



100 YEARS OF SCOUTING

Celebrating the Adventure ★ Continuing the Journey

BSA: Council “Steps to Success” for transitioning to Jitasa accounting services

Step 1: For a current or anticipated vacancy in the accounting specialist position, consider the 8-to-12 months necessary to recruit, hire and train a new employee: Non-profit/Fund Accounting, BSA procedures, Council-specific procedures, ScoutNET and/or PeopleSoft, audit-prep processes, off-site visits with national staff or other local council office, reporting and month-closing, etc. (Note: National Office does not provide new hire training.)

Step 2: Meet with council office management team to assess office functions and determine if/how any non-accounting tasks can be absorbed by remaining staff.

Step 3: Contact Jitasa to set-up a teleconference for an overview of the Jitasa service model and accounting processes. (Visit the Jitasa web-site to view the video providing an overview of the organization.)

Step 4: Present initial information to the Key 3 team to establish awareness/buy-in from top local leadership. (If possible and the timing allows, plan to meet the Jitasa leadership team at the National Meeting to put names to faces.)

Step 5: Conduct second teleconference with Jitasa to present to Council President, Council Treasurer and Council Scout Executive to address and answer all the questions for volunteers.

Step 6: Communicate process with Board Officer’s and Audit Committee Members (including CPA firm) via email, forwarding the Jitasa “BSA Qualifications” document, to provide an opportunity for additional questions.

Step 7: Inform and educate all council office staff/employees on the benefits of the transition to Jitasa.

Step 8: Sign contract and begin on-boarding with Jitasa team. Jitasa is trained on all BSA procedures, including People Soft, allowing for faster ramp up than training a new accounting specialist. (The typical on-boarding and ramp-up period is approximately 3 months.)

Step 9: Host an on-site visit by Jitasa Specialist 1 to 1½ months after start of contract. (VERY IMPORTANT.)

Step 10: Final Step—**Recognize that the Council has now made a transformational business decision that will have a long term positive impact in the financial & accounting processes for many years to come in your local council operations.**

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