



Girl Scouts San Diego

Service Unit Team

Looker and Excel Guide

How-To Make Good Use of Service Unit Reports



Contents

Introduction.....	2
Confidentiality Declaration.....	4
A Note on Confidentiality.....	5
The Four Basic Looker Dashboards.....	5
Navigating the Looker HOME Page	6
A. Full Roster.....	7
Full Roster webpage filters.....	7
Full Roster: Sort and Filter the Data.....	9
B. Membership Analysis	12
Membership Analysis webpage filters.....	12
C. New in the Last Two Weeks.....	13
New in the Last Two Weeks webpage filters	13
D. Troop Details.....	14
Troop Details webpage filters.....	14
Troop Details: Sort the Data.....	15

Introduction

Looker is an online tool that provides current (within one business day) membership information for Girl Scout volunteers to provide the best possible service and support to our members world-wide. As a volunteer supporting local Girl Scout troops, events, or functions, you've been provided access to Looker as a means to deliver this support and ensure girls fulfill our mission. Thanks for respecting the sensitivity of the information by not sharing your log-in information or downloading full reports and sharing them with others without local council authorization.

Looker enables service unit teams to ensure local volunteers and girl participants have current memberships and provides detailed membership information to inform planning and participation in local events or trainings.

Definition of Terms	
Service Unit	A portion of a council's geographic area or group of troops/groups in that area. Also can be known as neighborhood, community, village, or area.
Administrative Volunteer	A volunteer who oversees a function or specific area of council operations (i.e. service unit team members).
Troop	A group of girls with adult leadership engaging in the Girl Scout Leadership Experience.
Looker	Online tool for Girl Scout Council staff and volunteers to access current membership data & reports.
Girl Scout Membership Year	October 1-September 30
Personally Identifiable Information (personal data)	The name, address, email address, date of birth, or other unique information relevant to a member or potential member. Treat this with respect for others' privacy.
Approved Volunteer	A member who has passed the designated screening (background, credit, interview or, other) for a specific Girl Scout volunteer role.



Call out: Looker is available to volunteers approved by Girl Scouts San Diego. Volunteers with access to Looker have:

- received training
- completed an approved background check
- signed a non-disclosure agreement

Do not share log-in information or Looker access with any volunteer who has not met these criteria. Please contact your service unit support specialist with any questions about this topic.



Confidentiality Agreement Girl Scouts San Diego

This confidentiality agreement should be signed by anyone accessing personal and confidential information within 'Looker' and applicable Girl Scout data-stores, where no equivalent agreement is in enforcement.

By signing this statement, I am indicating that I understand my responsibilities to maintain confidentiality and agree to the following:

1. I will access data only for the agreed purpose for which I am authorized explicitly. On no occasion will I use this data, including personal or confidential information, for my personal interest or advantage, or for any other business purposes.
2. I will maintain the privacy and confidentiality of all accessible data and understand that unauthorized disclosure of personal/confidential data is an invasion of privacy and may result in my volunteering role with Girl Scouts San Diego being terminated with immediate effect, plus civil and/or criminal actions against me.
3. I understand that where I have been given access to confidential information I am under a duty of confidence and would be liable under common law for any inappropriate breach of confidence in terms of disclosure to third parties and also for invasion of privacy if I were to access more information than that for which I have been given approval or for which consent is in place.
4. I will not disclose confidential or personal data or information to anyone other than those to whom I am authorized to do so.
5. All personal or confidential information will be kept secure while in my custody and no copies (downloads, screen captures/recordings, etc.) or notes containing personal identifiable information will be retained by me on completion of the agreed duties.
6. I understand that my access and activity within Looker and applicable Girl Scout data-stores will be logged and may be audited by Girl Scouts San Diego or GSUSA.
7. I agree to notify Girl Scouts San Diego immediately should I become aware of an actual breach of confidentiality or a situation which could potentially result in a breach, whether this be on my part or on the part of another person.
8. If in doubt about any aspect of handling confidential or personal information, I will check with the assigned Girl Scouts San Diego staff member.
9. Should my work in relation to the agreed duties discontinue for any reason, I understand that I will continue to be bound by this signed Confidentiality Agreement.



Confidentiality Agreement Girl Scouts San Diego

Confidentiality Declaration

To be completed by the individual:

I have read and understood the conditions and undertake to comply with them when accessing personal and confidential information.

Signature: _____ Date: ____/____/____

Name: _____

To be completed by Girl Scouts San Diego Staff:

Signature: _____ Date: ____/____/____

Name: _____

Title: _____

A copy of this signed sheet should be kept by the individual and the original saved on file by Girl Scouts San Diego.

A Note on Confidentiality

As service unit team members, you are the keepers of confidential information. Be diligent in complying with your position responsibilities.

So, what can you share with other team members?

Adult volunteer’s information only – Adult Volunteer’s name, email address, phone number, troop number, grade level, and number of girls in the troop. Adult volunteers understand that their email addresses will be shared for Girl Scout email information only.

Girl and family contact information should only be shared with troop leaders.

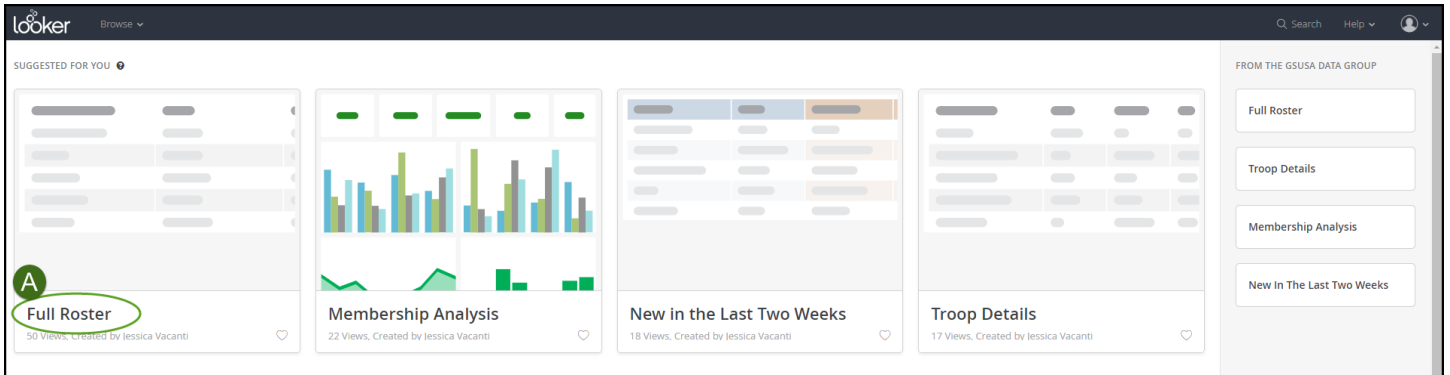
The Four Basic Looker Dashboards

Reports	Can be useful for:
Full Roster	<ul style="list-style-type: none"> organizing information about service unit membership identifying troops that are not meeting troop membership guidelines <ul style="list-style-type: none"> (i.e. Do troops have two background checked or unrelated adults in the troop leader and/or assistant leader role?) creating contact lists for specific service unit projects or events monitoring membership registration and renewals looking for trends in membership participation (i.e. schools, grade levels, troop adult roles, etc.)
Membership Analysis	<ul style="list-style-type: none"> tracking membership renewal by the numbers year over year looking for trends in membership types, troop adult roles, of girls’ grade levels sharing general service unit membership information with other volunteers without sharing the personal information of troops or Girl Scout members
New in the Last Two Weeks	<ul style="list-style-type: none"> identifying the volunteers who have recently accepted or moved into a new position <ul style="list-style-type: none"> (When a volunteer changes positions, this adjustment is shown on the New in the Last Two Weeks report.) confirming the contact information of new troop leaders to assist in new leader outreach looking for new troops that recently launched, or troops that have added new members
Troop Details	<ul style="list-style-type: none"> identifying the troops that are open or closed on the Opportunity Catalog gathering basic troop information at a glance confirming troop meeting information with troop leaders and assistant leaders, then sending updates to customercare@sdgirlscouts.org

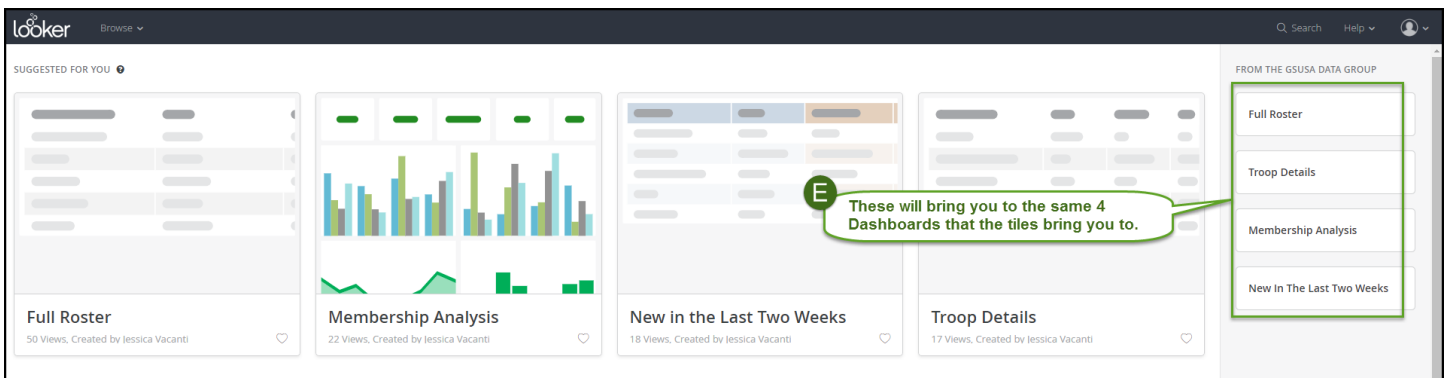
Navigating the Looker HOME Page

Always click on the top left hand side of any screen to return to Looker's HOME page.

HOME page:



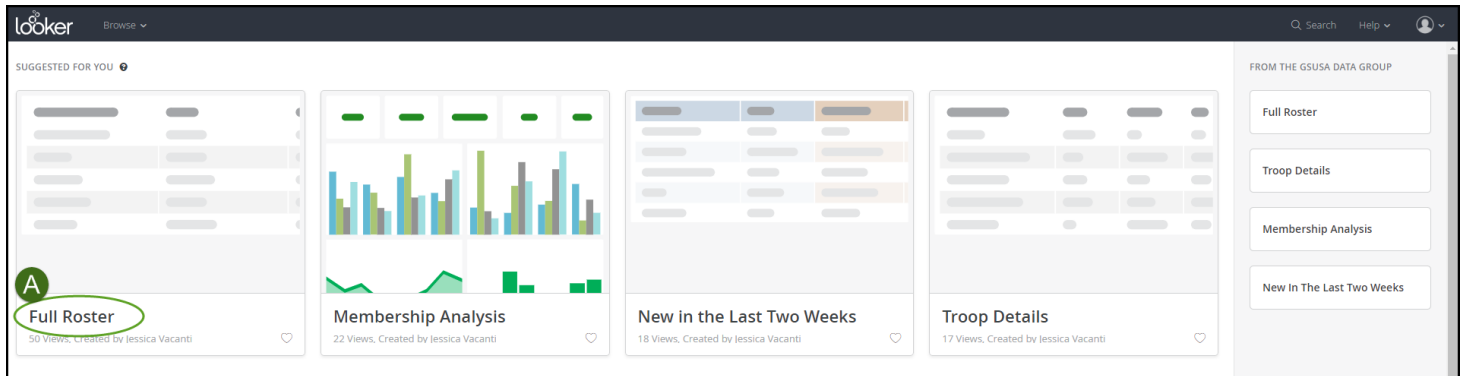
Sidebar of the HOME page. Each section will bring you to the same 4 Dashboards that the tiles will bring you to.



A. Full Roster

The Service Unit Full Roster offers the complete information of every member of the service unit. This report may be most useful for:

- organizing information about service unit membership
- identifying troops that are not meeting troop membership guidelines
 - (i.e. Do troops have two background checked or unrelated adults in the troop leader and/or assistant leader role?)
- creating contact lists for specific service unit projects or events
- monitoring membership registration and renewals
- looking for trends in membership participation (i.e. schools, grade levels, troop adult roles, etc.)

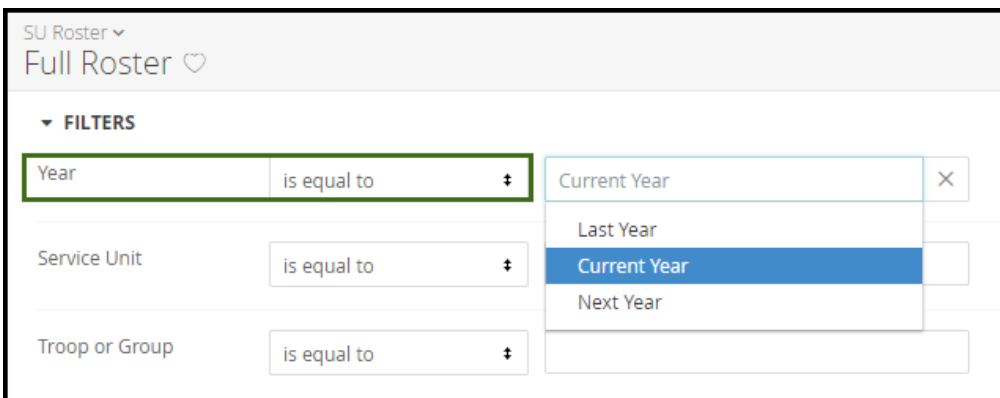


Full Roster (based on year in filter)

Service Unit	Troop/Group	Membership Type	Position	First Name	Last Name	Email	Does member allow email?	Phone Number	Address Line 1	City	State Name (Abbr.)	Zip Code	Name (School)	Girl Grade	Position Active Date	Status	Expiration Date	Preferred Contact First Name	Preferred Contact Last Name	Does member allow photograph?
1 SU209	Troop01640	Adult Membership	Troop Chaperone/Driver	[REDACTED]	[REDACTED]	[REDACTED]	Y	[REDACTED]	[REDACTED]	Chapel Hill	NC	27516	Not Applicable	Adult	2018-08-30	Eligible	2022-08-29	[REDACTED]	[REDACTED]	Y
2 SU209	Troop00693	Adult Membership	Troop Co-Leader	[REDACTED]	[REDACTED]	[REDACTED]	Y	[REDACTED]	[REDACTED]	Rougemont	NC	27572	Not Applicable	Adult	2018-08-28	Eligible	2022-07-28	[REDACTED]	[REDACTED]	Y
3 SU209	Troop01892	Adult Membership	Troop Chaperone/Driver	[REDACTED]	[REDACTED]	[REDACTED]	Y	[REDACTED]	[REDACTED]	Durham	NC	27705	Not Applicable	Adult	2018-08-28	Eligible	2020-09-07	[REDACTED]	[REDACTED]	N
4 SU209	Troop01892	Girl Membership	GIRL	[REDACTED]	[REDACTED]	[REDACTED]	Y	[REDACTED]	[REDACTED]	Durham	NC	27705	School Not Found	Grade 02	2018-08-28	NOT APPLICABLE	[REDACTED]	[REDACTED]	[REDACTED]	Y

Full Roster webpage filters

1. Filter on year (Last Year, Current Year, or Next Year)



2. Filter on service unit (one or more depending on roles held)

SU Roster ▾
Full Roster ♥

▼ FILTERS

Year is equal to ▾ Current Year ▾ ×

Service Unit is equal to ▾ SU208 × SU209 × SU215 × |

Troop or Group is equal to ▾

3. Filter on troop or group

SU Roster ▾
Full Roster ♥

▼ FILTERS

Year is equal to ▾ Current Year ▾ ×

Service Unit is equal to ▾ SU208 × SU209 × SU215 ×

Troop or Group is equal to ▾

- Troop00517
- Troop00572
- Troop00608
- Troop00643
- Troop00693
- Troop00700
- Troop00711
- Troop00714

Service Unit	Troop/Group	Membership Type
1 SU209	Troop01640	Adult Membership
2 SU209	Troop00693	Adult

4. Click RUN to see filters get applied

SU Roster ▾
Full Roster ♥

Just now - America - New York Run

▼ FILTERS

Year is equal to ▾ Current Year ▾ ×

Service Unit is equal to ▾ SU208 × SU209 × SU215 × +

Troop or Group is equal to ▾ Troop01112 ▾ +

After selecting Filter values, Click Run.

Full Roster (based on year in filter)

Service Unit	Troop/Group	Membership Type	Position	First Name	Last Name	Email	Does member allow email?	Phone Number	Address Line 1	City	State Name (Abbr.)	Zip Code	Name (School)	Girl Grade	Position Active Date	Status	Expiration Date	Preferred Contact First Name	Preferred Contact Last Name	Does member allow photograph?
SU209	Troop01112	Adult Membership	Camp Certified Adult	████	████	████████████████	Y	████	████████████████	Durham	NC	27713	Not Applicable	Adult	2018-08-08	Eligible	2021-03-09	Jennifer	Hemmerlein	Y
SU209	Troop01112	Girl Membership	GIRL	████	████	████████████████	Y	████	████████████████	Durham	NC	27713	████	Grade 01	2017-11-07	NOT APPLICABLE	0	Sarah	Ray	Y

Full Roster: Sort and Filter the Data

The Full Roster in this section has been simplified to protect volunteer information and for ease of demonstration.

1. Open the roster. At first, you will see a ton of information. Start by looking at the top row to see the categories the information is grouped under:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1		Service Unit/ Troop/Group	Membership Type	Position		First Name	Last Name	Email	Does member allow email?	Phone Number	Address Line 1	City	State Name (Abbr.)	Zip Code	Name (School)	Girl Grade
2	1	SUxxxx	Camp Membership	Girl Membership	GIRL				Y			Lakeside	CA	92040	School Not Found	Grade 05
3	2	SUxxxx	Troop02254	Girl Membership	GIRL				Y			San Diego	CA	92120	Elementary School C	Grade 05
4	3	SUxxxx	Independent Member	Girl Membership	GIRL				Y			Lakeside	CA	92040	High School B	Grade 10
5	4	SUxxxx	Troop08751	Adult Membership	4Her Troop Helper				Y			Poway	CA	92064	Not Applicable	Adult
6	5	SUxxxx	Troop02760	Girl Membership	GIRL				Y			San Diego	CA	92130	Home Schooled	0 Grade K
7	6	SUxxxx	Troop08751	Girl Membership	GIRL				Y			San Diego	CA	92128	Elementary School B	Grade 02

The Full Roster includes information regarding:

service unit, troop/group, membership type, position, name, contact information, school, and grade

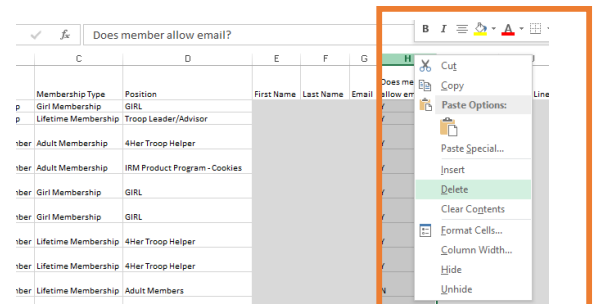
Two other types of information are offered to the far right (*not pictured*):

- background check information for adult volunteers
- photograph permissions



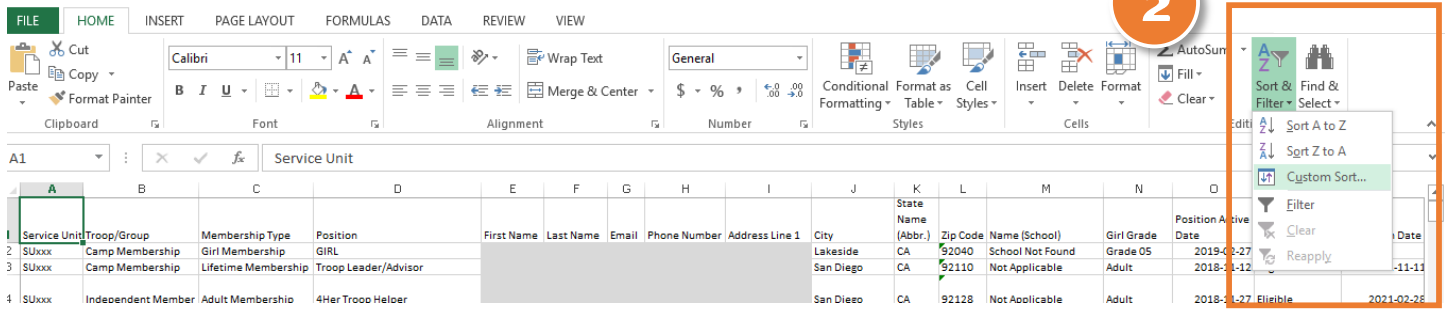
Call out: Volunteer background checks must be renewed every three years. Volunteers with expired background checks will also receive the link to renew their background check at the time they renew their membership for the next year.

You can also delete columns you do not find useful. Just “right click” at the top of the column and click “Delete.”

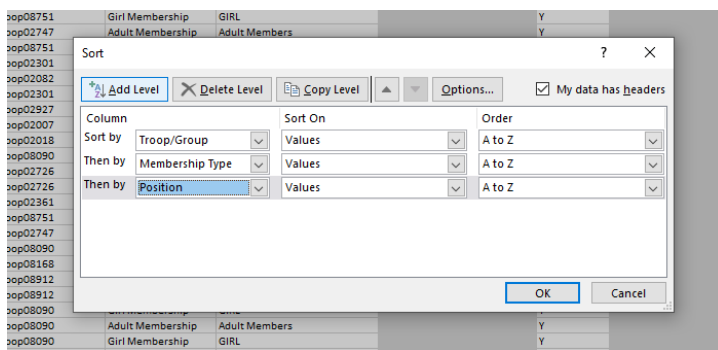


2. Sort the roster.

Begin by selecting “Custom Sort” from the HOME tab.



Add two levels to make three levels total and use the drop down menus to set the sort fields as shown. Then click “OK.”



Now, you can scroll through the roster to identify:

- independent members, camp members, or members “Seeking a Troop”
- service unit team members
- adult and girl members in each troop

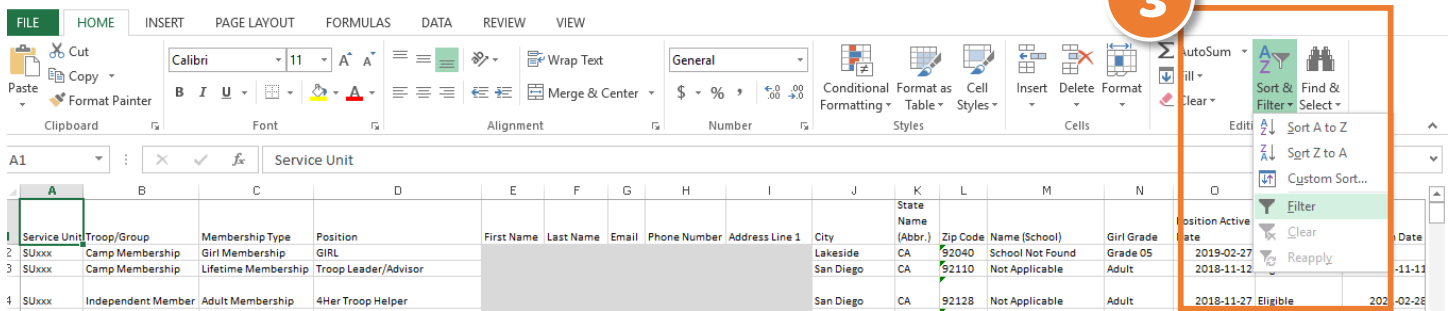
Row	Service Unit	Troop/Group	Membership Type	Position	City	State	Zip Code	Name (School)	Girl Grade	Position Active Date	Eligible
39	SUxxx	Independent Member	Lifetime		CA	92064	Not Applicable	Adult		1997-10-01	NOT APPLICABLE
40	SUxxx	Independent Member	Lifetime		CA	92128	Not Applicable	Adult		1995-10-01	NOT APPLICABLE
41	SUxxx	Independent Member	Lifetime		CA	92128	Not Applicable	Adult		1995-10-01	NOT APPLICABLE
42	SUxxx	SUxxx Campaign	Adult Membership	Membership Recenter - Highland	San Diego	92128	Not Applicable	Adult		2018-03-27	Eligible
43	SUxxx	SUxxx Campaign	Adult Membership	SU Activity Consultant	Poway	92064	Not Applicable	Adult		2018-09-26	Eligible
44	SUxxx	SUxxx Campaign	Adult Membership	SU Product Sales - Cookies	San Diego	92128	Not Applicable	Adult		2018-05-29	Eligible
45	SUxxx	SUxxx Campaign	Adult Membership	SU Product Sales - Cookies	San Diego	92128	Not Applicable	Adult		2018-05-29	Eligible
46	SUxxx	SUxxx Campaign	Adult Membership	SU Product Sales - Fall	San Diego	92128	Not Applicable	Adult		2017-09-06	Eligible
47	SUxxx	SUxxx Campaign	Adult Membership	SU Recognitions	San Diego	92128	Not Applicable	Adult		2018-10-01	NOT APPLICABLE
48	SUxxx	SUxxx Campaign	Adult Membership	SU Registrar	San Diego	92128	Not Applicable	Adult		2018-08-27	Eligible
49	SUxxx	SUxxx Campaign	Adult Membership	SU SHARE Coordinator	Poway	92064	Not Applicable	Adult		2018-08-22	Eligible
50	SUxxx	SUxxx Campaign	Adult Membership	SU Treasurer	San Diego	92128	Not Applicable	Adult		2018-05-29	Eligible
51	SUxxx	Troop02007	Adult Membership	4Her Troop Helper	San Diego	92128	Not Applicable	Adult		2019-01-31	Eligible
52	SUxxx	Troop02007	Adult Membership	4Her Troop Helper	San Diego	92128	Not Applicable	Adult		2018-12-11	Eligible
53	SUxxx	Troop02007	Adult Membership	4Her Troop Helper	San Diego	92128	Not Applicable	Adult		2017-12-18	Eligible
54	SUxxx	Troop02007	Adult Membership	4Her Troop Helper	San Diego	92128	Not Applicable	Adult		2017-10-24	Eligible
55	SUxxx	Troop02007	Adult Membership	Adult Members	San Diego	92128	Not Applicable	Adult		2018-08-16	Expired
56	SUxxx	Troop02007	Adult Membership	Adult Members	San Diego	92128	Not Applicable	Adult		2017-08-06	Eligible
57	SUxxx	Troop02007	Adult Membership	Troop Assistant Leader/Advisor	Poway	92064	Not Applicable	Adult		2017-08-31	Eligible
58	SUxxx	Troop02007	Adult Membership	Troop Cookie Manager	San Diego	92128	Not Applicable	Adult		2018-12-06	Eligible

Notice you can scroll through the roster and see Girl Scout members by troop/group.

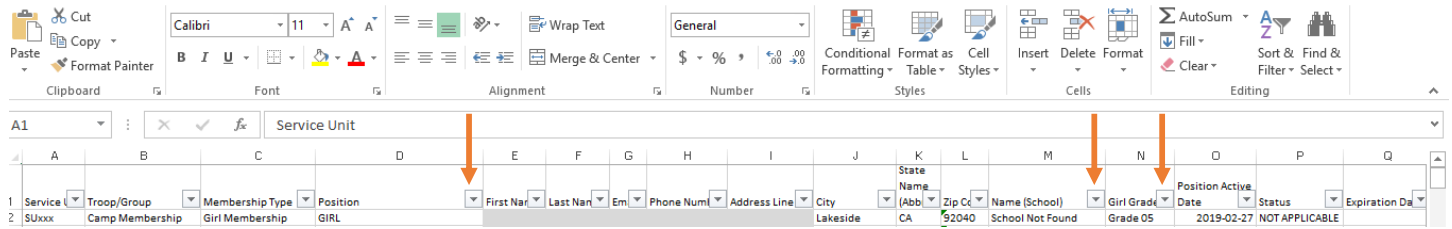
3. Filter the roster.

Now that the roster is sorted by troop, you can filter the roster to only show members of a designated category.

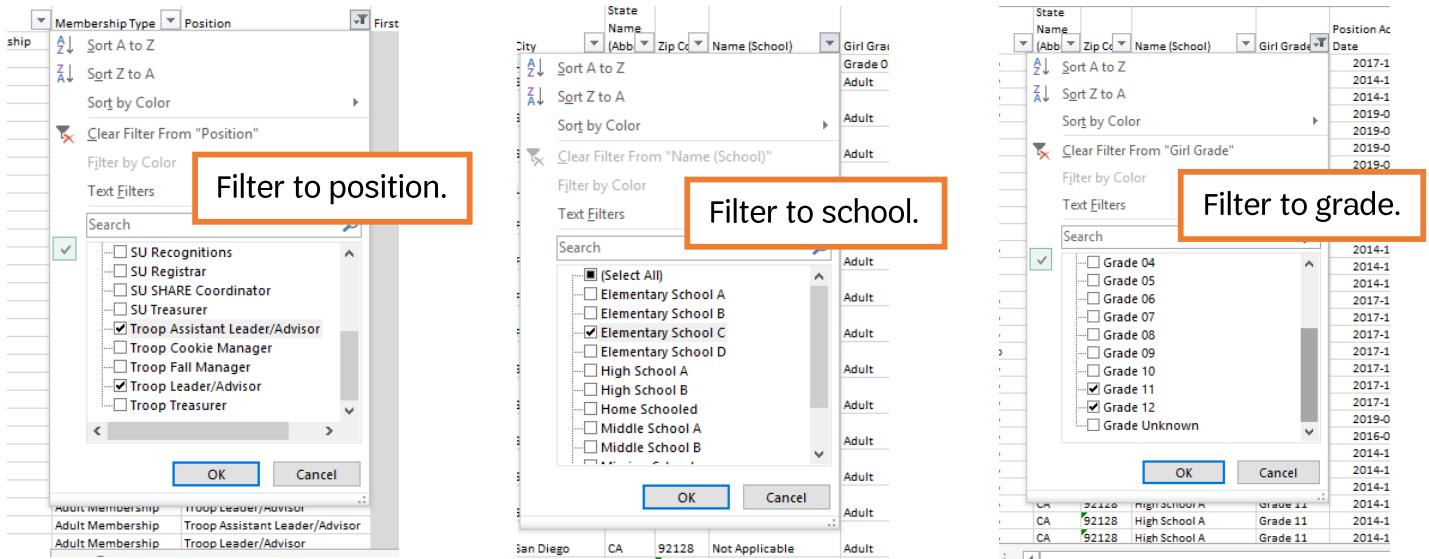
Begin by selecting “Filter” from the HOME tab.



Notice, drop down menus appear at the top of each column. You can open the drop down menu and select the categories that you wish to display. Common filters include:



- position (i.e. troop leader/assistant leader, TCM, troop treasurer, etc.)
- by school (i.e. see how many Girl Scouts attend each school in your community)
- grade level (i.e. all Girl Scouts in grade 5 or all Girl Scouts in grade 12)

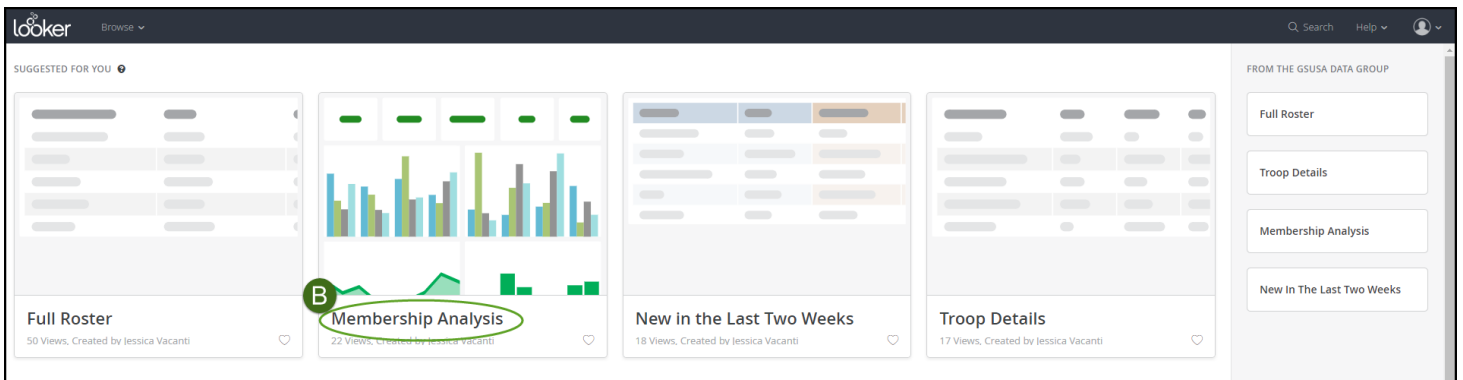


Call out: Grade 5 is a big year of transition for troops. It is important to connect with troops bridging from Juniors to Cadettes early and support their members as they decide next steps.

B. Membership Analysis

The Service Unit Membership Analysis offers visuals and charts that can help you make quick sense of the membership in your service unit. This report may be most useful for:

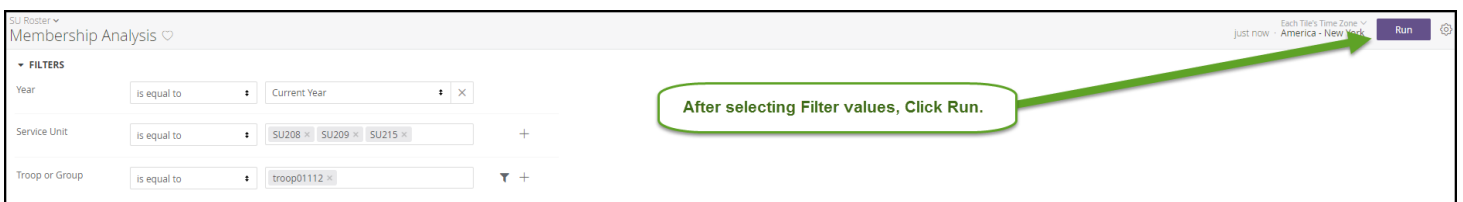
- tracking membership renewal by the numbers year over year
- looking for trends in membership types, troop adult roles, or girls' grade levels
- sharing general service unit membership information with other volunteers without sharing the personal information of troops or Girl Scout members



Membership Analysis webpage filters

Filters are the same as the filters on the Full Roster Dashboard:

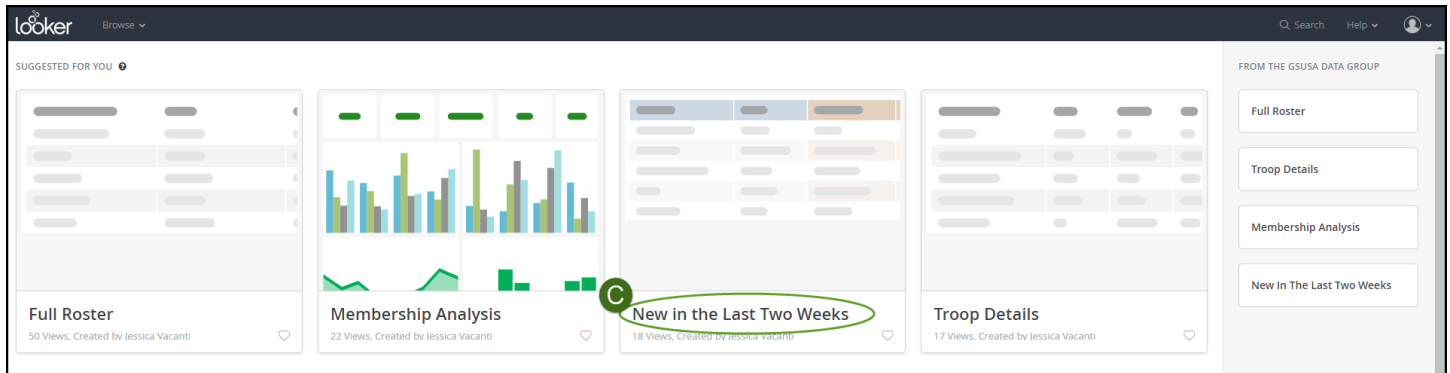
1. Filter on year (Last Year, Current Year, or Next Year)
2. Filter on service unit (one or more depending on roles held)
3. Filter on troop or group
4. Click RUN to see filters get applied



C. New in the Last Two Weeks

The New in the Last Two Weeks report offers a glimpse of the new members to the service unit. This report may be most useful for:

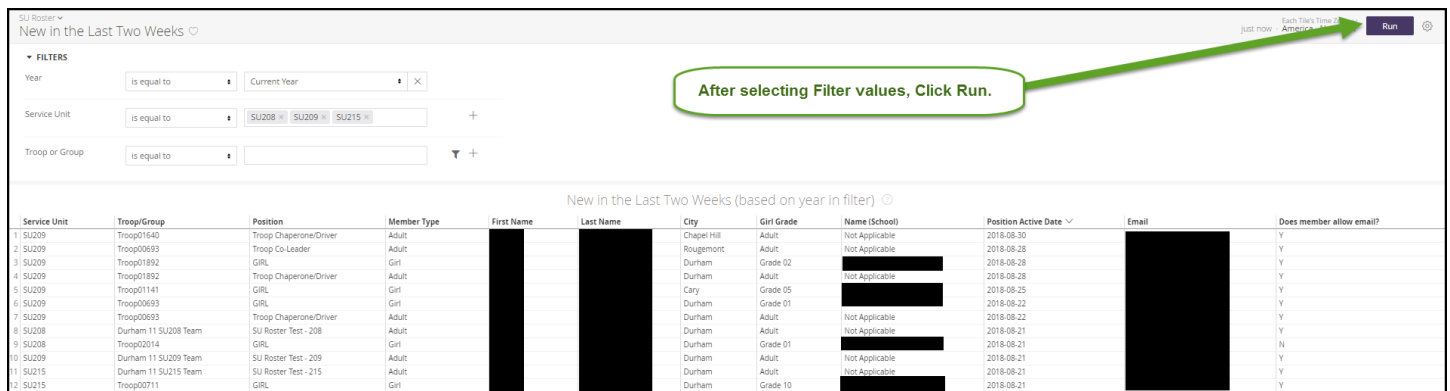
- identifying the volunteers who have recently accepted or moved into a new position
 - (When a volunteer changes positions, this adjustment is shown on the New in the Last Two Weeks report.)
- confirming the contact information of new troop leaders to assist in new leader outreach
- looking for new troops that recently launched, or troops that have added new members



New in the Last Two Weeks webpage filters

Filters are the same as the filters on the Full Roster Dashboard:

1. Filter on year (Last Year, Current Year, or Next Year)
2. Filter on service unit (one or more depending on roles held)
3. Filter on troop or group
4. Click RUN to see filters get applied



D. Troop Details

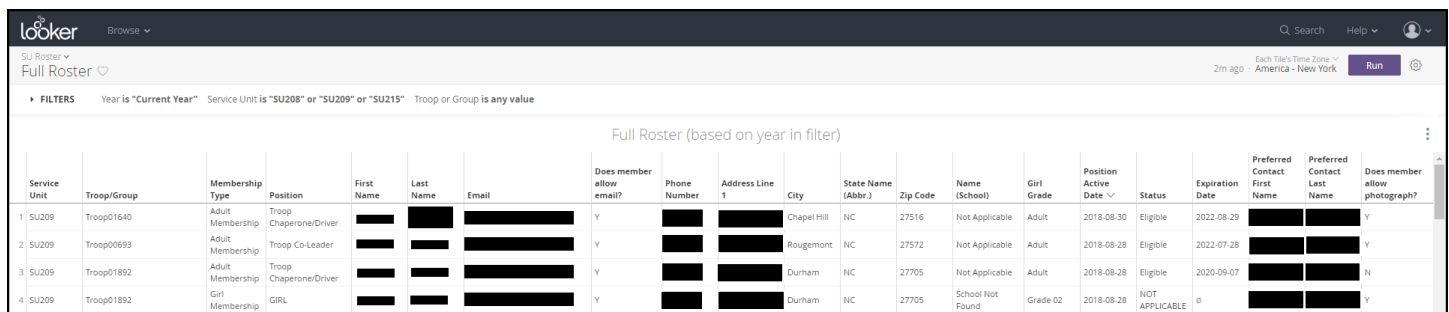
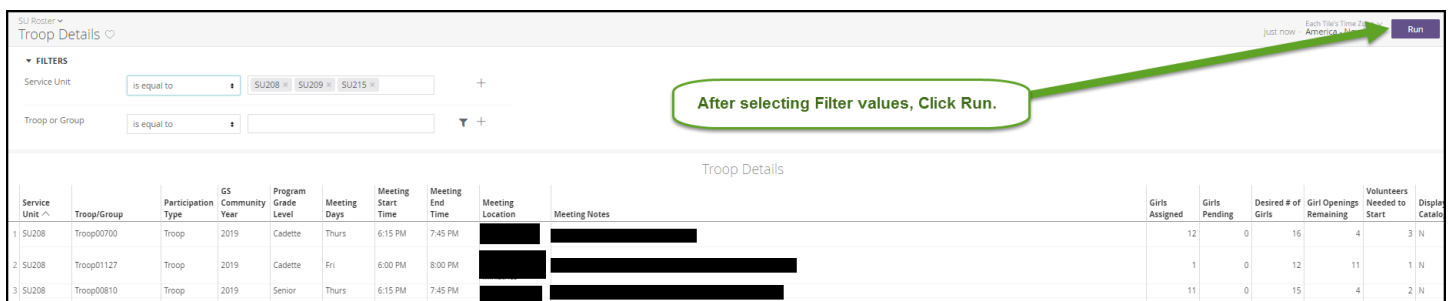
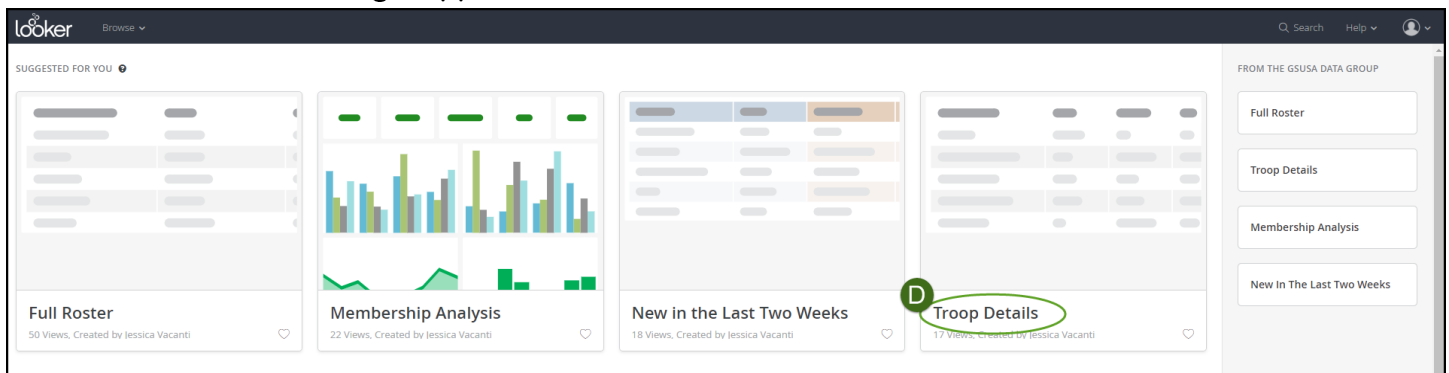
The Troop Details report offers a snapshot with the key information for every troop in the service unit. This report may be most useful for:

- identifying the troops that are open or closed on the Opportunity Catalog
- gathering basic troop information at a glance
- confirming troop meeting information with troop leaders and assistant leaders, then sending updates to customercare@sdgirlscouts.org

Troop Details webpage filters

Filters are the same as the filters on the Full Roster Dashboard:

1. Filter on service unit (one or more depending on roles held)
2. Filter on troop or group
3. Click RUN to see filters get applied



Troop Details: Sort the Data

The Troop Details report in this section has been simplified to protect volunteer information and for ease of demonstration.

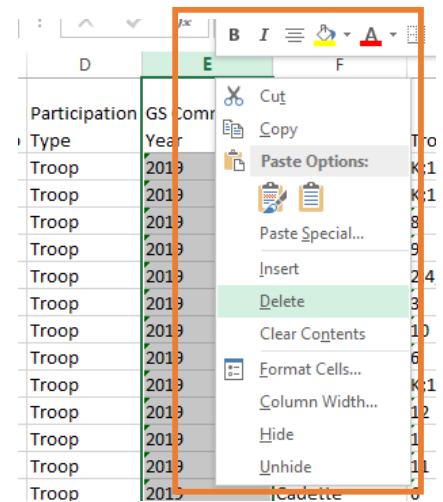
1. **Open the Report.** At first, you will see a ton of information. Start by looking at the top row to see the categories the information is grouped under:

Troop/Group	Participation Type	GS Community Year	Program Grade Level	Troop Grade	Meeting Frequency	Meeting Days	Meeting Start Time	Meeting End Time	Meeting Location	Meeting Notes	Girls Assigned	Girls Pending	Desired # of Girls	Openings Remaining	Display in Catalog?
op02005	Troop	2019	Daisy	K;1	Bi-weekly	Tue			meeting location in GSSD council notes	GSSD council notes	2	0	12	10	N
op02135	Troop	2019	Daisy	K;1	Bi-weekly	Mon	2:45 PM	4:00 PM	meeting location in GSSD council notes		12	0	12	0	N
op02192	Troop	2019	Cadette	8	Bi-weekly	Wed	2:00 PM	3:15 PM	meeting location in GSSD council notes		5	0	12	7	N

The report includes information regarding:

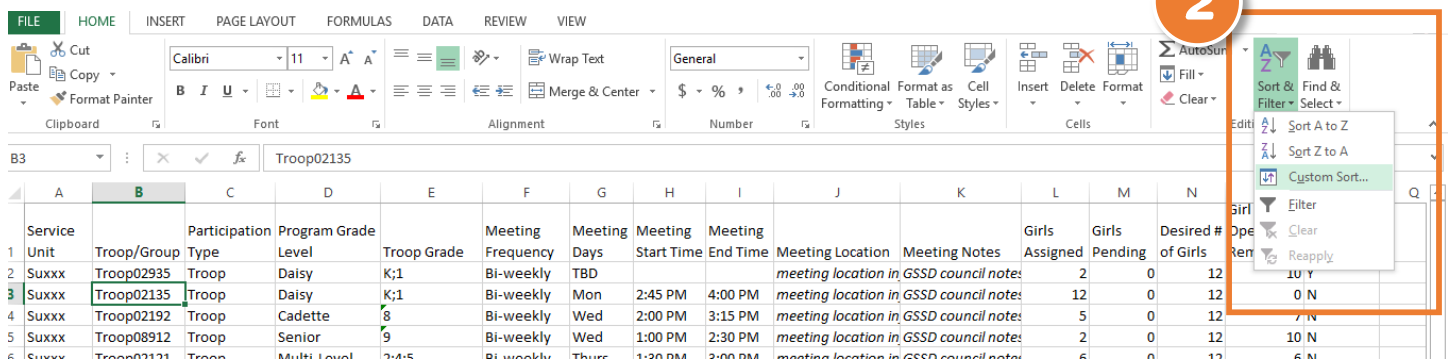
service unit, troop/group, participation type, program grade level, meeting information, girl membership totals, and whether the troop is displayed as open in the Opportunity Catalog

You can delete columns you do not find useful. Just “right click” at the top of the column and click “Delete.”



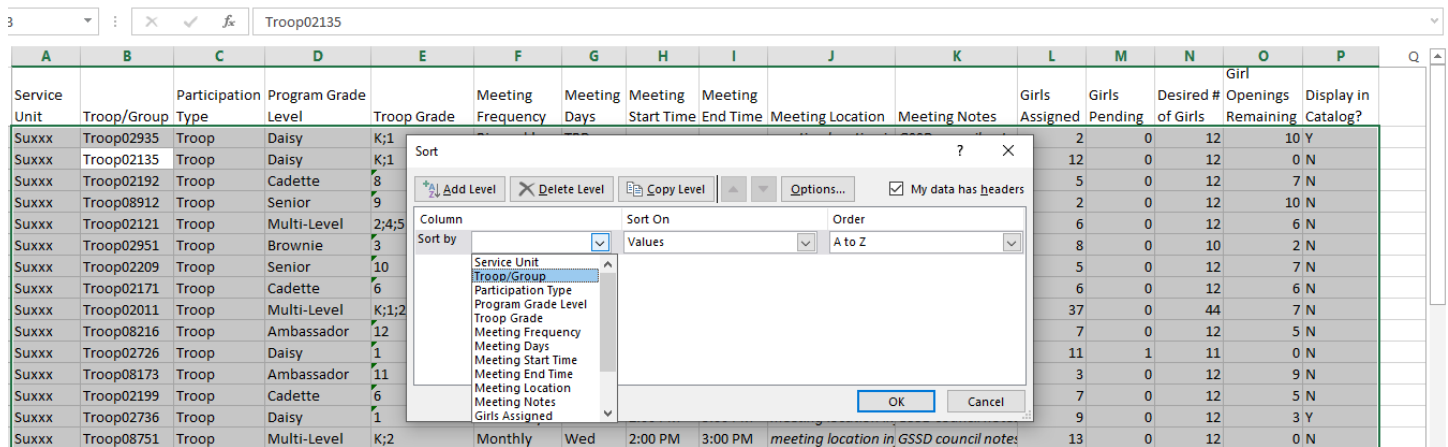
2. Sort the Report.

Begin by selecting “Custom Sort” from the HOME tab.



Once you select sort, you can sort the roster by each category. When you are selecting how to sort the roster, there are some things to consider:

- “Troop/Group” will organize the troops by number in chronological order
- “Program Grade Level” will group troops as Daisy, Brownie, Junior, etc.
- “Girls Assigned” will group troops by size
- “Display in the Catalog?” will group troops by “yes” or “no”



By sorting by “Program Grade Level,” we can see this service unit has one Brownie troop displayed as open in the Opportunity Catalog.

Service Unit	Troop/Group	Participation Type	Program Grade Level	Troop Grade	Meeting Frequency	Meeting Days	Meeting Start Time	Meeting End Time	Meeting Location	Meeting Notes	Girls Assigned	Girls Pending	Desired # of Girls	Openings Remaining	Display in Catalog?
Suxxx	Troop07777	Ambassador	11		Monthly	Fri	5:00 PM	8:00 PM	meeting location in GSSD council notes		4	0	12	8	N
Suxxx	Troop01234	Troop	Brownie	3	Monthly	Sun	1:00 PM	1:00 PM	meeting location in GSSD council notes		8	0	10	2	N
Suxxx	Troop05678	Troop	Brownie	2	Bi-weekly	Mon	3:45 PM	5:00 PM	meeting location in GSSD council notes		8	0	12	4	N
Suxxx	Troop09101	Troop	Brownie	3	Monthly	Sun	4:30 PM	5:30 PM	meeting location in GSSD council notes		6	0	8	2	N
Suxxx	Troop01213	Troop	Brownie	2	Monthly	Wed	1:40 PM	2:30 PM	meeting location in GSSD council notes		10	0	12	2	Y
Suxxx	Troop09999	Troop	Cadette	8	Bi-weekly	Wed	2:00 PM	3:15 PM	meeting location in GSSD council notes		5	0	12	7	N
Suxxx	Troop03333	Troop	Cadette	6	Monthly	Mon			meeting location in GSSD council notes		6	0	12	6	N

The Troop Details in this section has been simplified or edited to protect volunteer information and for ease of demonstration.

GA:GA

MB-1052 3/15/19