**BBBSEM Team Meeting 9/21**

**People Present:**

* Spencer Friedman
* James Stevens
* Selvana Abdelmesih
* Meredith Greayer
* Sankalp Koripalli
* Gabriel Davis-Hollander

**Meeting Goals:** Brainstorming meeting, as client has not responded and access has not been provided. Much of phase is dedicated to internal research; ***let’s brainstorm what we might need for research/review phase and what questions should be ready for next client call.***

**What to do before next meeting (9/26)**

Someone is assigned to each of the following software tools to come back with research:

* **Acuity** – Meredith
* **MogliSMS** – Selvana
* **FormAssembly** - Sankalp

**Reviewing the SOW**

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| **First Contact-Match** | **Software Tools** | **Communications Audit** |
| Process:   * Website: Volunteer fills out form and sets up interview * Communications for Forms and Interview Information   1. Manually set up by employee of BBBSEM   2. Based on time to interview (commensurate with how far away the interview is)   3. Forms include background check, referrals, etc. - *What is the timing of these? When do they actually review this?*   4. No way to update on status due to confidentiality reasons * Interview: Psychosocial interview * Family – ***not a ton of information; more to learn***   1. How similar is this to volunteer? | Acuity – Scheduling Tool   * Requires manual set up for someone to be the interviewer *and change the status*   + Issue: Easy to get lost, backed up   + Possible Point of Contact (POC) - Rebecca Ober * For people who select “I would like to talk to someone at BBBSEM”, what is the process like? (Option for question *Are you able to commit to becoming a Big for 12 months?*. Other options are “Yes” and “No”)   Mogli SMS   * Plugin to Salesforce * Some aspect to automation * 150+ templates that they have, only use about 6 * ***Goal:*** Consolidate, Modernize   Salesforce   * Volunteer information is stored * Where templates are stored   + How they are added/deleted?   + Documentation (Turnover – how people are informed)   FormAssembly (External)   * User data storage * “*The middleman between volunteer/families and Salesforce” - Selvana* | Interest --> Big   * Interest Form * Changing:   + Outreach up to interview   + Follow up with interview time, referral forms, and BC forms * Post-Interview   + Needs work   + *Ask to take part in an interview to see automation?* * *Question:* How does BBBSEM compare to other groups of BBBS across the country * Continued communication: (1) What happens? (2) How are both parties introduced? |