**Rebecca**

Rebecca has been here for 11 years - wasn't drawn by mentorship aspect. Moreso was interested in working w/ volunteers and families.

Had worked with nonprofits since leaving college.

Works in CRS (Community Relations) Department as a Manager (One other person, Denise). One of the first people to interact w/ families and volunteers. These are for people who don't know about the agency. Has phone calls for volunteers and families. Gives overview, answers questions, and helps schedule interviews. Talks to every family who comes into the program.

Has a phone call w/ every family that comes in (touchpoint for both volunteers and families). Likes hearing about kids, how to support families, **and the matching process**.

Also works on scheduling “Home Visits” with the child to help with the matching process. Also, “WEEDS OUT” people; “we don’t want to waste time for anyone doing the interview”. Doesn’t often have to stop families, only if they are moving or if they are receiving services for traumatic events.

As manager, focuses on getting in touch with people who fell out of contact. Tries to ensure that families and volunteers show up for the events or home visits – if a volunteer doesn’t, then its over for them.

Tries to figure out where they need volunteers, how to balance it with many parties. Keeps track of matchmaking. Loves talking to parents, supporting them, etc.

**Spencer**: What kind of communications specifically do you and Denise send out?

* For volunteers/families, we use email, texts, and phone calls. For emails and texts, we use workflows, which are automated, or individual messages. For volunteers, starts out with an email and a text, which encourages them to use Acuity to set up a message.
* For volunteers, the workflow they use is called VIP. It entails 7 days of active outreach and on the 10th day, they get a closure email.
  + Learned that if you don’t get a hold of them quickly, you’ll never get them
* They will usually get 2 phone calls – one the next day and the other a few days later. Usually, these are cold calls (not scheduled beforehand). These are designed to push them through the process. **Generally, a lot of voicemails**.
* Similar for families, but over a longer period of time. Workflow is extended over 28 days, with many initial messages, but then moving to weekly messages.
  + Families can have this longer workflow because they are generally more responsive over that period of time than volunteers would be.
  + Closure email is a good push!

**Spencer:** So the communications are from inquiry on?

* Yeah once we schedule for an interview, they are put on a separate outreach that sends emails and texts to remind people of their interview and forms. The email seems personalized due to the signature at the end – and it usually is from the person who is interviewing the volunteer.

**Spencer:** From the family perspective, how much do you guys use Salesforce for those communications?

* Once we have an inquiry for a child, we have many communications. So if a child is referred by a teacher – once the child is put on an outreach, we also try to update the teacher on a workflow. The CT also does some communications with some referrals as well.
* Emails and texts for families are automated via Salesforce, so all that information lives in Salesforce. We use outreach called Covid Outreach – not related to Covid anymore, but likes the language associated with it.
* For both volunteers and families put on outreach, I generally decide if we’re going to move forward with you or not. Looks at age, location, etc. To make that evaluation of who should be put on outreach.

**Spencer:** I was going to ask – from the account we have access to, I was having trouble finding the folder with all the communications. I wasn’t sure if I could share my screen to show you what I see.

* That’s a better question for Nick. I see you don’t have access to MogliSMS, which may be a problem
* I can send you the workflows we are actively using so we have access to that

**Spencer:** Would renaming the Covid workflows and moving them somewhere else be powerful?

* Yeah – we're using so few, that while I might know which ones we use, someone else won’t know that and may be confused. That would be really helpful.
* You guys can evaluate these messages by results, wording, cadence, etc.

**Spencer:** When we went through Acuity and the scheduling process, something that came up was the pre-interview talk. What kind of questions were people asking? Do you think that having a FAQ could answer a lot of these questions?

* I don’t think we’ve looked a lot at figuring out what changes have been the most helpful. I think that when people are scheduling these pre-interview calls, we have some individual ones, but sometimes they are more general, asking what the different programs are, or something else. I think that having an FAQ or chart
* I think some way of giving people that information quickly could be very powerful
  + Definitely if it is in addition to an email, it could help

**Spencer:** Some feedback was that the volunteers didn’t even know they had forms to fill out – do you think that having something on the website could help?

* Yeah that would be really great. When we are talking to people, we can convince them to fill it out soon – but if they don’t talk to us, then this could be super helpful.