responsible	Task	Timeline	Documents & Addendums	Instructions
<b>FC-9</b> <b>Collections</b> <b>Process</b> <b>END</b>	FD	FD sends VS account to collections.	48 Hours	1. Collections Process Map 2. FD Report	FD enters VS into Northstar for collections. VHRM notifies FTM.

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