**Attendees:**

* **IUCG**
  + Spencer Friedman
  + James Stevens
  + Selvana Abdelmesih
  + Meredith Greayer
  + Sankalp Koripalli
* **BBBSEM**
  + Terry McCarron
  + Nick Ramos

**Synopsis:**

* IUCG offered space for Terry and Nick to share their individual history at BBBSEM and motivations in working for the organization
* Spencer asked about mentoring and mentoring norms among BBBSEM staffers
* Nick and Terry explained who wears the technology-oversight hat and why it has become a somewhat neglected workstream
* Before presenting deck, Spencer clarified what they’d like to see out of this project, their goals, and preferred medium for the final deliverable
* Process flows deck presented, allowing commentary from Nick and Terry
* Terry expressed concern for experiment findings and Nick offered to find IUCG submissions in their database to see if there were any errors
* Shifted to look at funnels and discussed mediums for recording interest, capturing potential Bigs, and their different outreach methods (VIP, LinkedIn, referral, etc.)
* Final discussion centered around BBBS nationally and other sectors, revealing that BBBSEM is the most experimental or rebellious; Terry offered to reach out to other branches if there exists some useful guidance for IUCG interview

**Next Steps:**

* Spencer to email:
  + IUCG’s unanswered questions
  + Requests for contacts
  + Interest form submission data
* Terry to offer contacts at other BBBS offices
* Nick to provide BBBS-side insight in IUCG interest form submissions

**NOTES:**

**IUCG Introduction**

* Terry is a Celtics fan, the history of Boston maps well to the Celtics, close friend at UMass Boston who’s a sports historian — involved in sports activism and sports mentoring
* Spencer wants to take the beginning of the meeting to get to know BBBSEM contacts; “what got you into this organization
  + CPO, 20years at BBBSEM, has a mentee who’s 33, in charge of whole service delivery process, 70 people in organization
  + How do we get interested people involved in our program
  + Enrollment team, recruiting team, case management
  + Has to say no in about 1-2 out of every 10 applicants
  + Briefly a high school teacher, master's in education, loved being in schools and relating to students, didn’t love delivering instruction, hard to mentor as an instructor, also a high school basketball coach, got a better sense of student world view through that
  + Friend at BBBSEM, loved it, “very Irish in that I love being miserable” - hard place to be
  + People can’t give back what you give to them, even volunteers
  + Became the “catch all” for everything because he’s got a “long tail”
* Anyone else has a mentee on staff
  + 20-30% mentors, CEO, alumni group
  + Work is heavily administrative and not glorious like in mentor/mentee relationship, being a big allows you to feel the mission
  + Great consultant last year: “it’s kind of like a world within a world” - once you’re in, you’re receiving things and feel the love
* What does mentoring mean? What do those mentoring relationships look like?
  + Mentoring takes on the shape of what the young person needs, unlike school where you fit the kid to the experience
  + Randomized control trials, mentoring does work, more likely to do X, Y, Z
  + Parents would give their kids a mentoring pill
  + The field of measuring impact has not caught up with the actual practice of mentoring (in talks with professors), can’t measure kids, the modern concept of measuring impact is asking “how do you want to be changed by this experience?” and finding a metric to capture whether those goals are achieved through mentoring
  + Good outcomes for mentors, studies on happiness say care for other people boosts ego
* Nick, what do you do, why are you involved?
  + Oversees the HR side, compliance, DEI, culture, some aspects of technology, history in HR in for-profit
  + 4 years in the agency, right before COVID
  + Raised in Utah
  + Had a good friend who’s a big, brought little to fourth of July barbeque, got involved
  + DEI is core at this agency, limiting inequity both internally and externally
  + Used to have someone else who oversaw technology, has since taken over this role, tries to think about the intersection of all tools, some departments own certain tools, Salesforce at the center, records are stored there
  + Some technology contractors, IT support, more hardware, server part of the house, upkeep and maintenance
* Salesforce expert
  + Definitely not, Terry knows Salesforce best
  + No expert – Terry, figure out how to modernize, no dedicated IT expert or someone who can fit this into their day-to-day
  + Documentation of what’s going on, in and of itself, is great, antiquated map of how to use the system, recommendations on how to improve would be great
* What would success look like for you in the project?
  + Different people come in, who’s coming in, by what channel, key identifiers, pushing them into system, getting interviews, document that outlines coherently the process map with weaknesses identified
  + The presentation of what we do, presentation on language, is the language accurate, mistakes? Formatting? Make sure we are catching people’s attention. Make a list of these action items
* Presentation of this information, more visual? Word document? What would be the most helpful medium?
  + Some type of tracker, “these are the specific steps that need updating” (excel, word)
  + Would love to produce a manual to everyone on the team, how everything works and noting room for improvement
  + Scenario where IUCG presents to in front of leadership, screen shots, process map, current to intended future state, impact of changes to be made (Powerpoint)

**BBBSEM Process Flows Deck**

* Spoke with Devon, summary on process flows, and our quick experiment, talk through that in case we are missing something there
* Each person in project team, LT, and JAs tested interview form, captured emails and calls received, what was the communication within the span of the week - on average 3 follow up emails, 1 follow up call but nobody on other side
  + Bombing hard – Terry, we’re shearing people all over the place, this looks bad
  + Nick wants to look in form assembly for information submitted on their end
* Is there a way we can run a test person entirely through the experiment
  + Sandbox copies the environment but not information, can walk through test subjects and see what happens
* Form assembly error, does that happen to others?
  + We wouldn’t know. Maybe this is happening to others. The end user sees errors. People who want to apply might be getting kicked off. Likely isn’t giving BBBSEM a second chance.
  + Used to have it that the error would kick ot BBBSEM and they could finish the form fill out, switched to it informing the user instead (Understand why they did that, and whether we should switch back to BBBSEM seeing the error)
* Marketing/Recruiting funnel, any feedback?
  + Referrals, marketing, recruitment; 10% of people get referred
  + Most people get the same set of communications, some get VIP outreach, don’t want to necessarily do that with people they’ve had live interactions with
  + Create right filtering for who gets what communication
  + Everyone is on VIP right now, had a lot of success with their online page, but generally volume has been high
  + Manually enter some inquiries, like on Cape Cod
  + The person that is referring is submitting the contact information for them
  + There’s lots of different types of recruitment, tabling at colleges, LinkedIn outreach (lot of success)
* Other BBBS? Is what we are covering unique? Should we contact other sectors?
  + Outliers as they use salesforce, nationwide uses match force, no automation, unfriendly
  + Most organizations are behind BBBSEM
  + Terry offered to ask national orgs, who’s really crushing it?
  + Stubbornly innovative; Boston is the most competitive non-profit market
  + “Thorn in the side of national affiliate” always trying to be different and rebellious

**~~Initial Questions~~**

**~~First Communication -> Match~~** ~~(Spencer)~~

~~Do we have access to the external survey about volunteer dissatisfaction that is mentioned in the SOW?~~

~~Have there been any steps taken since the McKinsey engagement?~~

**~~Software Tools~~** ~~(Meredith)~~

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

~~Would there be a possibility for automation of scheduling interviewers?~~

~~What kind of documentation exists for Standard Operating Practices (SOPs) on how to use all the tools and how to make regular changes/updates?~~

**~~Communications~~** ~~(Selvana)~~

~~What is the current post interview outreach process? Who should we talk to about it?~~

~~What kind of information is distributed leading up to an interview? Does this information contain anything to help interviewees prepare?~~

~~What is the process after a person has been approved for a match? How are both sides notified?~~

**Next Steps & Closing Thoughts**

* Questions to be sent after meeting for answer online or in next meeting
* Interview with Aka and Caitlin, anyone else?