**Attendees:**

* IUCG
  + Spencer
  + James
  + Meredith
  + Selvana
* BBBSEM
  + Nick
  + Rebecca

**Notes:**

Spencer:

* Who was running the Employee Breakfast last week and why was it in Boston?
  + So the BBBS organization overall is designed to set the major policies and brand for the entire organization. But the day-to-day work is done by the individual locations (Eastern MA, Western MA, etc.), so this event was ran by us, but we invited people from National (double check this).

**Meredith:**

* **Rebecca:** So in my work stream, I’m focusing a lot on the flows between Inquiry and Interview. I wanted to focus a lot on the pre-interview forms that we send in the confirmation email, which includes referrals, questionnaires, and more. With regards to the questionnaire, how important is that to be done before the interview? What value does it provide in the interview? [Cites call w/ Katelyn and her beliefs on how the forms might make them impatient and therefore less interested]
  + **Rebecca**: So we did some restructuring over the last 6 months to discuss the interview in general. It used to take an hour and a half, and that itself is a really long time. We figured that it might put a strain on our enrollment team and the volunteers. So the team decided to reduce the interview to an hour, and use that questionnaire to supplement the questions.
    - And this definitely has made a huge difference.
    - Certainly when folks cancel interviews, one of the reasons is that they *haven’t* gotten the forms done on time.
  + **Rebecca:**The questionnaire outlines topics like preferences and other information that used to be in the interview. There’s nothing we can take out to make it shorter. THe options are to do it on your own time or to do it with us, where we will fill it in during the interview
  + **Rebecca:** We have seen an increase in show rate, the number of interviews booked, etc.
  + **Nick**: Something interesting to look at is the timing we send it. I feel like we want to send it ahead of time, just to give the heads up, but I’m curious about some timing.
  + **Rebecca**: I wonder if there’s a way to alter the language or the method we’re sending the forms as well. Can we tell them what’s coming? How do we best prepare them or provide context?
* So the information is necessary no matter what – does it have to happen before the interview or before the match?
  + **Rebecca**: From enrollment side, we want it done before the interview, that way if there’s any questions or concerns from the form, then we can get more context or time talking about it.
* What if, during that first interview, you scheduled a 30 minute follow-up one a week later and during that week-long window,
  + **Nick**: It might defeat the purpose of having only a 1 hour long interview, if it isn’t done by the following week. But I’m curious if there’s a way we can tell people that we *want* them to come to the interview even if they didn’t fill out the form. “If you got to it, great, we appreciate it – but if you didn’t still come”.
  + **Rebecca:** Yeah, there aren’t a lot of forms to fill out. It might take 5-10 minutes in the beginning of the interview to complete them, but people don’t know that’s an option
* With regards to the referral form, does that need to be done before the interview?
  + **Rebecca:** It’s super helpful, because we have to do the outreach to the person, but I don’t know if it’s required to (helps w/ efficiency, might not be required)

**Spencer:**

* We only had insight into when we can schedule interviews – it seems like most people stay after the interview. Does the application pertain to the interview process itself or the process following the interview?
  + **Rebecca:** Good question for Enrollment Team. Is it required? Not sure. It definitely helps if there are any automatic disqualifiers – but again, I’m not sure if it’s needed. Something to investigate is the language related to this – we don’t think this takes a lot of time for the person completing the reference, so if we explained this to the volunteer, could that be helpful?
* Could we experiment with giving an *expectation* for how long the application might take to complete? Something like “Take 30 minutes to fill out this form”. We could put this in the application instructions, emails, etc. Would that be valuable from a language perspective
  + **Nick:** 100% - definitely something that makes sense. It would prep people mentally and provide a bit more context to what the process looks like. To Rebecca’s point, a lot of people don’t realize that they are expected to do those things, so they feel like it’s been dropped on them. From there, they feel a bit stressed and might be less likely to go forward in the process. It’s all about setting expectations.
* I know Rebecca that sometimes getting on the phone can help. Can you detail what you tell them?
  + **Rebecca:** I don’t talk about the interview a lot, but we just want to learn about their life. I tell them that they *will* have to fill out additional forms (references, background check, application, questions about you, etc.). I tell them that we do this to *expedite the application process*. Defining what they have to do seems to help
  + **Nick:** Have you all seen a copy of the pre-interview questionnaire? (Yes)
* I’m curious if it would be valuable to reformat some of our documents in more simple terms. Telling them what *we mean* by application or reference, so people don’t make assumptions!
  + <https://bbbs.tfaforms.net/5002799>
  + **Rebecca:** Something like that could be really helpful. That makes it so people don’t get surprised or anything.
* In terms of the delivery for all of our information, we have until Dec. 8th to finish this project. If we wanted to make recommendations related to email templates, what’s the best way to give it to you?
  + **Nick:** Updating things on the sandbox could be done, that way we can copy them, but I don’t think that’s the best thing to do. What we need is documentation as to what these are, and that would get lost. Put them into a document, that way we know the *purpose* of making the change, when they’re used, etc. Basically, we don’t want to make a bunch of changes without explaining why we did those. So just make a Word Doc with everything you recommend, why they’re here, the process, etc.
  + **Nick:** No need to follow a specific template, but we’ll send over some brand materials/guidelines (font, colors, etc.) that way you can tailor it or give some formatting recommendations.
    - **Spencer:** Basically, we can use the BBBSEM colors and formats
* Is it worth having a collection in a folder with each individual email template?
  + **Nick:** Up to you – the one thing I will say with email templates is that we currently use all classic email templates, which look a little dated. I’d be curious if moving over to a lining template could make it look better? Use the sandbox to see how formatting changes could make it look better.
* In terms of post-interview standardization, what’s the best way we can present? Use Sandbox?
  + **Nick:** If you build a flow that works in the Sandbox, I can then clone it into our system. The key thing to keep in mind is that anything being referenced in the flow are going to be documented.
* When we met with the consultant, she had some feedback on some of the marketing materials. We reached out to Kara on how those materials are created, but we want to make sure we’re not overstepping.
  + **Nick:** Are the recommendations general? Or do they relate to specific ads? (More particularly best practice). I can set up time with our marketing team and you can talk to Terry. If they say yes, put it in the documentation.