

This document is a guide on the steps you may want to take when a young member is thinking about or is about to move to the next section (e.g. Rainbows to Brownies).

These relate to the following instructions in GO:

- Transfer a young member to another unit (use for step 1 and 2)
- Update a new young member enquiry (use for step 3)
- Add enquiry to waiting list (use for step 3B)
- Refer enquiry to another unit (use for step 3C)
- Remove a young member who has left a unit (use for step 4)
- Add an enquiry to a unit (use for step 5)

Steps 1, 2 and 3 are for leaders who are transferring a girl from their section.

Steps 4 and 5 are for leaders who are getting a girl from the section below.

Step 1: find out where the young member wants to go

When a young member is thinking about or ready to move to the next section you should talk to the young member and her parent/carer to decide which unit she'd like to go to. You may want to stress that moving sections doesn't happen automatically and they may have to go onto a waiting list.

If they do want to move to the next section, you can use the transfer map to see and suggest to the parent/guardian the nearest units. The parent/carer can then let you know which unit they would prefer their child to be transferred to.

Note: do not complete the transfer process unless you know which unit the young member would prefer to go to.

Step 2: transfer young member to unit

When the parent/guardian has informed you which unit they would like their child to join, you can transfer the girl to the chosen unit. This will allow the chosen unit to process the enquiry and add the child to their waiting list. Contacting the potential new unit leader personally or through GO before doing this can help smooth this process and remove any miscommunication.

Note: after transferring the young member to their new unit do not remove the young member until they have left their unit (see step 5).



Instructions

1) In unit's page on GO, select [Young Member Roles](#).

Unit Details [Young Member Enquiries](#) **Young Member Roles** [Volunteer Roles](#) [Individuals](#) [Events](#) [Permits](#) [Audit](#) [Reports](#) [Shops](#)

2) Click on the [Actions](#) arrow for the relevant young member and select [Transfer](#).

3) The Transfer Map and list of units will appear. If units have no spaces a red **x** will appear. This doesn't necessarily mean there are no spaces though and it's worth contacting the potential new leader to check.

4) Select [Choose](#) and then [Transfer](#) at the bottom of the page.

If you need to contact a unit you can press, [Contact Unit](#) button to send an internal message through GO.

Step 3: update enquiry

Leaders can see young member enquiries in Young Member Enquiries (found in the unit's page).

Unit Details **Young Member Enquiries** [Young Member Roles](#) [Volunteer Roles](#) [Individuals](#) [Brownie Programme](#) [Permits](#) [Events](#) [Audit](#)
[Reports](#) [Grants](#) [Shops](#) [Current Offer](#)

On the left-hand side (under [In This Section](#)) you will find the following:

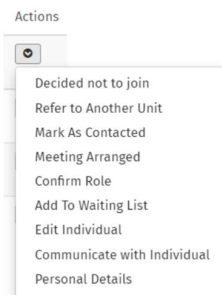
All Young Member Enquiries	All enquiries for your unit, members transferring and girls brand new to guiding.
New Enquiries	Enquiries that require action
Young Member Contacted	Enquiries that have been contacted but further action hasn't been taken.
Waiting List	Enquiries that are currently on your waiting list.
Meeting Arranged	Enquiries for that have arranged a first unit meeting.
Enquirer Individuals	New enquiries at any stage of the process with a contact email address to quickly contact.

Step 3A: contact new enquiry

After receiving a new enquiry, you should contact parents/carers – update GO when this has happened. When contacting the parent/carer, you may want to mention: where, when & time of meeting; cost/subscription; when a space is expected.

When you have contacted the parent/carer make sure you record the enquiry as contacted, you don't need to have received a reply at this stage.

Add comments to the notes section for the individual at regular intervals. Include things such as how you have tried to contact them, potential start dates or other comments that others may find useful if they need to check the status of an enquiry.



Instructions

- 1) Go to [Young Member Enquiries](#) (found in Unit's page) and select [New Enquiries](#).
- 2) Click on the [Actions](#) drop down menu and select [Mark as Contacted](#).
- 3) Complete the [Contacted Date](#) field (date of letter or email sent to parents/carers) and complete the [Potential Start Date](#) field (if known).

Step 3B: add enquiry to waiting list

When you have received confirmation from the parent/carer that their child would like to join your unit, you can add them to your unit's waiting list.

Instructions

- 1) Go to [Young Member Enquiries](#) (found in Unit's page) and select [All Young Member Enquiries](#).
- 2) Click on the [Actions](#) drop down menu and select [Add to Waiting List](#).

Step 3C: refer to another unit

If you need to refer an enquiry to another unit (e.g. a very long waiting list) you may have the option to transfer the girl to another unit. If you do decide to do this talk to the parent/carer before you do anything to see if they would like you to do this and give options of other units. Parents/carers may also ask you to transfer their child to another unit (e.g. friends at a different unit).

Instructions

- 1) Go to [Young Member Enquiries](#) (found in Unit's page) and select [All Young Member Enquiries](#).
- 2) Click on the [Actions](#) drop down menu and select [Refer to Another Unit](#).
- 3) In the [Transfer Map](#) change the postcode (if needed) to locate the required unit.
- 4) If the unit has space for a young member, select [Choose](#) and then [Transfer](#) at the bottom of the page.

Step 4: remove young member from unit

When a girl is no longer a member of your unit you will need to remove them from your unit within GO. This needs to be done before they can be added to their new unit but by keeping the dates as accurate as possible no young member loses anniversary award time.

Instructions:

- 1) Go to [Young Member Enquiries](#) (found in Unit's page) and select the action arrow for the young member who has left.
- 2) Select [End Role](#), enter date of their last meeting and [Submit](#).

Step 5: add enquiry to unit

When a new enquiry has joined the unit, you will need to add them to your unit within GO.

Note: this can only happen if the previous unit has removed the girl from their unit (step 4)

Instructions:

- 1) Go to [Young Member Enquiries](#) (found in Unit's page) and select [Waiting List](#).
- 2) Find the girl in the table, select the actions arrow and [Confirm Role](#).
- 3) Add the Start Date and Update

