**Attendees:**

* **IUCG**
  + Spencer Friedman
  + Meredith Greayer
  + Selvana Abdelmesih
  + Sankalp Koripalli
* **IUCG Alumni (currently McK)**
  + Devon Roshankish

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**Synopsis:**

**Goals of what to Finalize for next Client Meeting:**

* What are all these tools and more
* Who are the right people to go to (each for Salesforce, Mogli SMS etc)
* What we should do for next week

**Review (deliverables) (slides)**

1. Make table with 4 columns (Tool, Current uses of respective tools, Benefits and Limitations)
2. Software Tools: (Medium where it is used, Communication (predefined messages), Frequency & Intended Audience)

**Sources for Insights**: Jesse Victoroff, Terry McCahon, Salesforce Data & 3 interviews with Program Coordinators & Resident Technical Director

**To do (IUCG Project Team)**

* Create slides for Review portion on Software Tools
* Schedule meet with Devon for upcoming weeks
* Send 9/22/23 Alumni Advisor Meet Notes to Devon
* Set up Group Chat with Devon and project team

**To do (Devon)**

* Check previous files from relevant information and send to team
* Enquire with Jesse on main questions team has

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**Compiled Notes:**

Main Questions for Devon

* What was your project on?
* What areas were McK changes made?

Devon:

* Board Strategy: What direction should BBBSEM head in 4-5 years.
* Strategy consisted of 3 main areas:

1. Increase revenue from donors (without increasing costs too linearly)
2. Increase funds from banks
3. Raise penetration rate of littles with Schools and more partnerships

* Successfully Implemented: Mentor 2.0 program

**Enrollment Process Review Results:**

* Process for getting signed up was Variable, Slow and Poorly Designed (plenty of forms to sign)
* White & Asian women struggled to be matched -to many
* Deficit of male volunteers
* Majority of people to be matched were people of colour
* There was no decrease of match satisfactions of race-based matching
* Target audience is Male people of Color

**Terminology (BBBSEM Jargon)**

* RTBM - Ready to be Matches
* Big - Volunteer mentor
* Little - Mentee

Spencer Q: Are lot of processes through schools because permissions slips is through school?

Devon A:

* Sourcing of littles is mainly done through schools, not many organically
* littles are 8-13 from Elementary and Middle school
* Sourcing Process: Program Coordinator from BBBSEM (employees) - reaches out to teacher for teachers to disseminate marketing material and permission slips

**Aim: to ask for Funnel from effective up till currently for minimum a year**

Review (deliverables) (slides)

1. Make table with 4 columns
   1. Tools
   2. Current uses of respective tool
   3. Benefits
   4. Limitations
2. Tool:
   1. Medium where it is used
   2. Communication (predefined messages)
   3. Frequency
   4. Intended Audience

Sources for Insights:

* Jesse Victoroff
* Terry McCahon
* Salesforce Data
* 3 interviews with Program Coordinators & Resident Technical Director

**Extra Notes**

* Ask Terry, Aka (spelling might be wrong), for whether McKinsey parts are implemented
* BBSEM team wouldn’t mind us working with Devon and Jesse, but it's worth letting them know
* Marketing - Paid advertisements, Facebook and Instagram to attract volunteers
* Recruitments - couple of them show up to McK
* BBBSEM really prefers a/b testing - it slowed down McK processes - needed to A/b test small grammar mistakes
* Best practice to wait for around 3 days for something to land on clients calendar