ONLINE MEMBERSHIP TOOLS TRAINING

Great Lakes Bay Region | Michigan Crossroads Council

BOY SCOUTS OF AMERICA®
MICHIGAN CROSSROADS COUNCIL

HOUSEKEEPING

Are you a Key 3 Member or Key 3 Delegate?

Please type your questions in the chat.

At the end of each section, we will go through all questions.

We will take a group break halfway through the presentation.

These materials will be provided, with today's recording, after the presentation so you can reference the materials with questions.

1.
Introductions and Tools

YOUR PANELISTS

Jake Straub
District Director
Great Lakes Bay Region

Samantha Burke
Membership Chair
Shoreline District

Michael Lynch
Membership Chair
Heartland District

Brandon Kathman
Membership Chair
Ojibway District

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AGENDA

Introduction and Overview of Tools

Get More Information About Us

Online Applications

Managing Your Unit 101

Other Tools and Resources

WHY ARE WE HERE?

- Our purpose here today is to go over several of the online membership tools that your unit can use to welcome new families to Scouting!
- We have organized the information in a way that focuses on how you, the unit leader, would interact with different interested people.

TOOLS TO REMEMBER

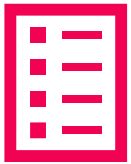
All of the following tools can be found in the **my.scouting.org** website

APPLICATION MANAGER

INVITATION MANAGER

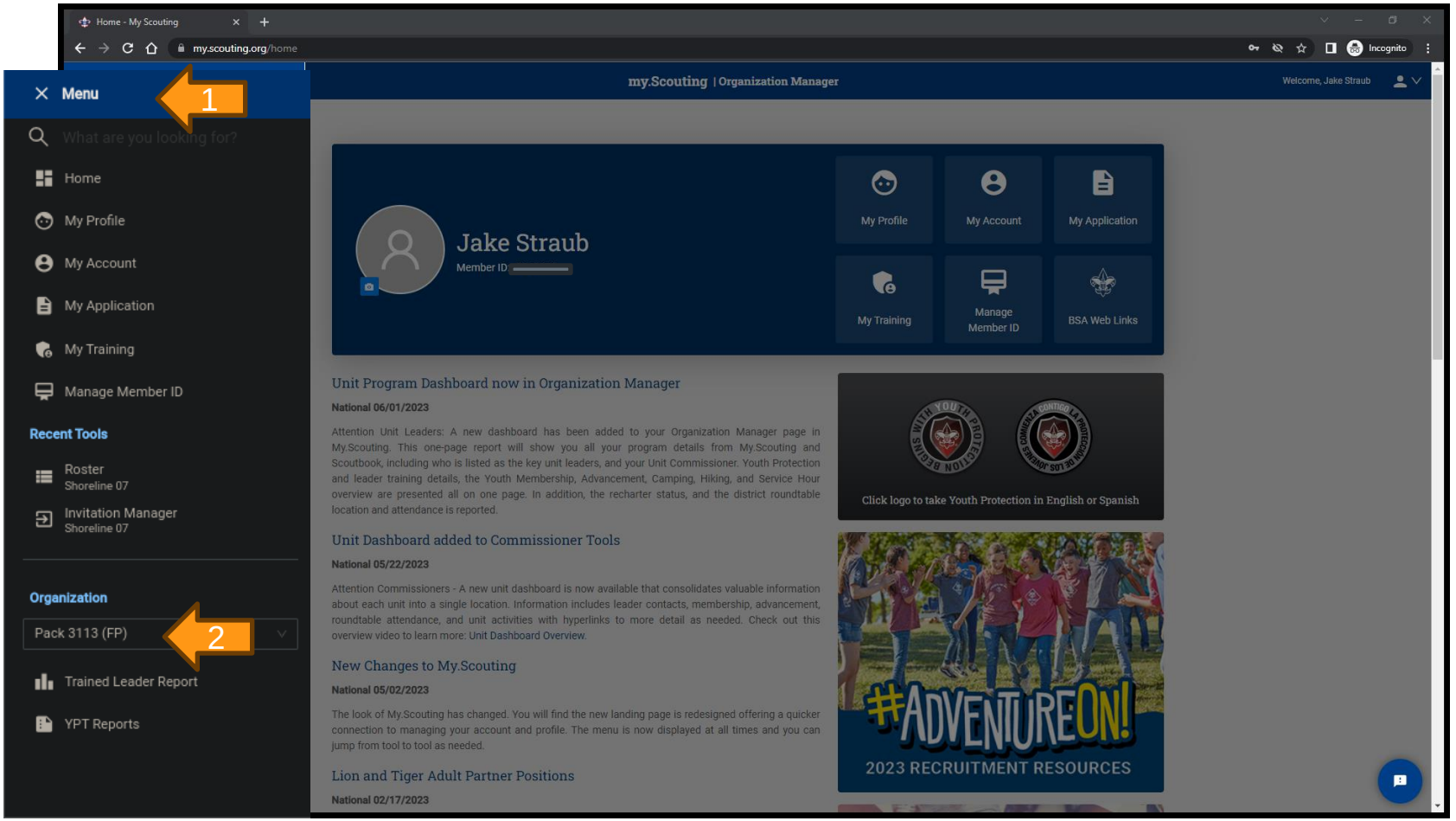
ORGANIZATION MANAGER

ROSTERS



HELPFUL TIPS AND TRICKS

1. Create a Scouting Email
2. Use Google Chrome when using my.scouting.org
3. If something fails to load…
    1. Which browser are you using?
    2. Try an “incognito” browser


Home - My Scouting
my.scouting.org/home
Incognito
Menu
1
What are you looking for?
Home
My Profile
My Account
My Application
My Training
Manage Member ID
Recent Tools
Roster
Shoreline 07
Invitation Manager
Shoreline 07
Organization
Pack 3113 (FP)
2
Trained Leader Report
YPT Reports
my.Scouting | Organization Manager
Welcome, Jake Straub
Jake Straub
Member ID
My Profile
My Account
My Application
My Training
Manage Member ID
BSA Web Links
Unit Program Dashboard now in Organization Manager
National 06/01/2023
Attention Unit Leaders: A new dashboard has been added to your Organization Manager page in My.Scouting. This one-page report will show you all your program details from My.Scouting and Scoutbook, including who is listed as the key unit leaders, and your Unit Commissioner. Youth Protection and leader training details, the Youth Membership, Advancement, Camping, Hiking, and Service Hour overview are presented all on one page. In addition, the recharter status, and the district roundtable location and attendance is reported.
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National 05/22/2023
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Lion and Tiger Adult Partner Positions
National 02/17/2023
Click logo to take Youth Protection in English or Spanish
#ADVENTUREON!
2023 RECRUITMENT RESOURCES

2.

GET MORE INFORMATION ABOUT US

How your Unit is presented to the public

| Invitation Manager | Organization Manager |

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BE A SCOUT!

1.

Beascout.org is the first-place prospective families should go to get information about Scouting.

2.

Prospective families will put in their zip codes and any Units within a geographic area will pop up.

3.

Prospective families can communicate with you or even apply right away.

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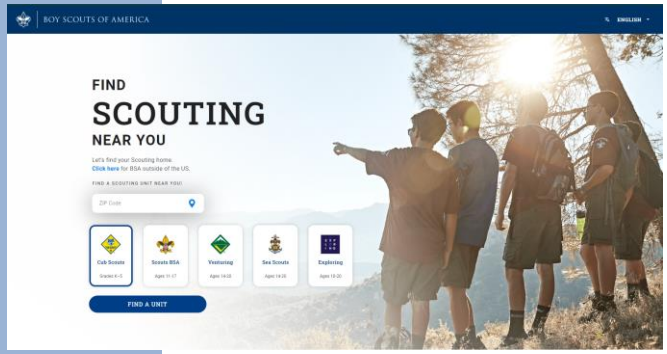


BOY SCOUTS OF AMERICA

Michigan Crossroads Council Council 780

Girl Troop

Online Registration available for this unit.

JOIN US! We meet weekly on Monday nights. Our girls love a wide variety of activities from hiking and biking to skiing and skating. We have regular camping trips that are always a highlight for the scouts and summer camp as well

Request More Information | APPLY NOW

7 Troop 0798 Blessed Sacrament Catholic School — 9.2 miles

3109 Swede Ave
Midland MI 48642

Contact: Richard Adam
Email [redacted]

Boy Troop

Online Registration available for this unit.

Come join us! We meet on Monday nights. Our boys love a wide variety of activities from hiking and biking to skiing and skating. We have regular camping trips that are always a highlight for the scouts and summer camp as well.

Request More Information | APPLY NOW

8 Troop 0767 American Legion Post #165 — 9.7 miles

2808 Waldo Ave.
Midland MI 48642

Contact: Todd McQuiston
Phone: [redacted]

Boy Troop

Online Registration available for this unit.

Request More Information | APPLY NOW

BE SURE TO INCLUDE

1.

Contact Information

2.

Meeting Information

3.

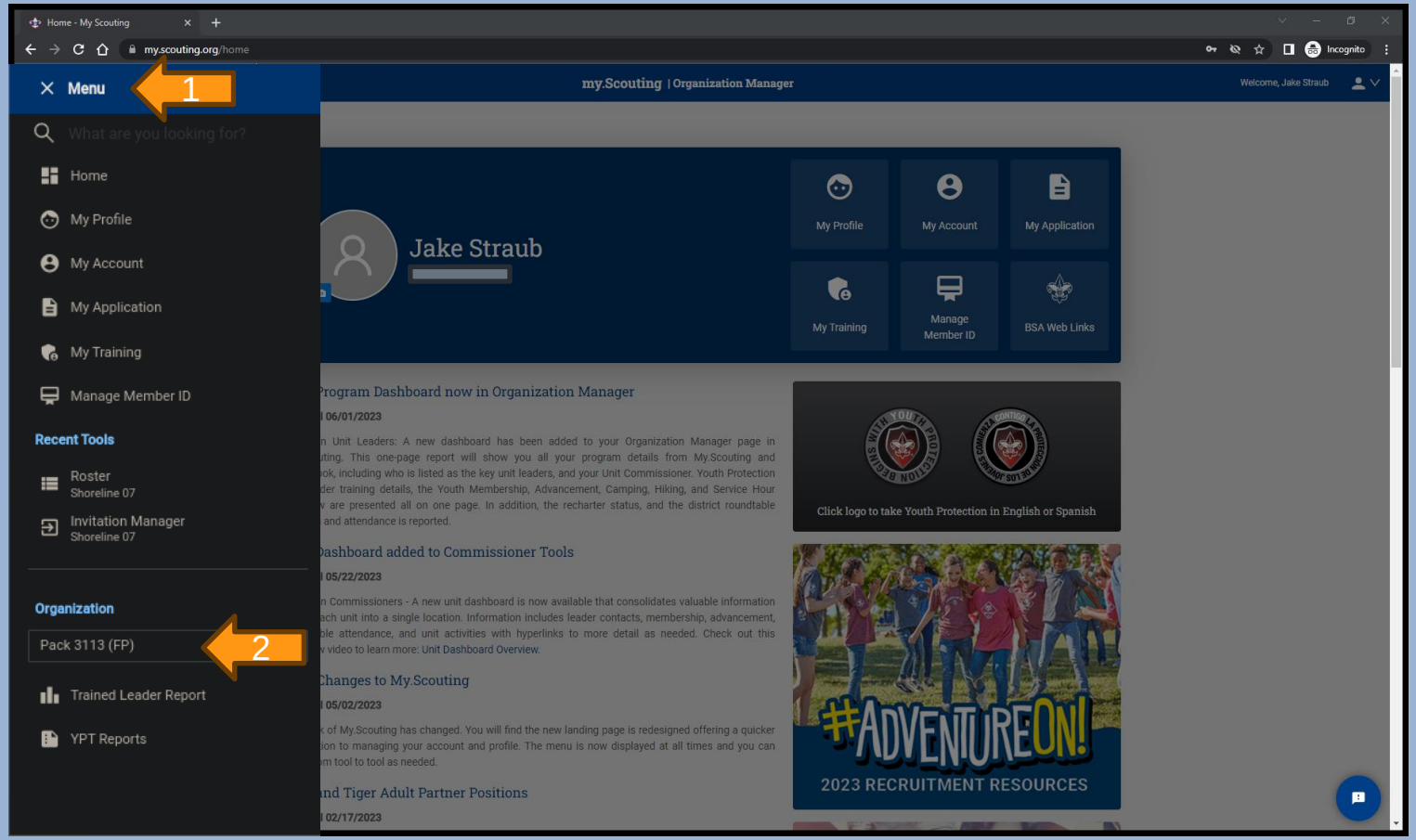
Unit Information/Fact Sheet

4.

A link to a public unit Facebook page or website

5.

Anything descriptive!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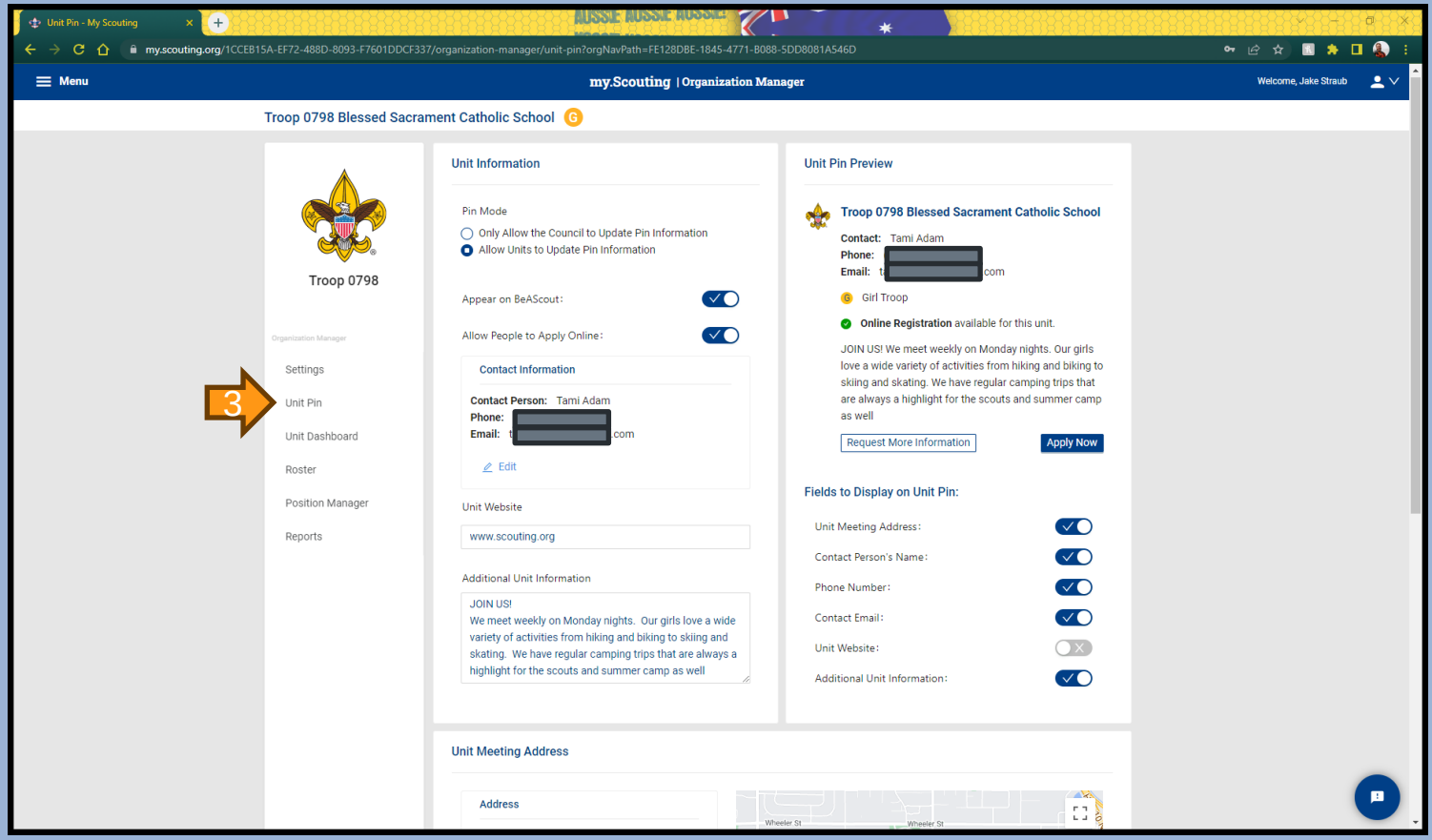

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INVITATION MANAGER

WHAT IS IT

You can display more or less information to new families.

Families can “send” an invitation to you directly about Scouting.

WHO HAS ACCESS

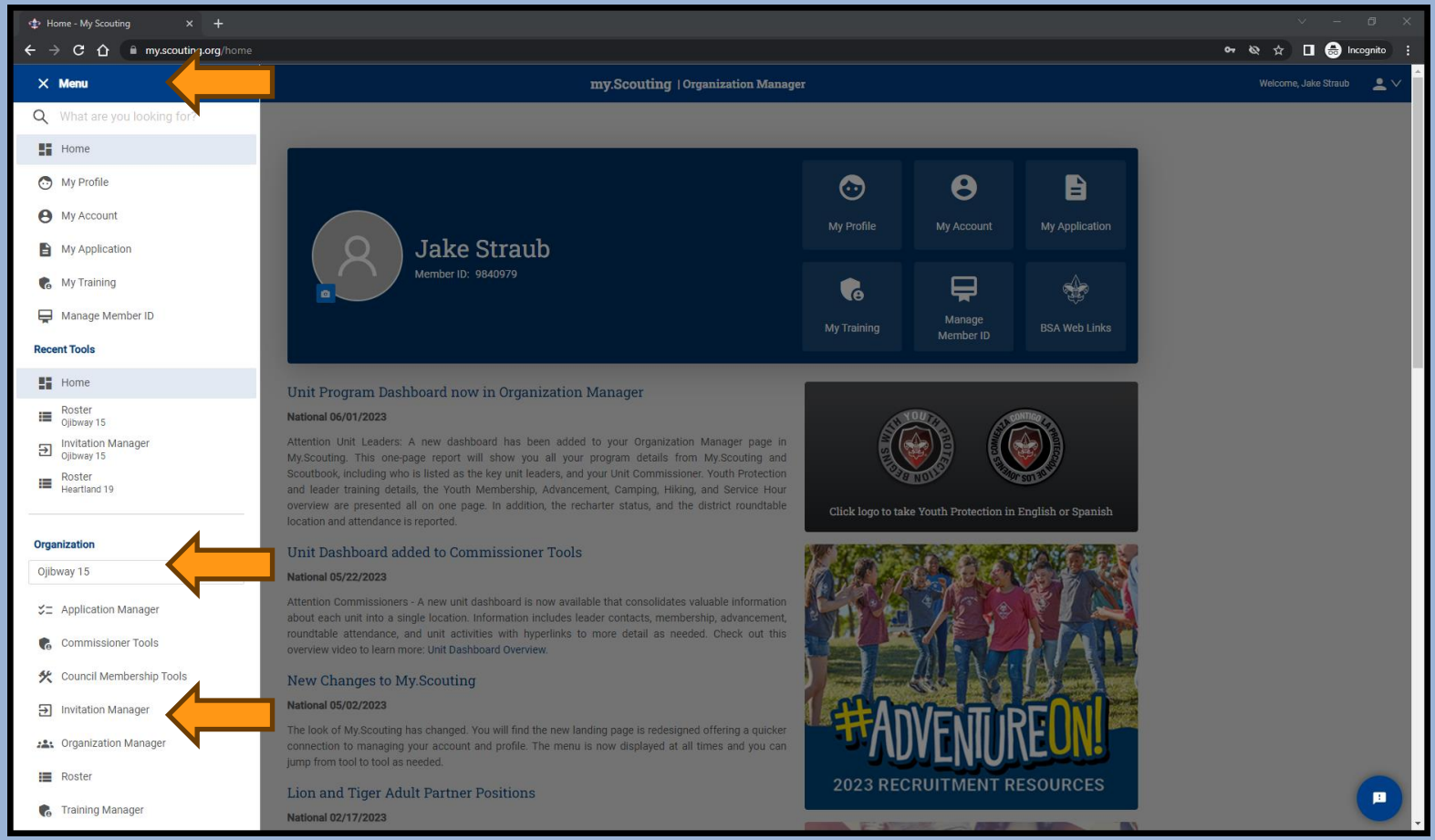
Unit Key 3 or Key 3 Delegates have the most access.

An assigned Registration Inquiry person will also have access.

INVIATIONS AND WHAT TO DO WITH THEM

You must respond to invitations within seven (7) days.

Most units will use the email feature to communicate.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Ojibway 15
Invitation Manager
Ojibway 15
Roster
Heartland 19
Organization
Ojibway 15
Application Manager
Commissioner Tools
Council Membership Tools
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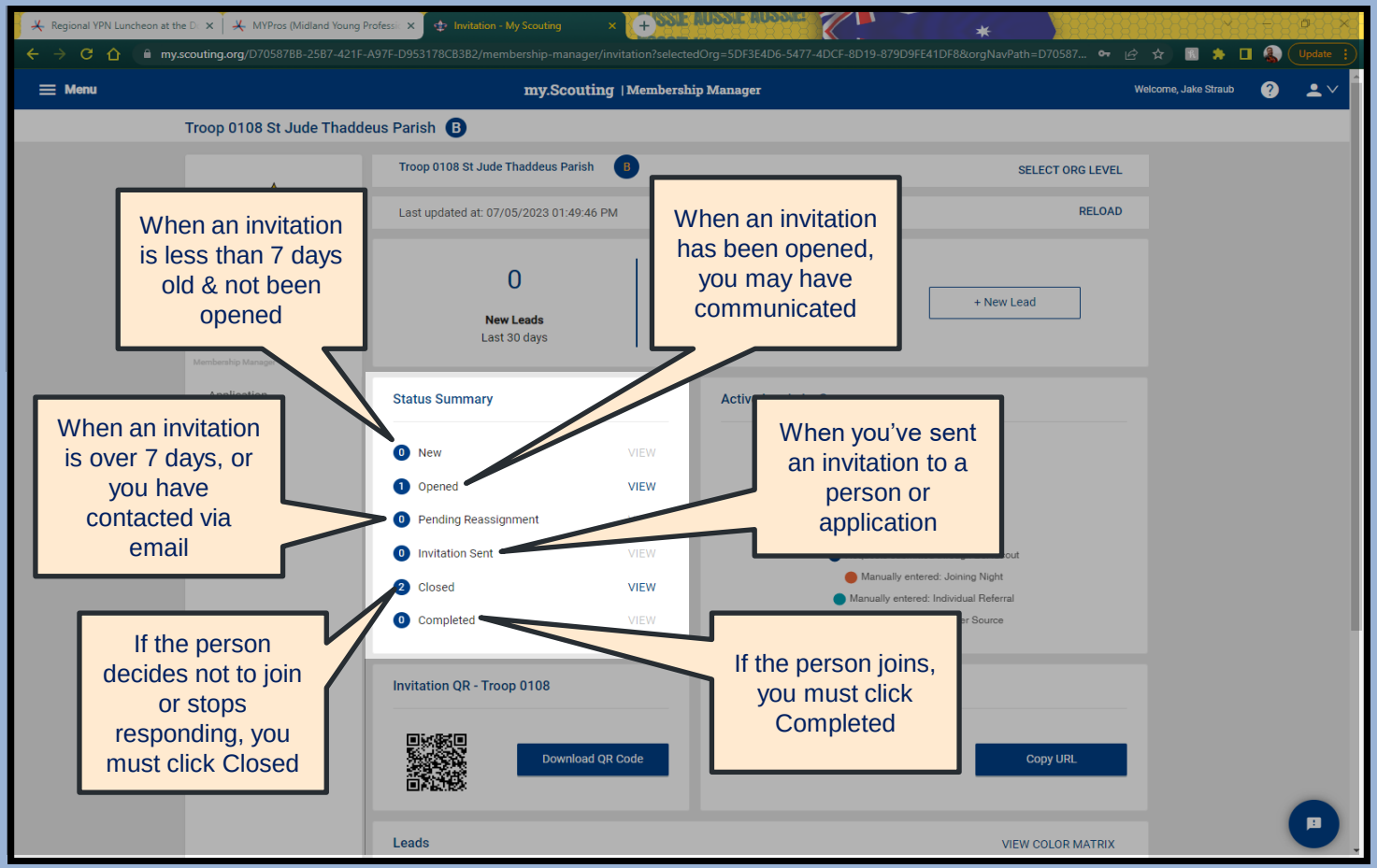
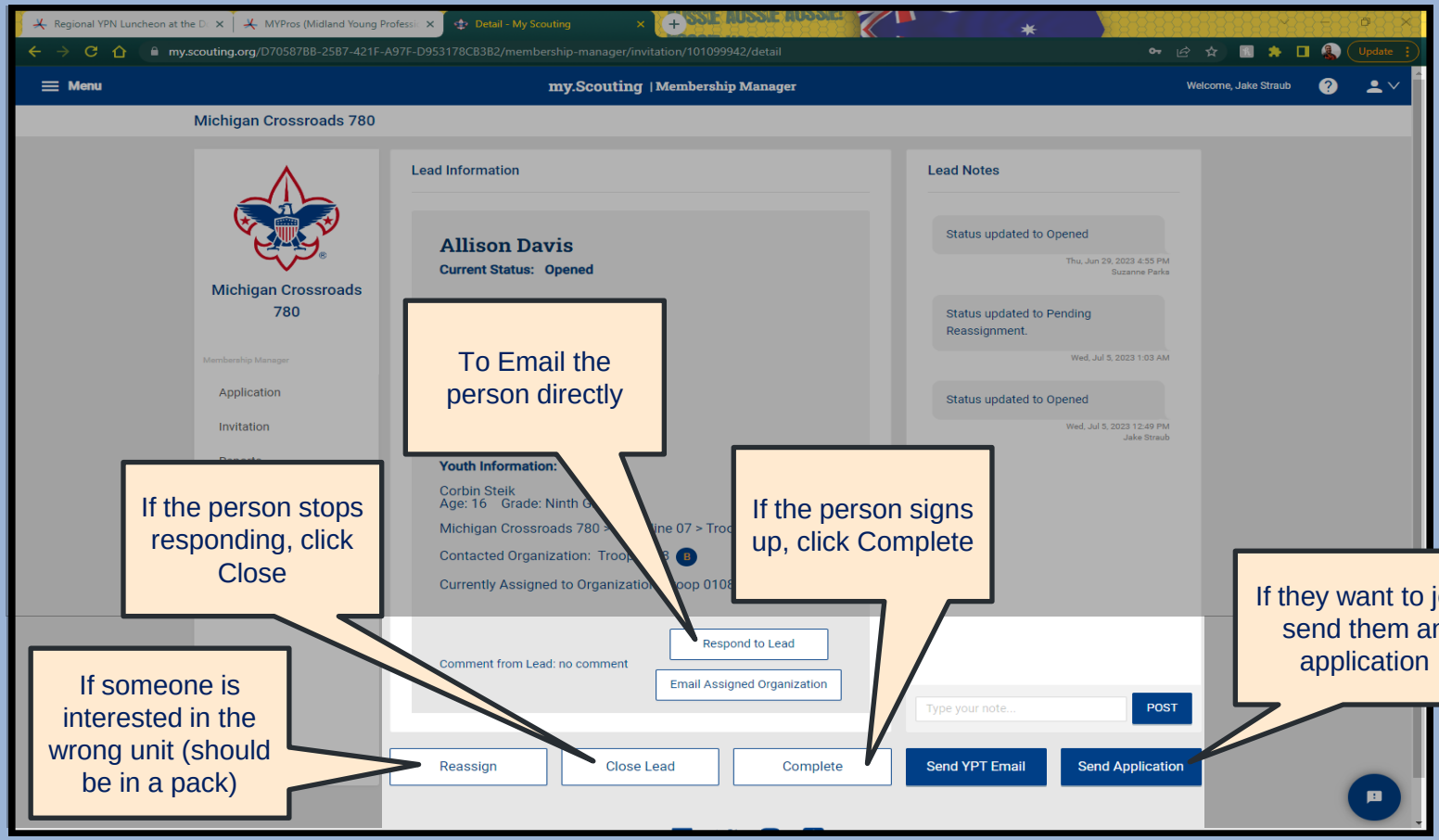
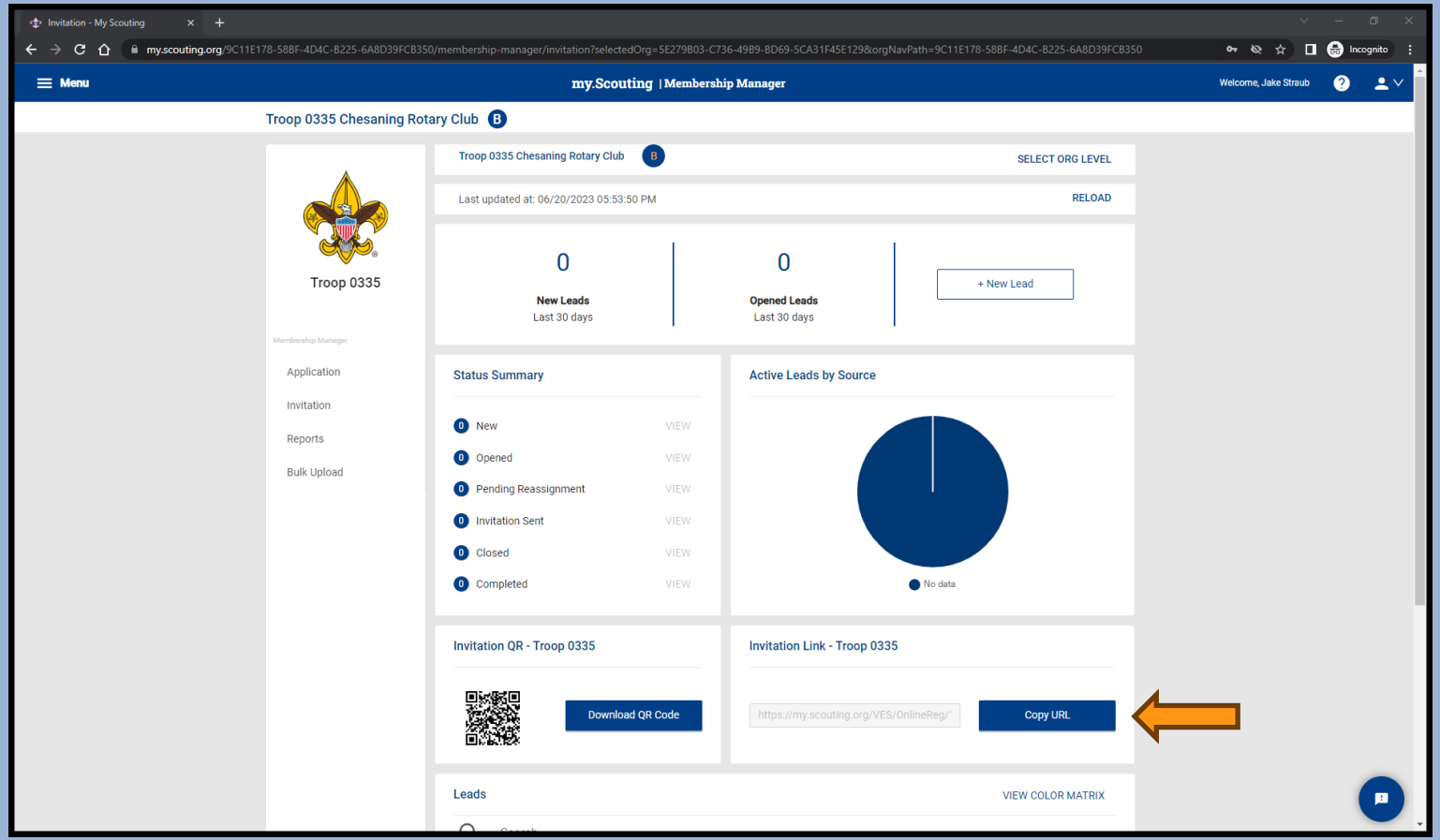

Regional YPN Luncheon at the D
MYPros (Midland Young Professi
Invitation - My Scouting
my.scouting.org/D70587BB-25B7-421F-A97F-D953178CB3B2/membership-manager/invitation?selectedOrg=5DF3E4D6-5477-4DCF-8D19-879D9FE41DF8&orgNavPath=D70587...
Update
Menu
my.Scouting | Membership Manager
Welcome, Jake Straub
Troop 0108 St Jude Thaddeus Parish B
Troop 0108 St Jude Thaddeus Parish B
SELECT ORG LEVEL
Last updated at: 07/05/2023 01:49:46 PM
RELOAD
0
New Leads
Last 30 days
+ New Lead
Status Summary
0 New VIEW
1 Opened VIEW
0 Pending Reassignment
0 Invitation Sent VIEW
2 Closed VIEW
0 Completed VIEW
Manually entered: Joining Night
Manually entered: Individual Referral
Invitation QR - Troop 0108
Download QR Code
Copy URL
Leads
VIEW COLOR MATRIX
When an invitation is less than 7 days old & not been opened
When an invitation has been opened, you may have communicated
When an invitation is over 7 days, or you have contacted via email
When you've sent an invitation to a person or application
If the person decides not to join or stops responding, you must click Closed
If the person joins, you must click Completed


my.scouting.org/D70587BB-25B7-421F-A97F-D953178CB3B2/membership-manager/invitation/101099942/detail
Menu
my.Scouting | Membership Manager
Welcome, Jake Straub
Michigan Crossroads 780
Michigan Crossroads 780
Application
Invitation
Lead Information
Allison Davis
Current Status: Opened
Youth Information:
Corbin Steik
Age: 16 Grade: Ninth G
Michigan Crossroads 780 > ine 07 > Troo
Contacted Organization: Troop
Currently Assigned to Organizatio oop 0108
Lead Notes
Status updated to Opened
Thu, Jun 29, 2023 4:55 PM
Suzanne Parks
Status updated to Pending Reassignment.
Wed, Jul 5, 2023 1:03 AM
Status updated to Opened
Wed, Jul 5, 2023 12:49 PM
Jake Straub
Comment from Lead: no comment
Respond to Lead
Email Assigned Organization
Type your note...
POST
Reassign
Close Lead
Complete
Send YPT Email
Send Application
To Email the person directly
If the person stops responding, click Close
If the person signs up, click Complete
If they want to join send them an application
If someone is interested in the wrong unit (should be in a pack)

INVITING SOMEONE TO LEARN MORE

- This is the simplest way to invite people to join or learn more about your Unit
- You can invite someone three (3) different ways: (1) send them an email, (2) send or print a QR code, (3) send someone a direct link
- The invitations are specific to your Unit
- The next slides will show you how you can invite a “Crossover” to your Troop



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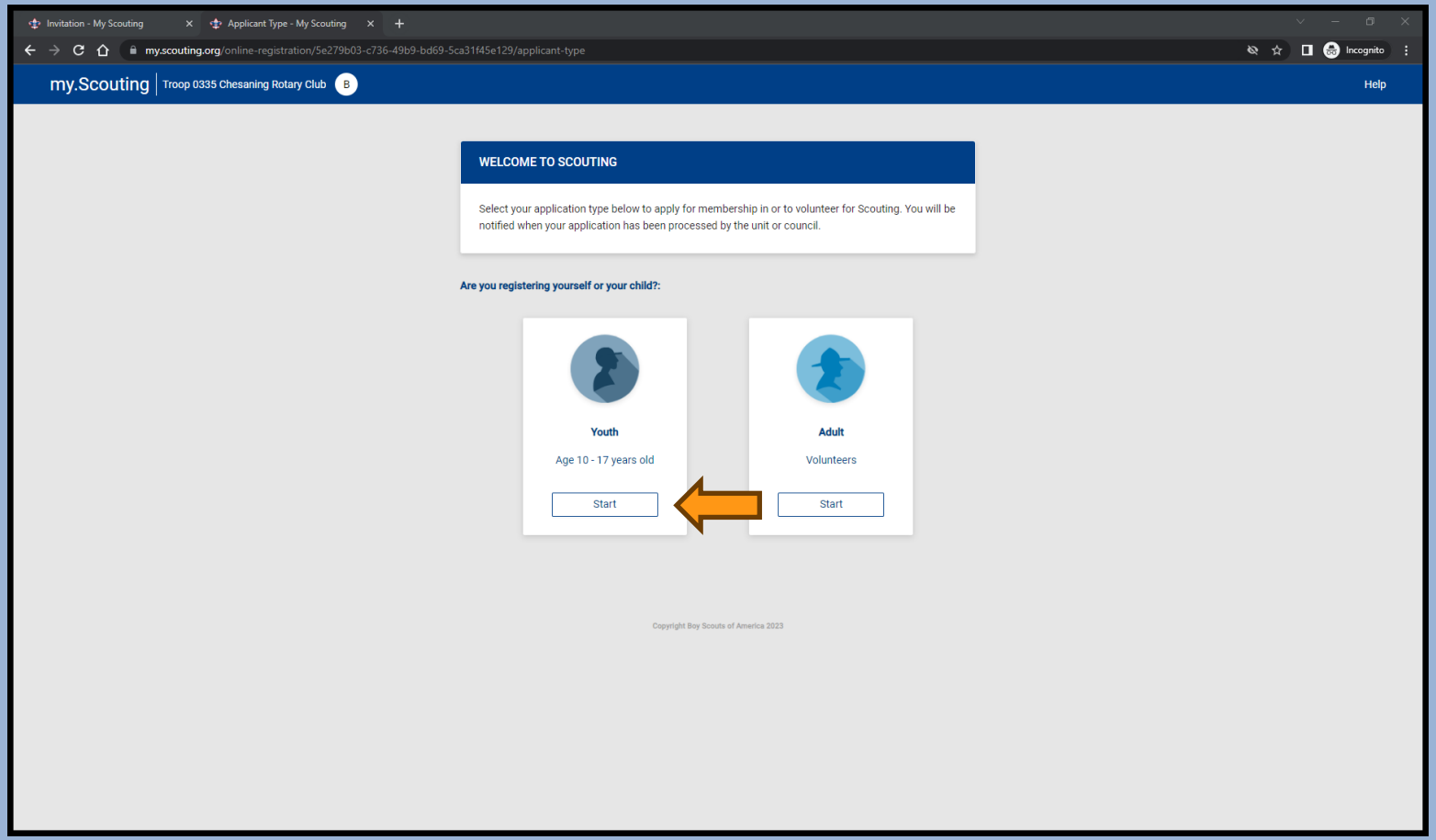

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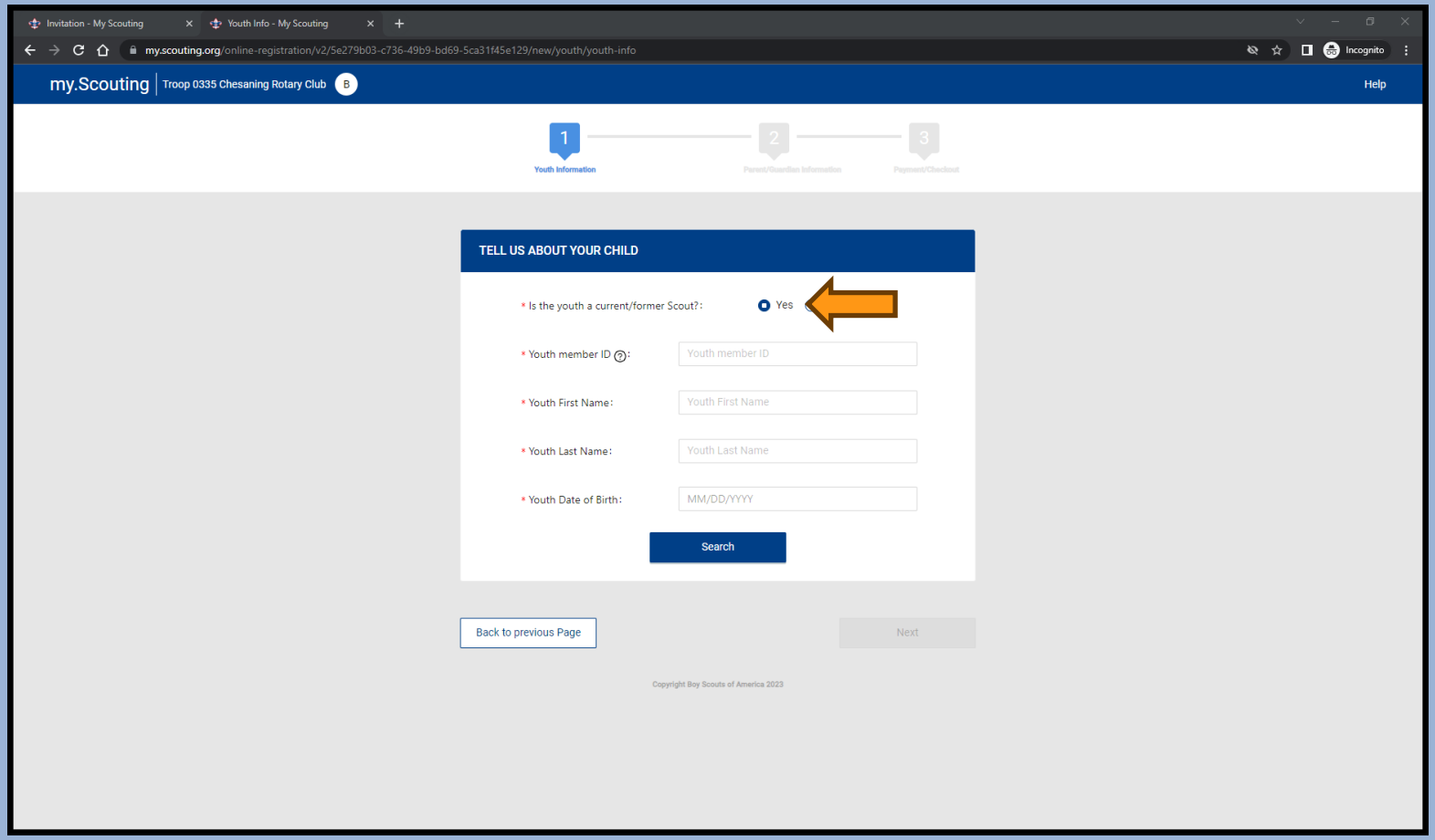

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ADDING A FEE AND WELCOME EMAIL TO INVITATION MANAGER

You can set up an automatic welcome email to people who join your Unit

We recommend you set up a welcome email including your meeting location/time, leader contacts, Facebook page, and anything a prospective family may need to know.

You can include unit dues amount and explanation

You will need to collect those fees (currently) through another means

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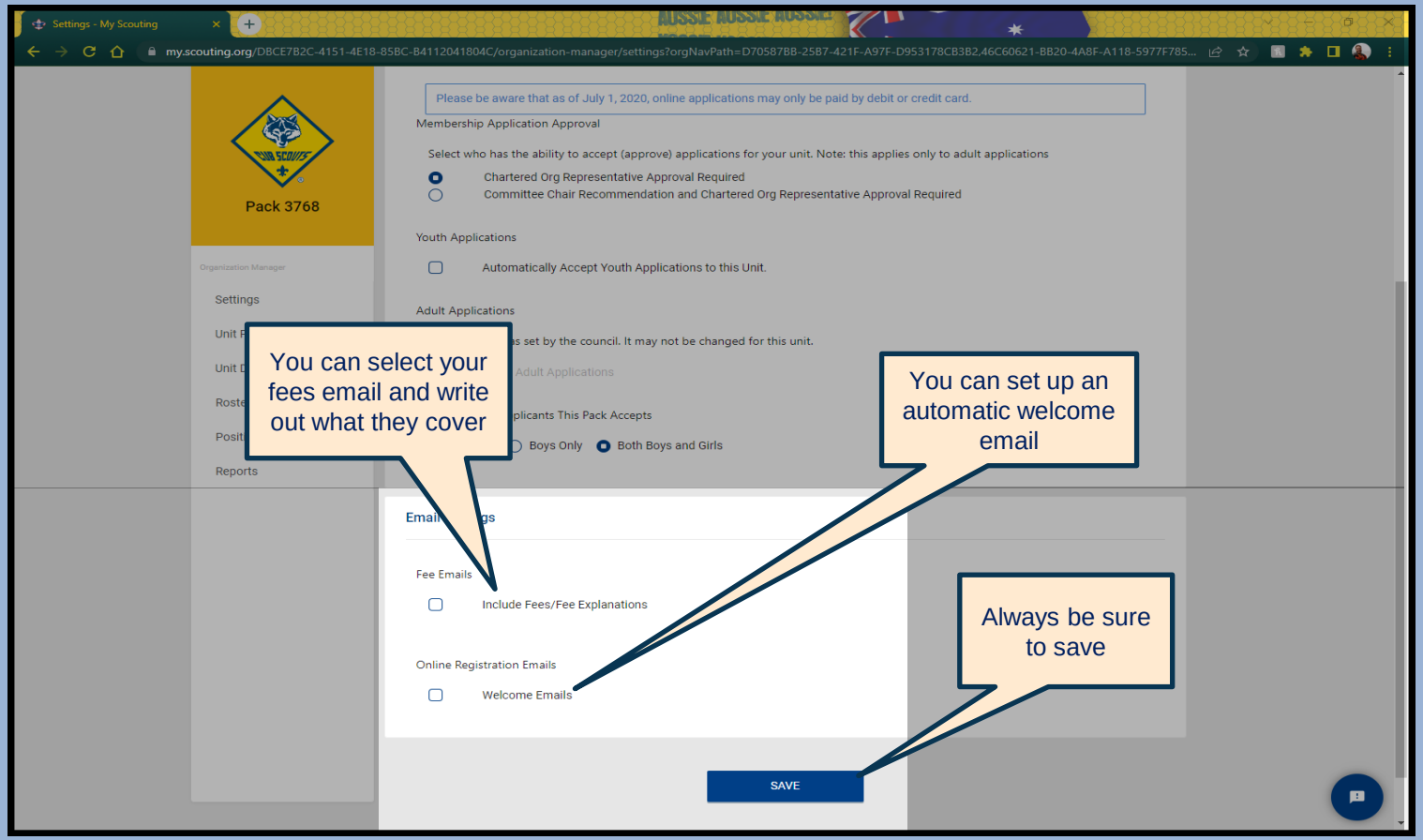
Settings - My Scouting
my.scouting.org/DBCE7B2C-4151-4E18-85BC-B411204180 4C/organization-manager/settings?orgNavPath=D70587BB-25B7-421F-A97F-D953178CB3B2,46C60621-BB20-4A8F-A118-5977F785...
Pack 3768
Please be aware that as of July 1, 2020, online applications may only be paid by debit or credit card.
Membership Application Approval
Select who has the ability to accept (approve) applications for your unit. Note: this applies only to adult applications
Chartered Org Representative Approval Required
Committee Chair Recommendation and Chartered Org Representative Approval Required
Youth Applications
Automatically Accept Youth Applications to this Unit.
Adult Applications
Organization Manager
Settings
Reports
Boys Only
Both Boys and Girls
Fee Emails
Include Fees/Fee Explanations
Online Registration Emails
Welcome Emails
SAVE
You can select your fees email and write out what they cover
You can set up an automatic welcome email
Always be sure to save

HELPFUL TRICKS AND TIPS

You will get a daily email if someone is interested in your Unit. Each email will include a link. If you click the link, it will take you directly to that invitation.

Respond to leads quickly! At seven (7) days, the system will automatically send the invitation to the District.

Links and QR codes are specific to your Unit and can not be shared with another Unit, even when the Charter partner is the same, or when registering Merit Badge Counselors

Understand the difference between “New”, “Multiple”, and “Transfer”

Questions?

3.

APPLY ONLINE

How prospective families can apply to join your Unit

| Application Manager | Organization Manager |

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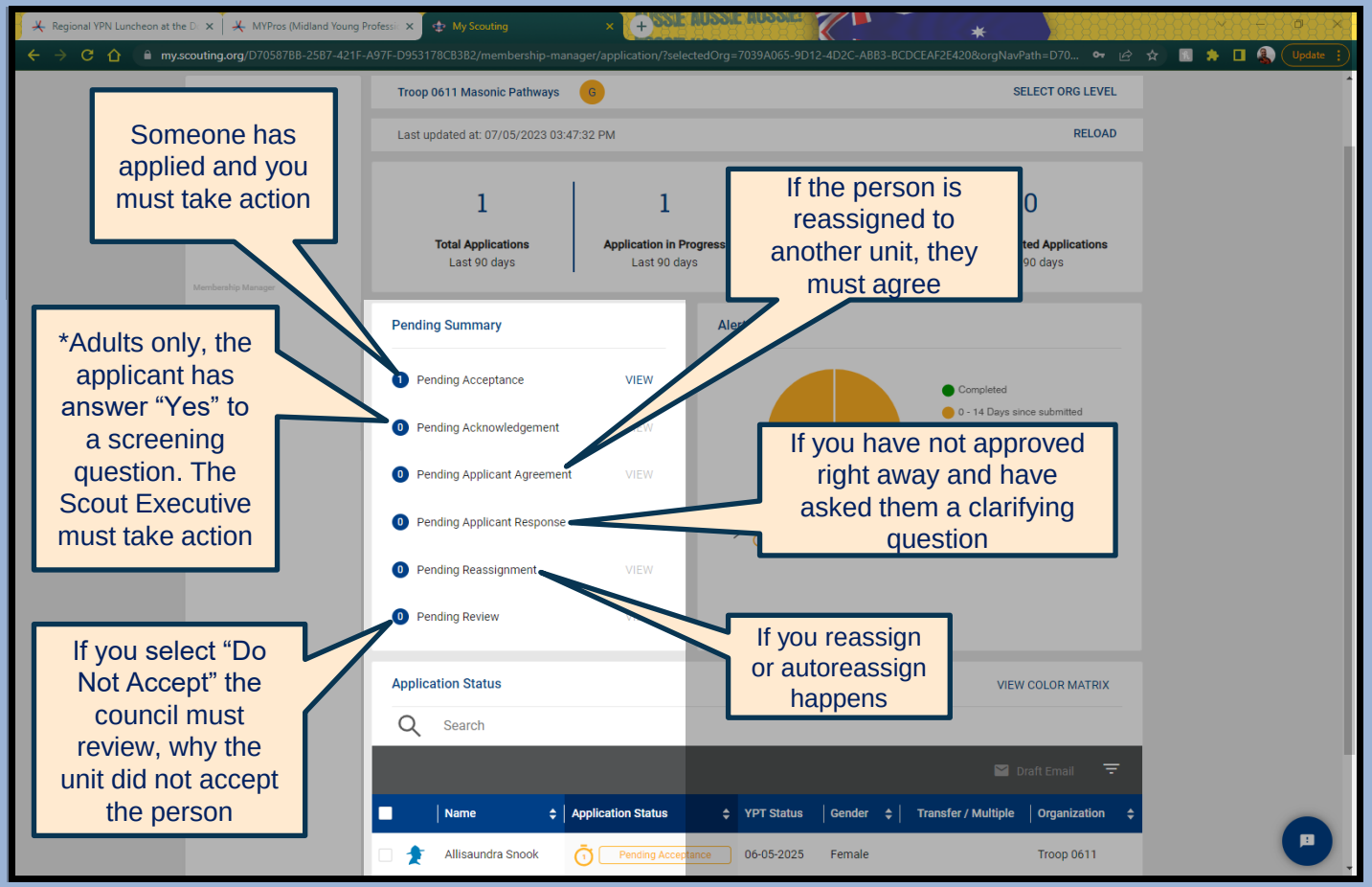
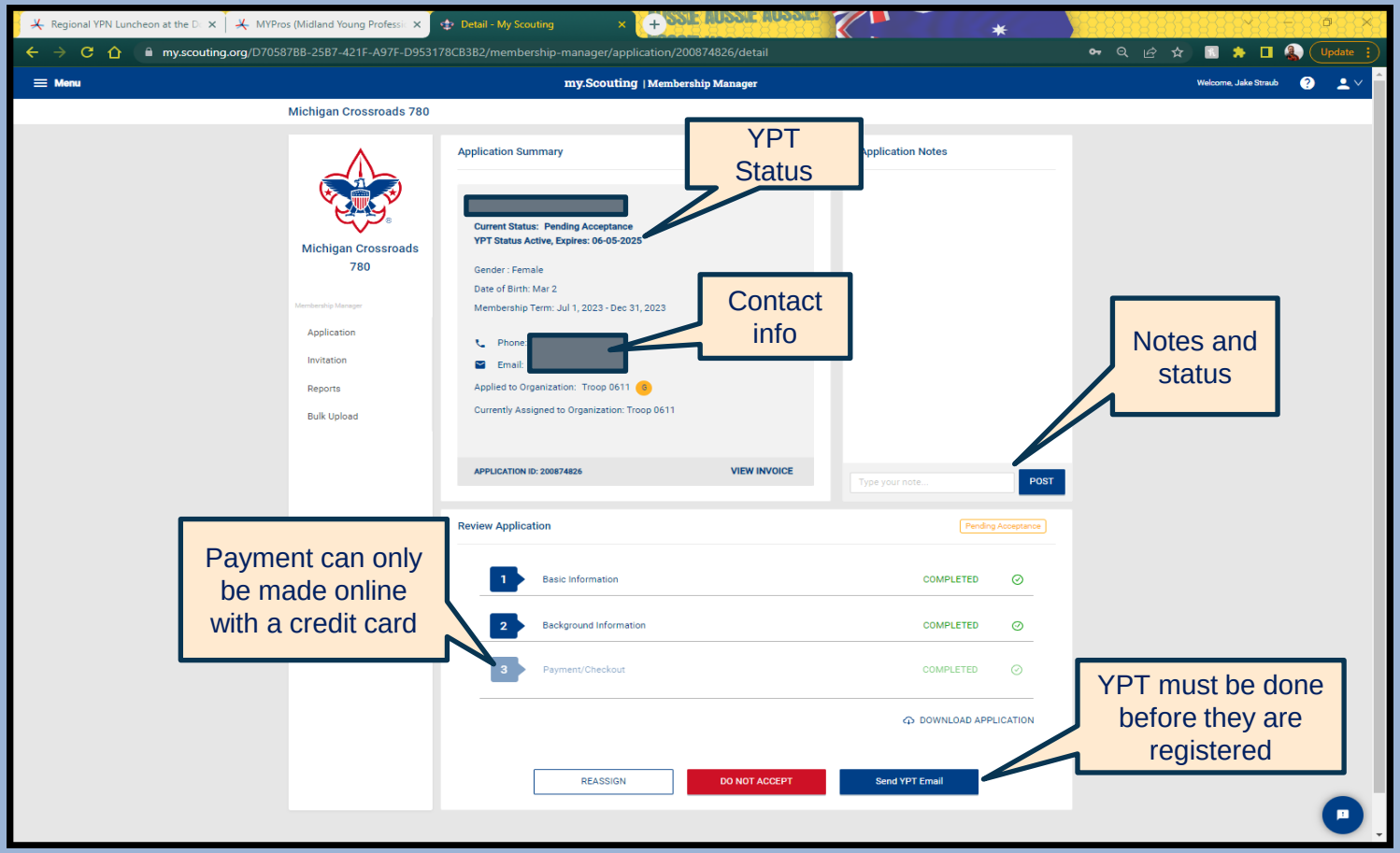
APPLICATION MANAGER

The application manager is where you as a Unit leader can accept, deny, or interact with families who want to or have applied to join your Unit

Key 3 Members and Key 3 Delegates have the ability to approve youth applications. Registration Inquiry can see applications but cannot approve them

When someone applies you can accept, reject, or reassign their application to the district


Someone has applied and you must take action
*Adults only, the applicant has answer “Yes” to a screening question. The Scout Executive must take action
If you select “Do Not Accept” the council must review, why the unit did not accept the person
If the person is reassigned to another unit, they must agree
If you have not approved right away and have asked them a clarifying question
If you reassign or autoreassign happens
Troop 0611 Masonic Pathways
SELECT ORG LEVEL
Last updated at: 07/05/2023 03:47:32 PM
RELOAD
1
Total Applications
Last 90 days
1
Application in Progress
Last 90 days
Pending Summary
Pending Acceptance
VIEW
Pending Acknowledgement
Pending Applicant Agreement
Pending Applicant Response
Pending Reassignment
Pending Review
Completed
0 - 14 Days since submitted
Application Status
VIEW COLOR MATRIX
Search
Draft Email
Name
Application Status
YPT Status
Gender
Transfer / Multiple
Organization
Allisaundra Snook
Pending Acceptance
06-05-2025
Female
Troop 0611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Update
Menu
my.Scouting | Membership Manager
Welcome, Jake Straub
Michigan Crossroads 780
Michigan Crossroads 780
Membership Manager
Application
Invitation
Reports
Bulk Upload
Application Summary
YPT Status
Current Status: Pending Acceptance
YPT Status Active, Expires: 06-05-2025
Gender : Female
Date of Birth: Mar 2
Membership Term: Jul 1, 2023 - Dec 31, 2023
Contact info
Phone:
Email:
Applied to Organization: Troop 0611
Currently Assigned to Organization: Troop 0611
APPLICATION ID: 200874826
VIEW INVOICE
Application Notes
Notes and status
Type your note...
POST
Review Application
Pending Acceptance
Payment can only be made online with a credit card
1 Basic Information COMPLETED
2 Background Information COMPLETED
3 Payment/Checkout COMPLETED
DOWNLOAD APPLICATION
REASSIGN
DO NOT ACCEPT
Send YPT Email
YPT must be done before they are registered

WHAT TO DO WITH AN APPLICATION

ACCEPT

Welcome an individual into your Unit.

For youth applications, many leaders have the ability to accept the application.

For adults only, the COR or COR delegate can approve applications (a CC can recommend).

They will **show up instantly on your roster** but takes **24 hours to show on Scoutbook.**

DO NOT ACCEPT

This person is not a good fit and should not be a member of our Unit.

REASSIGN

This person has applied for the wrong Unit (should apply to a female troop, or a Pack).

AUTO ACCEPTING YOUTH APPLICATIONS

PROS

No leader needs to log in to approve applications

Youth immediately show on your roster

Confirmation is given immediately

You are going to approve them anyways

CONS

Prospective families can't use registration assistance

The Unit can't easily pay for the Scout

Can only be done for youth

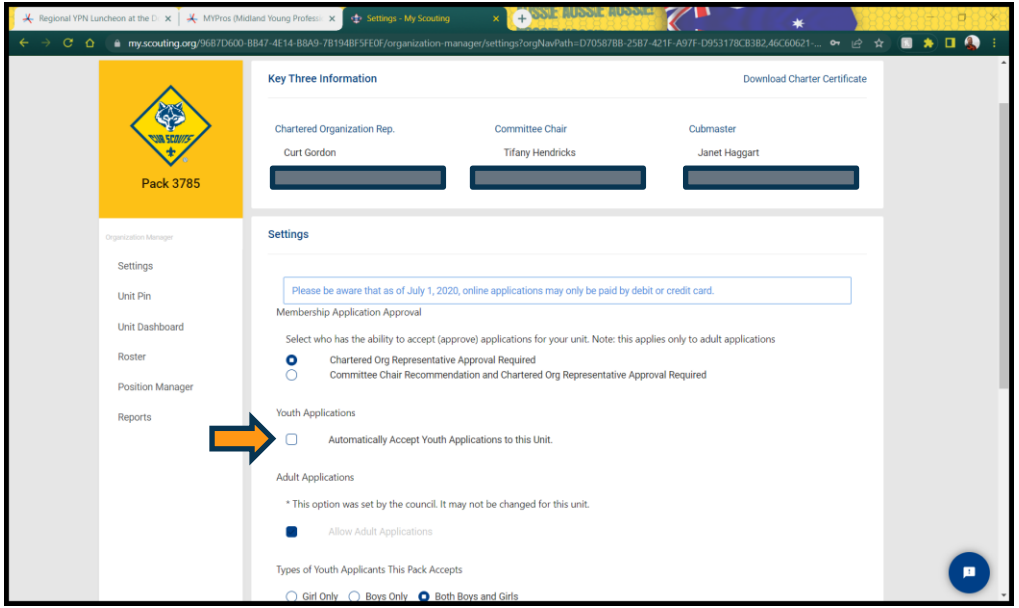
Can't charge Unit dues

HOW TO AUTO ACCEPT YOUTH APPLICATIONS

1. UNDER ORGANIZATION MANAGER

2. SETTINGS SUB MENU

3. AUTOMATICALLY ACCEPT YOUTH APPLICATIONS



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Respond to applications quickly! At seven (7) days, the system will automatically send the application to the District.

Make sure your COR is comfortable enough with computers to accept adults or have them assign a COR delegate. Only COR's or COR Delegates can approve adults – your DE or Registrar can't approve

Questions?

5 MINUTE BREAK

4.

MANAGING YOUR UNIT

How to utilize these tools to positively affect membership and communication in your unit

| Roster | Organization Manager |

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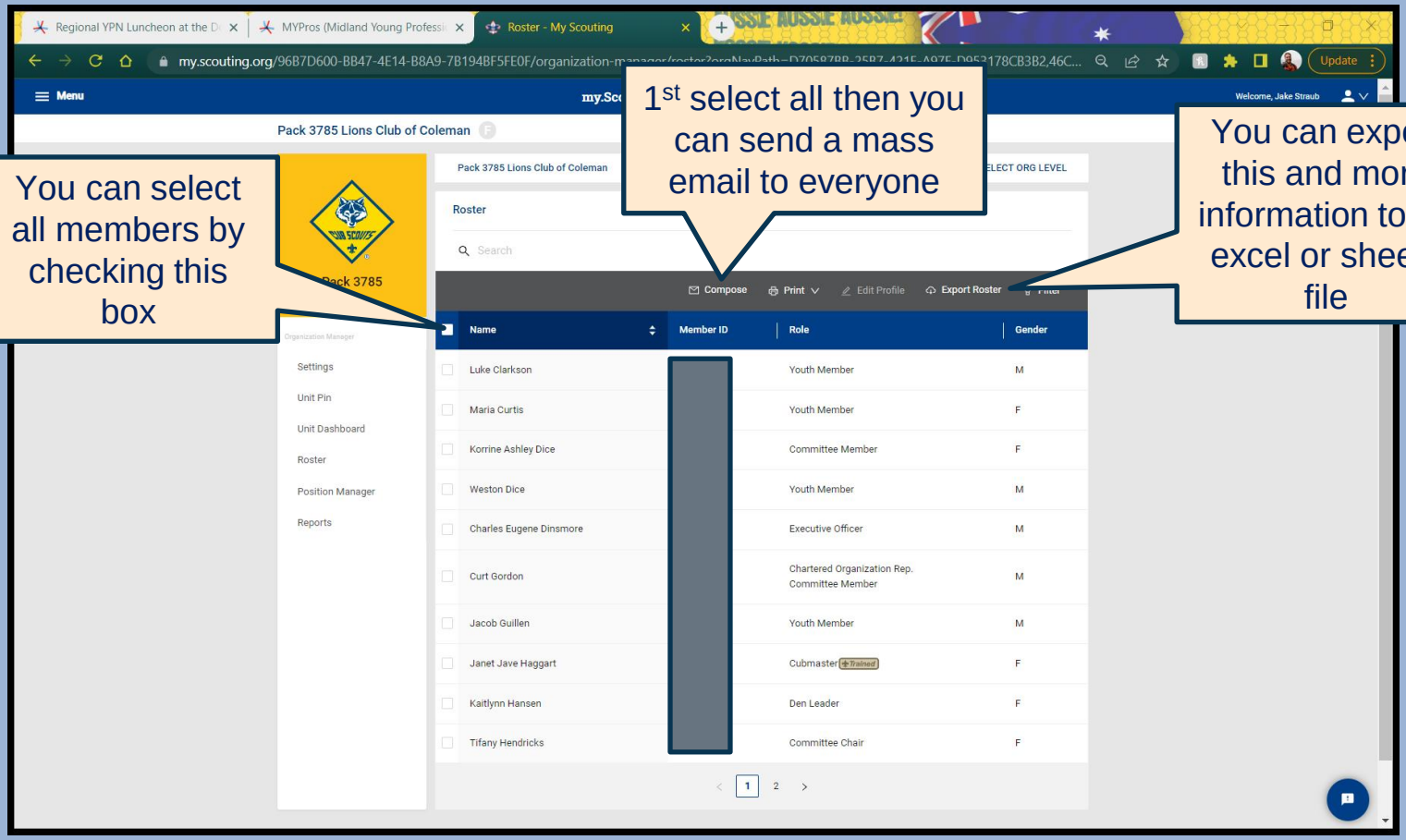
ROSTER

The roster on my.scouting.org is the official registration record for all of your youth and adults

If someone is **not** on your my.scouting.org roster, they are **not registered** in your Unit

Scoutbook links to my.scouting.org and takes 24 hours to sync. **Changes in Scoutbook do not correlate to changes in my.scouting.org**

Your roster includes personal and contact information for all of your Scouts and Leaders – keep it confidential!



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MICHIGAN CROSSROADS COUNCIL

What is included in the Roster?

- Membership ID numbers
- Contact Information
- Birthdays
- YPT status
- Grade/Age

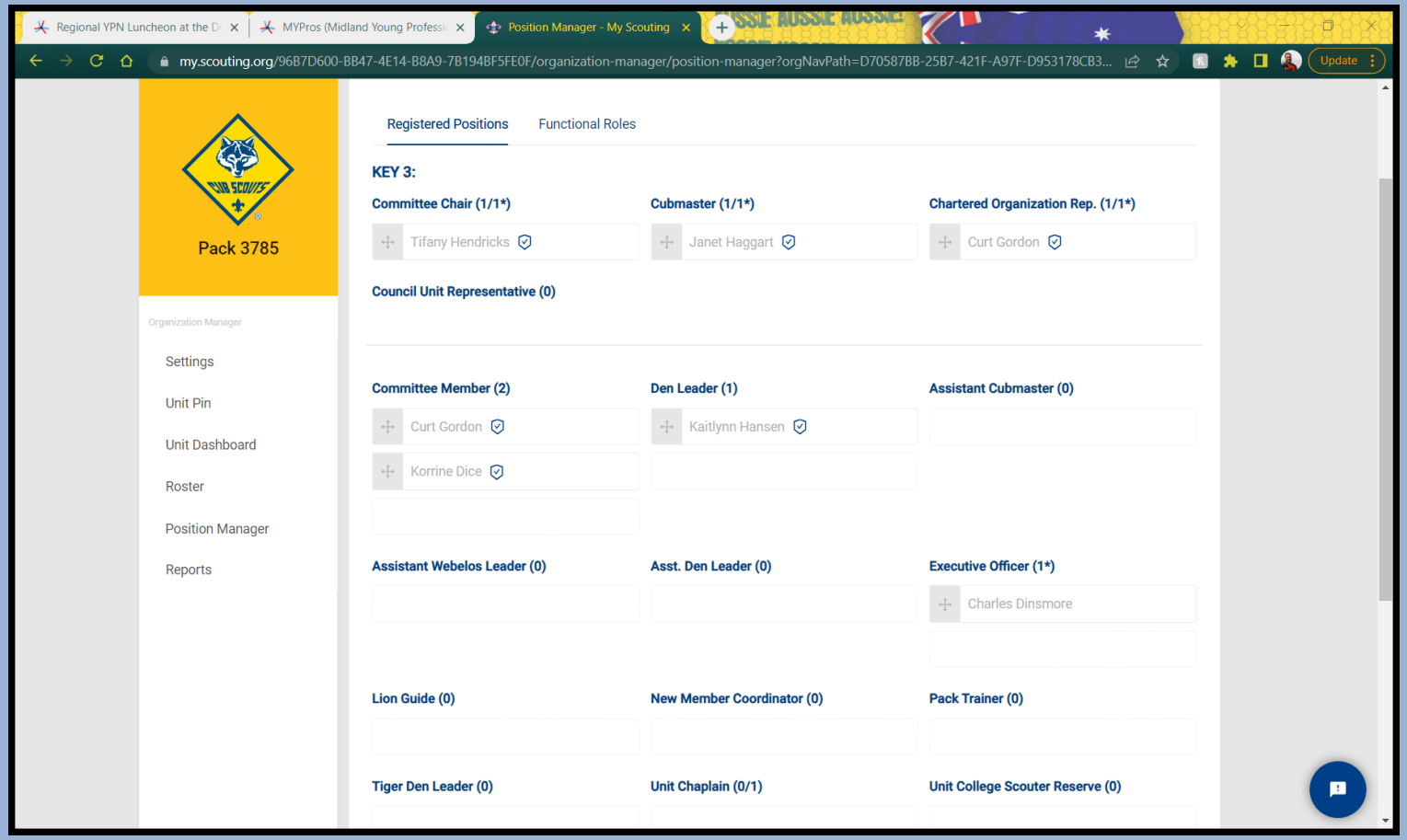
ASSIGNING ADULTS IN MY.SCOUTING.ORG

A Charter Org Rep or COR Delegate has the ability to change adult positions in my.scouting.org

Key 3 also have access to assign “Functional Roles” in the Unit – so can your DE

This feature is incredibly helpful when people change positions as an application is not needed

This can help speed the rechartering process along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Position Manager - My Scouting
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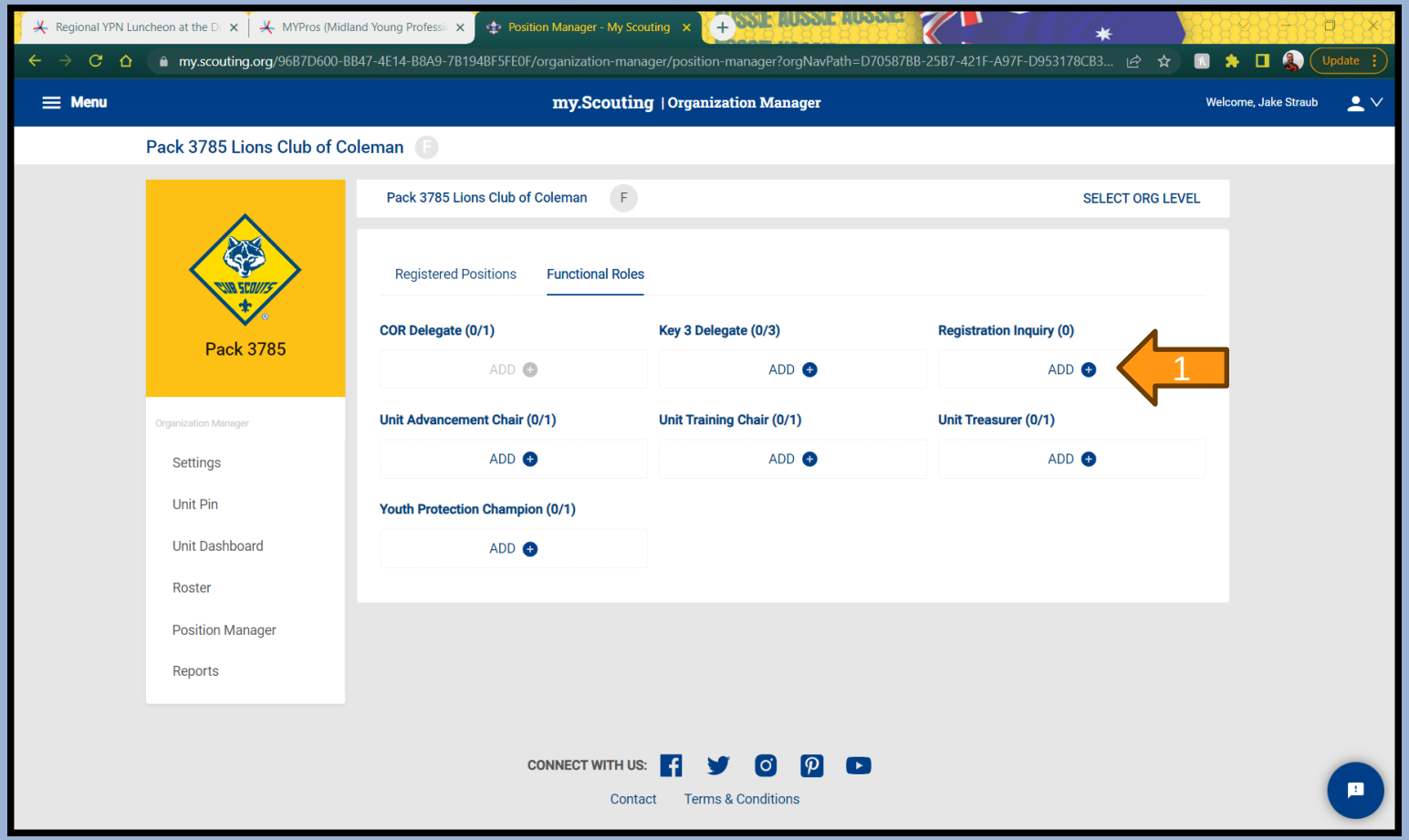
Update
Pack 3785
Organization Manager
Settings
Unit Pin
Unit Dashboard
Roster
Position Manager
Reports
Registered Positions
Functional Roles
KEY 3:
Committee Chair (1/1*)
Tifany Hendricks
Cubmaster (1/1*)
Janet Haggart
Chartered Organization Rep. (1/1*)
Curt Gordon
Council Unit Representative (0)
Committee Member (2)
Curt Gordon
Korrine Dice
Den Leader (1)
Kaitlynn Hansen
Assistant Cubmaster (0)
Assistant Webelos Leader (0)
Asst. Den Leader (0)
Executive Officer (1*)
Charles Dinsmore
Lion Guide (0)
New Member Coordinator (0)
Pack Trainer (0)
Tiger Den Leader (0)
Unit Chaplain (0/1)
Unit College Scouter Reserve (0)


Regional YPN Luncheon at the D
MYPros (Midland Young Professi
Position Manager - My Scouting
my.scouting.org/96B7D600-BB47-4E14-B8A9-7B194BF5FE0F/organization-manager/position-manager?orgNavPath=D70587BB-25B7-421F-A97F-D953178CB3...
Update
Menu
my.Scouting | Organization Manager
Welcome, Jake Straub
Pack 3785 Lions Club of Coleman
F
Pack 3785
Organization Manager
Settings
Unit Pin
Unit Dashboard
Roster
Position Manager
Reports
Pack 3785 Lions Club of Coleman
F
SELECT ORG LEVEL
Registered Positions
Functional Roles
COR Delegate (0/1)
ADD
Key 3 Delegate (0/3)
ADD
Registration Inquiry (0)
ADD
1
Unit Advancement Chair (0/1)
ADD
Unit Training Chair (0/1)
ADD
Unit Treasurer (0/1)
ADD
Youth Protection Champion (0/1)
ADD
CONNECT WITH US:
Contact
Terms & Conditions

ADDITIONAL TOOLS

There are more tools to manage your Unit like the brand new “Unit Dashboard”

There are numerous reports you can run so you know every detail about your Unit

You can explore the training manager to help remind your leaders to stay up to date on YPT and complete training for their position

HELPFUL TRICKS AND TIPS

Only the COR and COR delegate have access to move positions – even your DE and Registrar can not move or approve adults without a COR

You must always have **one** and only one Unit Leader, Committee Chair, and COR – if you are unsure, please check with your DE

If you are already a Key 3 member you do not need Key 3 delegate access

Questions?

5.

OTHER TOOLS

Additional tools in my.scouting.org, innovative ways to use them, and resources outside of my.scouting.org

| Google Drive | Invitation Manager |

HOW TO USE THE INVITATION MANAGER FOR A JSN

1.

You can use the invitation manager to digitally sign in for your Join Scouts Night or Troop Open House

2.

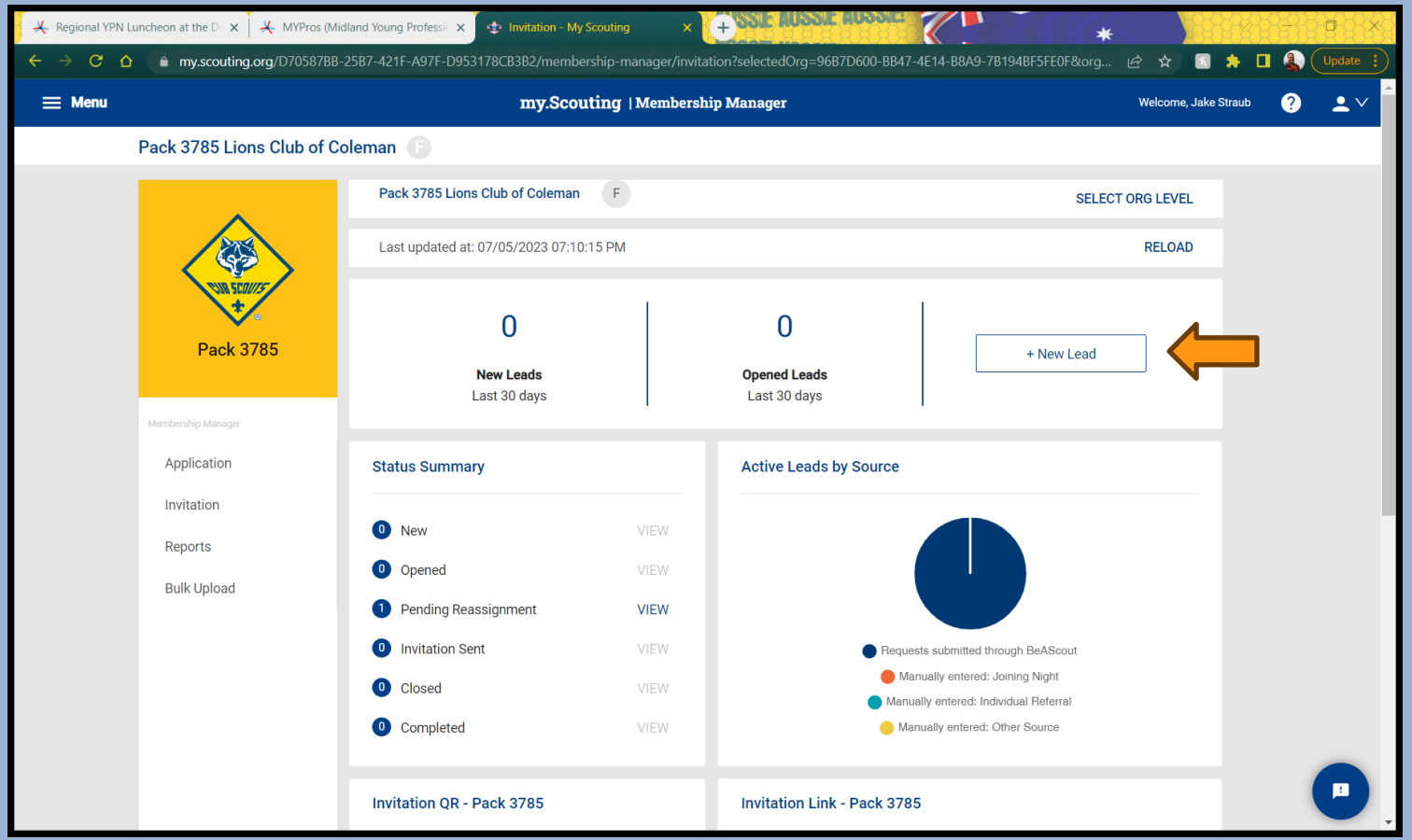
From the invitation manager, you can send your new prospective families an application

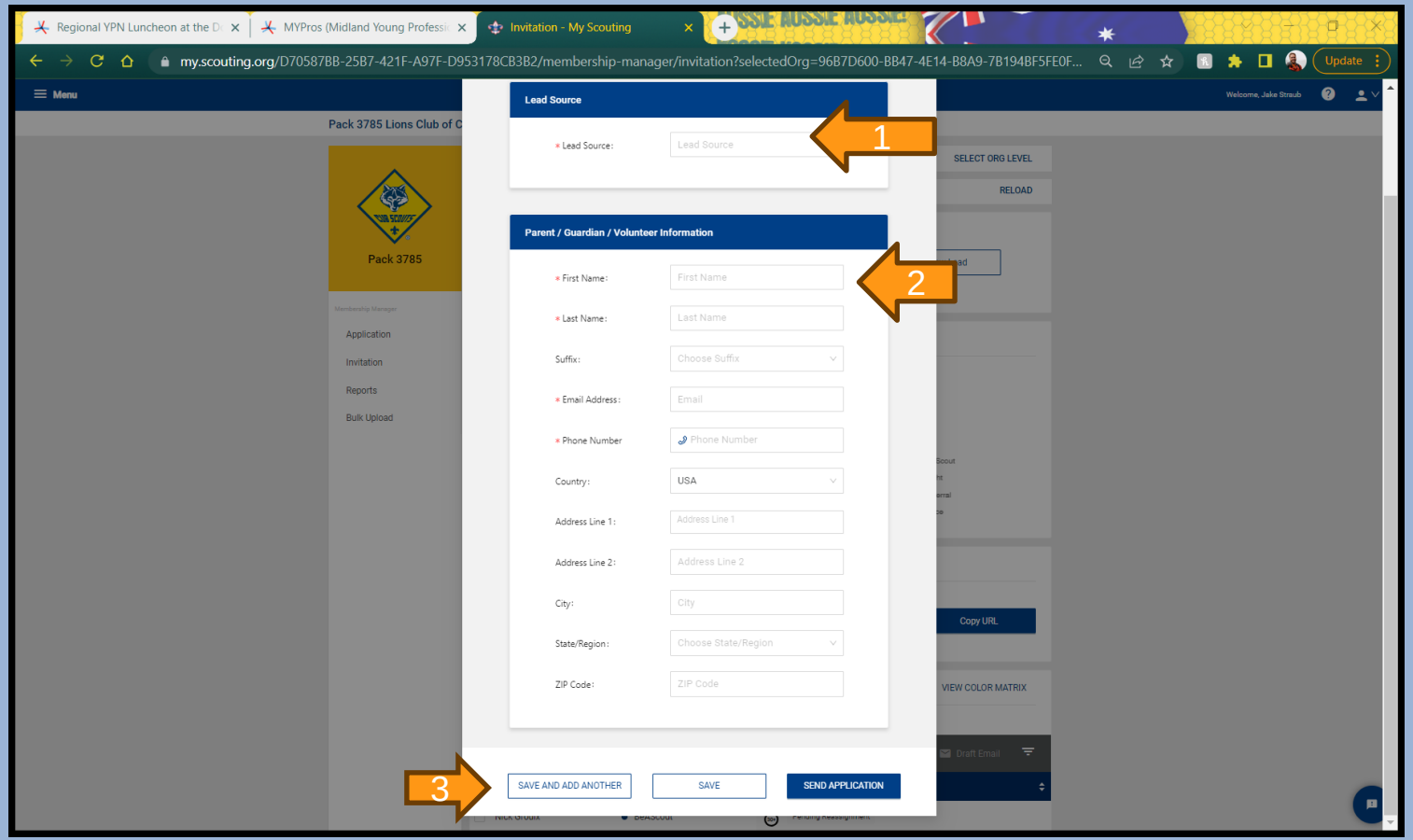
3.

Your Unit should assign a membership chair to manage the invitation leads

4.

Their invitation leads will show up in the invitation manager like normal


Regional YPN Luncheon at the D
MYPros (Midland Young Professi
Invitation - My Scouting
my.scouting.org/D70587BB-25B7-421F-A97F-D953178CB3B2/membership-manager/invitation?selectedOrg=96B7D600-BB47-4E14-B8A9-7B194BF5FE0F&org...
Update
Menu
my.Scouting | Membership Manager
Welcome, Jake Straub
Pack 3785 Lions Club of Coleman
Pack 3785
Membership Manager
Application
Invitation
Reports
Bulk Upload
Pack 3785 Lions Club of Coleman
SELECT ORG LEVEL
Last updated at: 07/05/2023 07:10:15 PM
RELOAD
0
New Leads
Last 30 days
0
Opened Leads
Last 30 days
+ New Lead
Status Summary
0 New VIEW
0 Opened VIEW
1 Pending Reassignment VIEW
0 Invitation Sent VIEW
0 Closed VIEW
0 Completed VIEW
Active Leads by Source
Requests submitted through BeAScout
Manually entered: Joining Night
Manually entered: Individual Referral
Manually entered: Other Source
Invitation QR - Pack 3785
Invitation Link - Pack 3785


Lead Source
Lead Source:
Lead Source
1
Parent / Guardian / Volunteer Information
First Name:
First Name
Last Name:
Last Name
Suffix:
Choose Suffix
Email Address:
Email
Phone Number
Phone Number
Country:
USA
Address Line 1:
Address Line 1
Address Line 2:
Address Line 2
City:
City
State/Region:
Choose State/Region
ZIP Code:
ZIP Code
2
3
SAVE AND ADD ANOTHER
SAVE
SEND APPLICATION
Pack 3785
Application
Invitation
Reports
Bulk Upload
SELECT ORG LEVEL
RELOAD
Copy URL
VIEW COLOR MATRIX

INVITATION MANAGER FOR THE JSN

PROS

Efficient

Can send applications immediately

Names are easily legible

Mistakes are minimal

CONS

Must have a computer

Must have the ability to access the internet

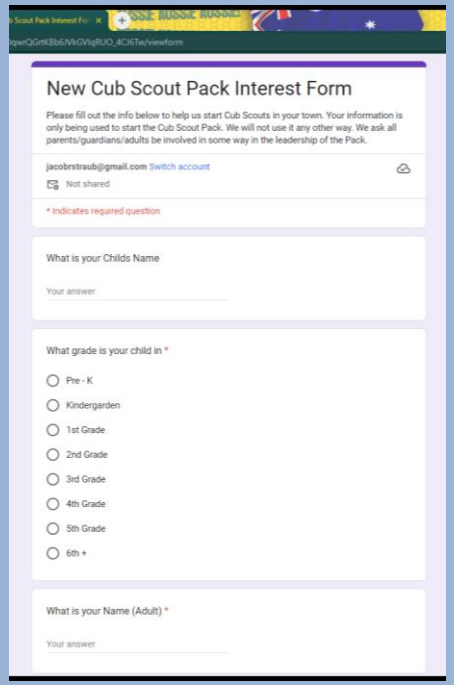
Not the fastest way to sign people in

USING GOOGLE FORMS FOR JSN

If you are unable to use the invitation manager, or are more comfortable using Google's tools, you can do similar tasks in Google Forms

STEPS:

1. Create a form with basic contact information
2. That form exports into a google sheet for further manipulation
3. You can also take that link and turn it easily into a QR code for people to scan with their phone upon entering



New Cub Scout Pack Interest Form

Please fill out the info below to help us start Cub Scouts in your town. Your information is only being used to start the Cub Scout Pack. We will not use it any other way. We ask all parents/guardians/adults be involved in some way in the leadership of the Pack.

jacobrstraub@gmail.com Switch account

Not shared

* Indicates required question

What is your Childs Name

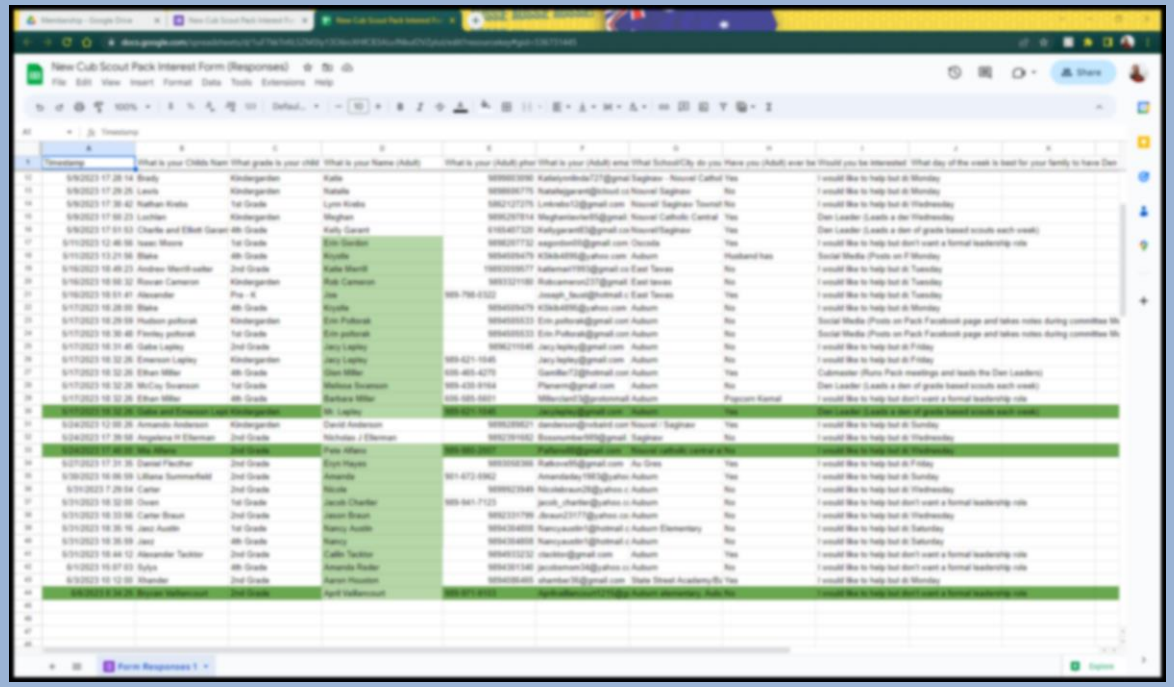
Your answer

What grade is your child in *

- Pre - K
- Kindergarden
- 1st Grade
- 2nd Grade
- 3rd Grade
- 4th Grade
- 5th Grade
- 6th +

What is your Name (Adult) *

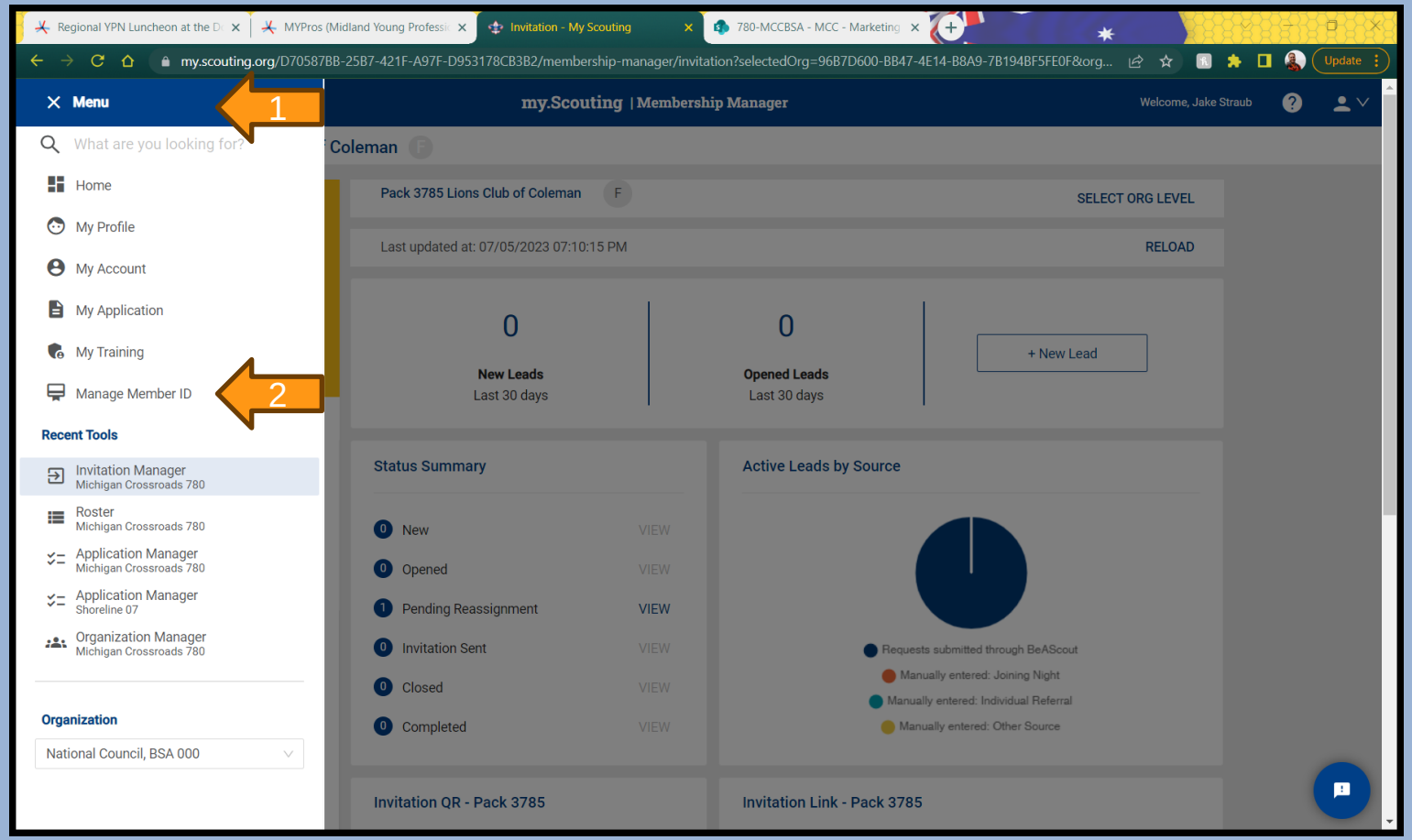
Your answer



New Cub Scout Pack Interest Form (Responses)

MERGING ID NUMBERS/ACCOUNTS

- Each person has a unique BSA ID number that is tied to a my.scouting.org account
- Sometime more than one ID for a person is created, either by accident or through normal processes
- If you have even been a member of another council, you will have two ID numbers
- You may have created multiple ID numbers if you:
  - Forgot your my.scouting.org password
  - Apply to join another Unit as a “new” person rather than multiple or transfer
  - Have left and rejoined Scouting


Regional YPN Luncheon at the D
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Invitation - My Scouting
780-MCCBSA - MCC - Marketing
my.scouting.org/D70587BB-25B7-421F-A97F-D953178CB3B2/membership-manager/invitation?selectedOrg=96B7D600-BB47-4E14-B8A9-7B194BF5FE0F&org...
Update
Menu
1
What are you looking for?
Home
My Profile
My Account
My Application
My Training
Manage Member ID
2
Recent Tools
Invitation Manager
Michigan Crossroads 780
Roster
Michigan Crossroads 780
Application Manager
Michigan Crossroads 780
Application Manager
Shoreline 07
Organization Manager
Michigan Crossroads 780
Organization
National Council, BSA 000
my.Scouting | Membership Manager
Welcome, Jake Straub
Coleman
Pack 3785 Lions Club of Coleman
SELECT ORG LEVEL
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RELOAD
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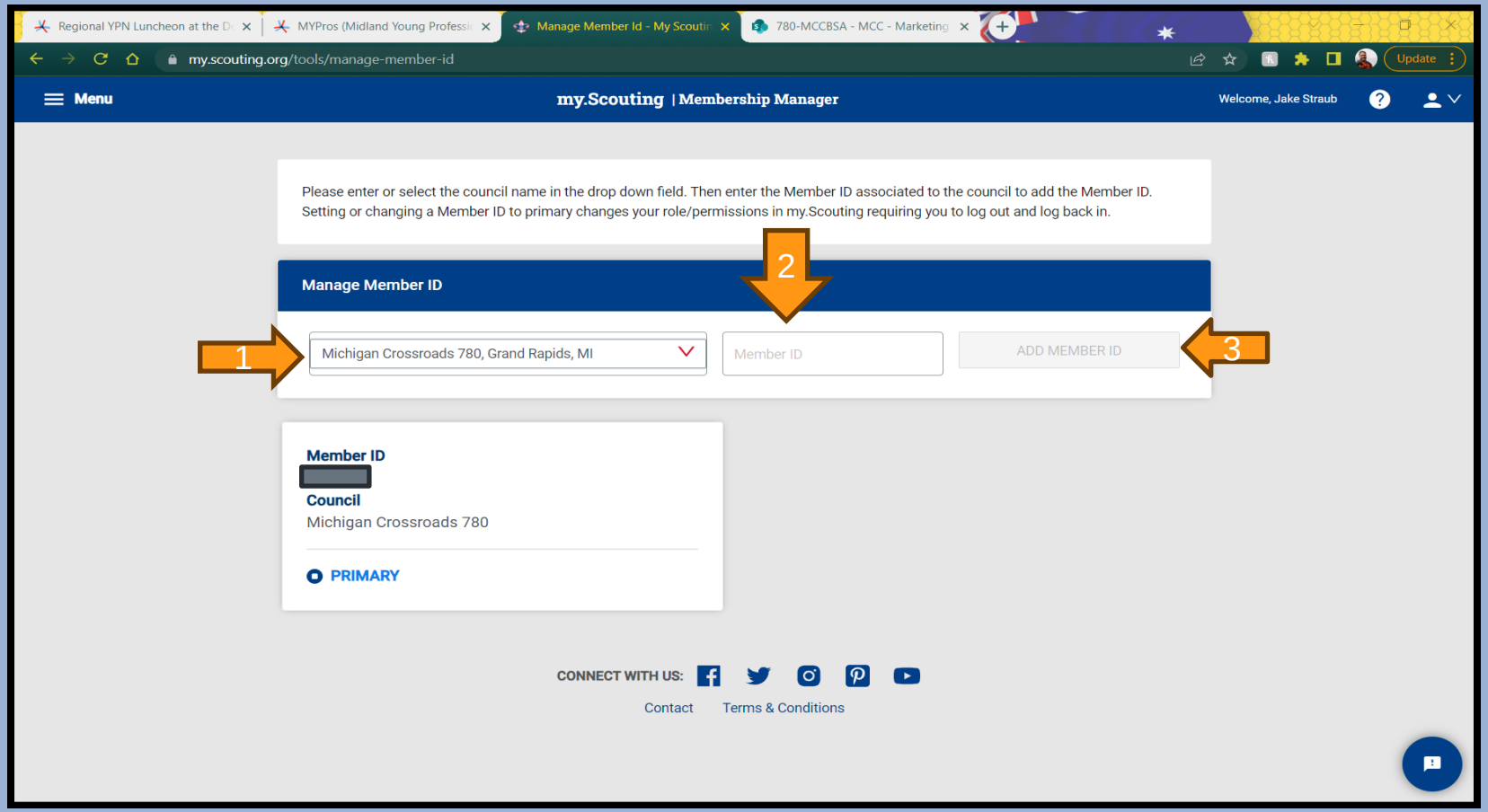

BOY SCOUTS OF AMERICA®
MICHIGAN CROSSROADS COUNCIL

HOW CAN THE COUNCIL HELP

Your District Executive and even some more volunteers can help you with my.scouting.org in many ways

- If you or another person forgets or is locked out of their account, we can reset passwords
- If you accidentally created another account and ID number, we can merge them (if you are having trouble)
- Guide you through different steps along the way – If you have questions about systems or process, please ask!
- Reassign leads and applications
- Turn BeAScout Pins on and off

HELPFUL TRICKS AND TIPS

If you need help or are unsure of something please reach out to your DE – keep in mind not all professionals have the same level of access

When using a digital sign in sheet, it is important to send applications quickly

If you do a digital sign in please keep the following in mind:

- Do you need technology
- Do you have access to the internet or phone service
- Do you need to print a QR code before hand

Questions?

AUGUST JSN TRAINING

The Great Lakes Bay Region will be hosting an August Join Scout Night Training at the Auburn Office, Topics to include:

- Sample JSN
- Do's and Don'ts of Fall Recruitment
- Pick up your Yard Signs and Flyers!

Your local District or Field Team will also have a Fall Membership Kickoff near you!

LAST MINUTE ITEMS

NYLT

Mac Rendezvous

Oscoda Camporee

Merit Madge College Presented by Dow Credit Union

Popcorn Kickoff

Scout Day in the Park – October 7

THANK YOU

BOY SCOUTS OF AMERICA®
MICHIGAN CROSSROADS COUNCIL