**Attendees:**

* **IUCG: S**pencer Friedman, Meredith Greayer, Sankalp Koripalli
* **BBBSEM:** Caitlin McNee

**Synopsis:**

* 2 types of Matching: Community Based (CB) and Big Futures
* Forms to be filled by volunteers: Application, PIQ (not sure full form), References (3-5 people)
* Staff responsible for taking interviews do not have say on what interviews to take
* Topics discussed in interview are
  1. Motivation to join BBSEM
  2. Prior youth experience,
  3. Current Relationships and
  4. Preferences for little
* Change in aggregating forms to one made yield skyrocket from 23% --> 43% but lost ability to manage well leading to-
  + More wait times for weeks
  + Increased seasonality in demand for interviews
* On website to fill out forms, those do not have next steps to fill out the background checks

**Potential To-Do's to Consider (later on):**

* Talk to Aka on process of how individuals are tagging from the marketing/recruiting funnel
* Create a segmentation ‘Ready to be Matched’ individuals to send Newsletter
* Check up on progress on FAQ – potentially build one

**NOTES:**

**Introductions:**

* Director of Program Services - Directly leading the enrolment side
* Additionally with customer relations team - first interaction of volunteer with website
* 19 years within agency
* Joined right after college
* Been with agency ever since
* What does enrolment mean?
  + Inquiry - start of match - and then pass off to another department
  + Booking interview, go through screening process, choosing match, introducing to big and little

**Questions:**

**How is the Interview structured?**

* 60 mins - can vary of life stage of volunteer and comm style
* Over zoom - booking interview online, get calendar request, get subsequent email
* 1 confirmation interview email and 1 more email with forms - volunteer application and volunteer questionnaire
* They collect references too
* Text-reminder phone call
* They join interview - they are with 1 enrolment staff and one intern might join in to take notes and assessment
* Questions they review are
  + Motivation to join BBSEM
  + What experience do you have
  + Current relationships they have in their life, dating
  + Talking about preferences
  + Doing coaching
* Sometimes volunteers might not know what unique program is available so they let them know what option would be best for them
* They spend 5-10 mins talking about program type

**Is there any way to decipher where they are coming from and track type of inquiry?**

* Marketing/ recruiting inquiry is a major difference
* Recruiting is where they have one touchpoint before
* Big Futures is the program they are pushing where they launch matches in the fall - goal to make 300 matches
* If they come from marketing channel, they are marked as 'other'
* If they come from college, they are marked based on what college they are from
* For the types above, they get more specific interview

**How would they be flagged to what type of event they come**

* Talk to cc team on - Aka and team
* When they go to info event, they get tagged to that
* The recruiter goes and tags that person that he/she came for tabling event
* As soon as they have expressed interest
* Aka can tell how they get into the system

**There was an external survey from McK- expressed problems with program - person didn’t know that there were additional forms to fill out**

* People see the confirmation email and forget the reference
* They get asked to put a background check - 15$ per background check
* Is it cost effective to ask people to do a
* Cost of acquisition of background check on their own vs manually pushing them
* It directs them
* Forms are in confirmation email - there are 3 forms - we want them to do 2/3 forms and then in interview they can work on the 3rd or at least talk about it
* After interview they get asked to do background check
* On the website, when filling out the form, the confirmation does not include the next steps of forms to fill - should check up to add and A/B test

**How do people self-select for being willing to interview candidates?**

* They are in scheduler - they got 5 days dedicated per volunteers
* They might get 20 interviews per day
* Depending on program, we would decide availability on Acuity - Community/Big Futures
* If they are covering college,
* Staff does not decide what to take/ what not to take - reason is based on college location - program type is dependent on college

**There was a low conversion rate from inquiry to interview to match – is that still the case?**

* 22% conversion rate - it's not as bad as before - as 4-6 weeks recently - now its 43%
* On page one, they would fil in form - when they had a demographic - they go to 2nd page and- they had to navigate for 5-6 pages before booking interview
* Lot of manuals pulling out of women from system because they don’t need them anymore
* Colour is highly desired - once selected - tis 24-48 hours later, they get email to book interview - They lost many but have control over individuals needed
* Now asked very simple questions
* They were not expecting to happen - they booked 200 interviews over the next weeks but they were not the right interviews
* Lost ability to control and manage
* Not ready for the interviews
* Yield sky rocketing

**What is the current post interview outreach process? (What are the steps, What tools are used, what is automated and what is manual, how much do volunteers reach out in the process?)**

* Automated and manual outreach happens both based on situations
* They get email within 24 hours - that agency is working on application
* Later- they send another email that they are still working on the application
* They are later followed up manually is there are issue with the forms or not responding back - they might ask to interview again for the follow-up
* If perfect world, they are only getting automation
* They should complete this within 15 days -
* Once application is done, they get processed to 'Ready to be Matched' - a success email to congratulate is sent
* Automated email will include link to Acuity for follow-up call
* If hard time getting references (would be 3-5), that might extend the process
* Application, PIQ, References - docs
* Everyone has 3 standard family references
* If they have youth service experiences (40 hours or more)

**Do people often respond to automated email?**

* They would most likely ask why it's taking so much time
* It's like a 50-50

**Someone started their own personal newsletter - what are some ways to engage people?**

* In Big Futures, there is benefit with sending newsletter
* In community based, everyone is in different situations
* Caitlin doesn’t like building community with newsletter and more because it might set unnecessary expectations that they might become
* Maybe tagging selected people (who would most likely ready to be matched) to newsletter -

**How long from Ready to Match --> Finally matched**

* In Community based (CB) - they get written profile on little - and then get on call to discuss little
* People might get new preferences and then they get pushed to get a new little
* When everyone agrees - then the match meeting is set
* But now is takes too long, they might be not too consistent with keeping
* Further away from initial enthusiasm, they are more likely to lose staying for all 12 months and losing training

**Is there an issue for not getting interview leading to people dropping off?**

* Assumption is people drop off because people are not waiting for too long
* Cost per match- they must stay between reasonable cost per match
* Staffing will get overbooked, and people lose
* Averages are 6-7 matches per month
* Flip side is one staff leaves or goes into different role, department is risky to staff turnovers
* Higher head staff might absorb the interviews based on when people leave
* Now staff is trying to hire many part-time interviewers for volunteer assessments
* Goal is to get 5-6 parttime interviews
* they are down to 2 enrolment staff - they know that people don’t want to wait too long, but it can be

**Do other agencies experience difference in seasonality**

* Yes! Every agency to some degree experiences some kind of seasonality
* They have tried spreading out recruitment- it NEVER works
* They might make the Big Futures/Community Matches till late march instead of fall
* They take pride in their retention rate because its stronger in the fall - they have better chance to come back once again
* Healthy competition with agencies but people from other agencies don’t help agencies too much
* BBBSEM agency is a lot more progressive than other agencies

**How does COVID continue to affect these communications, as noted on acuity?**

* Carry over from Covid Warnings
* They change their language a lot especially during Covid
* She found couple of outdated forms - some messaging is not actually on point

**How is the current interview process to book for the Little**

* Rebecca and Denise - taking to every family which are interviewed- links from Acuity should lead to
* Q-s about volunteers /study abroad/ travel for work- Questions are about clarifying questions

**Do they want to hear another voice or?**

* They want an FAQ, or they were in the process working on it
* Maybe add this video to hear from them

Spencers Notes:

**been with the agency 19 years**

Enrollment team

Customer relations team

* First interaction wtih website, staff, booking interviews
* Talking about user experience

Her role

* inquiry to start of match
* Inquiry,

Interview itself

* 60 minutes over zoom
* Book it online, calendar request
* Email first is confirmation, two forms to fill out
* Show rate is difficult in certain times of the year
* 1+2 people from BBBSEM over zoom
* Sometimes, priorilizing booking volunteers and some might not know what different program they are specifically shooting for

Where people are coming from

* Marketing or recruiting inquiry
* Big futures pushed rn over community based
* College student goes through independent route based on form

For recruiting

* CE team would know this better
* Inquiry starts when someone wants to go to an event
* Recruiter tags them at a tabling event

ASIDE is it worth it to ask for background check after interview

POSSIBILITY

* Add message to tell people to check out for the email forms

Conversion rate

* Currently really good but was bad last year
* Used to have on page 1 of the website, multiple pages to get to booking the interview. lost a lot of people because they were being told they were not a good fit

How do people submit to be able to volunteer

* 5 days for volunteer for 4 slots per day (20 slots)

Do people drop off because they can’t interview soon enough?

* Based on seasonality
* Cost per match is best metric, goes up if you have too many enrollment staff
* 6-7 matches per month per enrollment staff
* This year, bringing in part time interviewers
* In the future bring on the right number of part time staff to absorb increase in interview requests

pre interview musts

* PIQ
* Application
* References aren’t a must
* Professional
* Personal
* Family
* Relationship >1 year
* Youth experience

Post interview outreach process (15 days hopeful)

* automated follow up
* 1 text immediately after interview, “Great to meet you”
* Emails with we are still working on stuff
* Perfect world only automated
* Manual follow up basd on nature of interview
* Background check check
* Referrals
* Saleforce automated emails
* Mogli texts
* If taking extra long, we have hopefully reached out manually

Newsletter

* For volunteers that did not get used, not happening anymore

Big futures

* Bit more worth getting community feel because they are meeting at same school
* Don’t like idea of building community before because some people get closed due to concerning material

RTBM-> Match (Community based)

* Haven’t looked at that til recently
* Used ot be a week max
* Get profile of littles as volunteer
* People will opt out for various reasons when they have preferences
* Taking too long in RTBM-> Match process

The Preinterview 10 minute chat

* Rebecca Ober
* Calls are being scheduled
* Mostly coming from marketing
* People want a little extra context and personal circumstances
* Last year realized gave people option to call too quickly
* FAQs would be helpful, but people really want to talk to someone specifically