Reference formassembly form?

Where would the status update live that Terry had mentioned?

Program coordinator interview? If not, could we see what kinds of emails are sent from them?

Data on what SF ids to program type they are in?

Post Interview Questions

1. What is the best way to think of segmenting the waiting volunteers into different spans of wait time and subsequent need of engaging outreach?
   1. Based on the program type, you get a specific type of outreach
   2. Everyone gets an email if they are RTBM
   3. For community based, it is tied to specific part in the process, so they reach out free flowing when they have a person to match with
      1. Mentor 2.0
   4. For campus based, If they are recruited aug or sept, they wont get a match until oct or later
2. What is comm flow interview to RTBM?
   1. Should be a flow for every 7-10 days
   2. There is a congrats for RTBM and then an email with the profile of the match
3. What part of process takes the longest?
   1. Intent is to make someone RTBM within 15 days
   2. Interview and assessment are done within 10 days
   3. If people don’t get paperwork in or referral comes in late it can be a problem
4. Program coordinators?
   1. Average caseload?
      1. Can be anywhere from 5-6 ppl in summer to 25 currently to even larger
   2. The comms after RTBM?
      1. Most of the time just checking in with someone and writing an email specific to them on program type and location
5. What is the exact number of email communications sent out between interview and match and the respective timeline? (e.g. weekly, bi-weekly emails?)
   1. Which templates/communications are actually used?
   2. Since there are many versions of the same email, does everyone know which templates to use to ensure consistency?
6. If communication is mostly ad-hoc during this stage, what protocols exist to ensure no emails are forgotten?
   1. There is nothing formal to ensure, manager works with program coordinator to make sure emails get sent out. There is an opportunity for emails to get missed in this case, so they would love to consider a most structured approach
   2. Lack of tracking activities in salesforce, and opp for trying to add back some standardization in tracking tasks
7. Is there more standard activity during busy season?
   1. Still highly unique to person, location, program
   2. Due to their ad-hoc nature, who is responsible for sending out communications/updates during the waiting period?
8. Have there been any prior initiatives/conversation to address the issue of volunteers feeling a lack of direction in the process?
   1. There is an on-hold feature that is built off the reengagement date
   2. McK research was done on mentor 2.0, where they wait much longer
9. Do you give updates via email?
   1. It is done between program coordinator and volunteer
   2. Need to strike balance between privacy and insight
10. Reference Timeline?
    1. Reference takes variable amount of time
    2. Could be room for clearer communication that they don’t need to write an essay about a person
11. Background check
    1. Get state and out of state reference which could take 48 hrs to a couple weeks based on the data that is available
12. How do you currently keep volunteers engaged when they’re on hold?
13. What resources exist for volunteers during this stage as they wait?
14. Typically, what makes this part of the process so long?
    1. How long do background checks take? References? Other forms needed?
       1. Reference checks take a while , theyr confused about the guidelines, some take it to seriously and write ane ssay , no deadline given
       2. There is a lot of automation around reference check , minimum of 3 rferences
          1. Reference providers can fill out a formassembly form
    2. Are background checks outsourced?