**Attendees:**

* **IUCG:**
  + Spencer Friedman
  + James Stevens
  + Selvana Abdelmesih
  + Meredity Greayer
  + Sankalp Koripalli
* **BBBSEM:**
  + Nick Ramos
  + Rebecca Ober
  + Terry McCarron, Chief Program Officer

**Takeaway/Synopsis:**

Synopsis:

* IUCG introduced organization and provided a slide deck overview.
* IUCG to interview volunteers and families for suggestions on outreach methods.
* BBBSEM is open to testing recommendations in a Salesforce sandbox before larger implementation later this year.
* They use various tools like Acuity, FormAssembly, Mogli SMS in addition to Salesforce to manage the interview and matching process.
* Data from interviews is stored in Salesforce and custom match objects are used to pair volunteers and youth.
* Automated Salesforce communications are used to notify volunteers and youth of next steps.
* BBBSEM is transitioning from Salesforce workflow to Flow but has outdated language in templates.

Action Items:

* BBBSEM to provide IUCG view-only Salesforce access or a project-specific sandbox.
* Ensure IUCG access to other platforms like FormAssembly, Acuity, Mogli SMS.
* IUCG to conduct volunteer and family interviews for outreach suggestions.
* IUCG to review current post-interview communication templates and consolidate redundant ones.
* IUCG to propose new communication templates to modernize language.
* Test recommendations in sandbox before larger implementation.

**Notes:**

IUCG Introduction

* IUCG introduces itself and the background of IUCG
  + Refer to this slide deck for details: [01 Kickoff Meeting Deck.pptx](https://umass-my.sharepoint.com/:p:/r/personal/isenbergucg_umass_edu/Documents/BoxData/IUCG%20Intranet/Projects/Fall%2023%20Projects/Big%20Brother%20Big%20Sister%20Eastern%20Mass/07%20Deliverables/01%20Kickoff%20Meeting%20Deck.pptx?d=w368da62514f24811a33d21cedf709d65&csf=1&web=1&e=a6anWm)
* Nick Questions
  + We interview both volunteers and families – we are looking for suggestions on reaching out/interviewing both parties
  + When it came to the Design Phase, it will depend a bit on our capabilities and what our status is. It’s a really busy fall and we don’t want to bring in too many changes in this time. The implementation will happen more later in the year, but we just want to keep a common understanding with this.
  + I envision at the least, there will be a sandbox where we can just learn
    - Wants to do implementation later , would “love extra pair of hands”
      * This is a good opportunity for us to provide them the resources to complete implementation in the future
* Terry McCarron
  + We want to be pragmatic with this project. We have the capacity in Salesforce to AV test strategies. We would love to use these tools to find ways to test your recommendations, make sure they work well. Ultimately, we are going to try to put your recommendations in front of a live audience. We’d like to compare these in front of a life audience
* Rebecca Ober
  + We definitely want to test out your ideas throughout the project

IUCG Questions

Refer to list of questions provided by Selvana: [Client Call - Initial Questions.docx](https://umass-my.sharepoint.com/:w:/r/personal/isenbergucg_umass_edu/Documents/BoxData/IUCG%20Intranet/Projects/Fall%2023%20Projects/Big%20Brother%20Big%20Sister%20Eastern%20Mass/02%20Research%20%26%20Team%20Notes/Selvana/Client%20Call%20-%20Initial%20Questions.docx?d=w7a3b832380694c369fc4c73295199826&csf=1&web=1&e=DueTPY)

**Spencer**

* **What is the plan for us getting access on Salesforce?** 
  + **Nick**: We can give you either “View Only” access to the database so you can observe *or* we can make a sandbox specific to the project, that way you get a bit more of a place to test your recommendations. We also wouldn’t have to dedicate 5 of our licenses to manipulating this
  + **Terry**: The onboarding process to our organization also has interplay between Salesforce and FormAssembly/Website. So we also should make sure we have access to those resources. Acuity, our scheduling software, might also be a help. Mogli SMS is housed in Salesforce, so you would get access in the sandbox
    - Formasselmbly and acuity are not housed in salesforce by mogli SMS is

**Pre-Interview – First Contact (Meredith)**

1. **What process, tool and resources are used to assign an interviewer?** 
   1. Rebecca: We use the tool Acuity to set scheduling and in that tool, we get “hours” and “limits” for each person. This includes links for specific programs people may be interviewing for. We put limits on the number of interviews a person can take in a week. It’s pretty segmented by program type and program site, in addition to region.
2. **What steps are taken internally after a volunteer schedules an interview?**
   1. Rebecca: Once the interview is scheduled, we have to go in and book the interview, which Is done manually. We change the status and communications are sent out. They automatically get an email with the interview information and forms to fill out. Texts and emails are sent as a follow up. Depending on how far out someone is booked, they might get more communication (Communication is commensurate with how far away the interview is)

**Outreach Process (Sankalp)**

1. **What kind of data is collected during the interview, where is it stored, and how is it used to make matches?**
   1. **Terry:** The data is submitted into their SalesForce record. Your assessment (interview) record, your background check, identify verification check, >=3 reference check, and some things like “high or low risk individiduals” or other cultural aspects are stored. We collect their preferences, which may be reflected in your application. We have a system in Salesforce that helps pair these matches; custom match object where the match lives.
2. **What does the current post-interview process look like and which platform is used to notify the volunteer? How is the Little notified?** 
   1. **Terry:** We use Salesforce automations. Our goal is to have people processed and paired in 14 days. It takes a bit longer in the fall because of a surge in interest. Salesforce sends out memos on weekly or biweekly basis to interested individuals. We don’t want to tell people *what stage in the process they are in* (to keep people like references protected), but we send out information and our staff also have outreach
      1. Basically, weekly Salesforce-produced message and occasional personal outreach by staff

**Selvana**

1. **What difficulties did you encounter while utilizing Salesforce workflow, what was resolved and what wasn’t through the transition to Salesforce Flow?**
   1. **Nick**: We are not fully transitioned yet. Still quite a few Salesforce workflow was not transitioned completely – it takes time and we’re trying not to insitute too much change at once. We’ve learned a lot when it comes to what types of flow to use and how the messaging is output once it is used. Flow overall is easier to understand and use, but we have encountered our fair share of challenges.
   2. **Terry**: We upgraded to Flow as necessary maintenance – our old flow was antiquated. But we did not address language/messaging since 2017, when we made the initial move to Salesforce. The language is untested and pretty old.
   3. **Nick:** Yeah, we’d love to shift to new templates to address the antiquated language. We also have some redundancy – text messages that say exact same thing as some email messages. Rebecca knows best, we have 150 templates, and we only use about 6. Some consolidation would be very good
   4. **Rebecca:** Yeah, language is one of the biggest issues I’ve seen. Any changes that happened were manually made by me, so I’m very open to suggestions.