

SCORE Executive Committee Meeting 12-14-23

SUMMARY:

- Beaver Creek High School has reached out to Allen and requested to partner with SCORE to establish the annual high school business pitch project. Steve will provide Chuck with a revised SCORE budget putting down like 8,000 for this project just in case we get stuck for some other expenses that we don't know about related to Allen's project.

Chuck and Art are going to follow up with Allen about his school April pitch competition project. So that number one is the thing we'd have to see a whole big infrastructure underneath item number one, multiple schools, who they are, what if they've agreed upon all of them on ground rules you know the pitch has got to be kind of the same and then we become the regional thing. So, a lot of stuff has to be agreed to way before us.

- Next Chapter meeting January 15, 2024. Bob is going to provide Chuck a reduced size set of mentor tools that we could pass out to people. As part of the agenda we are going to talk about how we do teamwork and the coaching and the sharing load, if you will, when you get somebody that you don't know exactly how to mentor. We will also have a meet and greet and just get to know each other.
- We'll meet at the Wandering Griffin across from Wright State University that said they can handle us. It's by Home Depot. Chuck will take care of payment/invoicing if necessary.
- Nationally they were showing a 9% improvement in clients over this time last year. And they were showing in the 11% improvement for number of sessions nationally that we're looking at for that time period.
- The central region is showing a little over 12% for number of clients served and a little over 10% for the number of sessions improvements over last year.

- Bob is going to get Susie Heindl removed from the coaches list if she's no longer an active coach. Bob Pusker or figure out how we're going to get her involved.
- Chuck is going to take the responsibility to call each one of the people that have zeros on this section for coaching's completed. And if he doesn't get a satisfactory answer, he's going to suggest they decide to leave SCORE. Or maybe suggest they do events, workshops, or something similar.
- Right now SCORE National assigns coaches to potential mentors but as of now most of our new coaches come from people we already know so we will be the mentor by default until National tells us otherwise.
- Vel and Art and Cecelia will meet to discuss how to use of marketing budget with Facebook. Last year the budget was \$4,900 and it did not differentiate between marketing and advertising.

MEETING TRANSCRIPTION

Chuck: Yeah we said we'll get a hold of Allen and let him know that you suggested that. Whether or not they can get wrapped into what we're doing is unknown but that's a good idea.

Art: And that would be good Icebreaker to bring up the subject with him.

Chuck: In terms of the- the current proposal I guess Allen has been successful talking to some of the people over at the school. Apparently there was a message he sent me which was an initial acceptance of the idea from them. And I guess Steve has sent a message to check with the finance people to make sure we're not in any trouble if we agree to put money on this thing. You haven't heard back, have you Steve?

Art: You're muted Steve.

Chuck: You're muted Steve.

Steve: Yeah I was being respectful of the dog. [Laughter] I don't think we'd be in any trouble any place because Allen quoted the policy. The question is how do you do that because we don't have a checkbook anymore.

Chuck: That's right.

Steve: How do we deal with funds and if we just get ahead of it and also if we found a partner who is sponsoring a portion of that, how do you pull the funds and write checks out? Who writes them out? So I'm just jumping ahead to make sure the accounting is aware of what we're doing but Allen seemed to be on pretty clear ground.

Chuck: Okay.

Steve: We'll find out if he's not.

Bob: One of the questions I got was, could this be a nonprofit as well as a profit and there's a lot of non-profit activities that could blossom in this area.

02:00

Art: I think I don't know if Allen made it general but he thought that would be fine if somebody had a concept like that we just roll him into it.

Chuck: Yeah, I don't see why they couldn't compete. It's just a matter of showing you know what their objective is and what their needs are. If they got a good game plan that's the same thing you're going to ask whether it's for profit or not for profit.

Bob: I spent a lot of time in a Zen area working with One Beastro and a few of the other places. And it'd be nice to be able to find something the community could use.

Art: Yeah. Yeah I don't see any reason why that can't be.

Chuck: Yeah.

Art: I tend to call them Social Enterprises anyway. I don't like the term "nonprofit".

Bob: But you got to do that for tax purposes.

Art: Well yeah if that's the deal.

Vel: Well isn't a Social Enterprise a nonprofit as well as just actually giving resources back to the community in a different way and helping employ people and that type of thing?

Art: Yes.

Vel: So what's the big drive here? Maybe I'm missing something probably on this. It looks like you guys might have talked earlier about it or--

Chuck: No, we were just talking a little bit--

Vel: [inaudible] something.

Speaker: Well, we were waiting for everybody to check in.

Vel: Yeah, so what's the-- what's the drive on this because sometimes we'll like two or three people know all the details and then the rest of us I'm feeling like I don't know the details. Like what's happening there?

Chuck: Well that's why I sent everything out to everybody so you could read the details as best most--

Vel: But the details weren't that detailed.

Chuck: Well no that's all we know at the moment.

Vel: Well, I'm sure I'm not the only one that details were not that detailed but anyway. So what's the quick synopsis of what it is that you really want to do and why are we doing this?

Chuck: The major reason we need to talk about it is we need to officially decide whether we as a group want to fund this or not and if we do then we'll make a

change to our budget because this wasn't explicitly envisioned when we made the budget up.

04:20

Vel: Okay. Beavercreek has already been doing this for a while.

Art: No, this is the first one.

Vel: So this is the first one but they already know what the budget is and they want to get money to help something that they've never done before.

Art: I think Allen set the prizes.

Chuck: Yeah Allen figured that out.

Art: The schools. Yeah, I think- I think if we wanted to do something different with the prizes we could Vel and it's not just Beavercreek.

Vel: This is just for prizes.

Art: I think Cering is in. They're gonna try and get multiple schools but it will be held at Beavercreek.

Vel: Okay, and then it'll be a pitch contest for the young people.

Speaker: Yep, but there will also be some-- I think the way I understand it from Allen some training um to prepare them for the pitch. And then you know if one of them wanted to actually pursue it we would you know put them- put them in as a client and mentor them. So that- that's--

Bob: The kind of question I got though are we planning to be at the schools? Because if you're at the schools you're going to have to go through a- a police check that's before you go into the that kind of deal working with the students.

Art: Background check yeah and fingerprints.

Bob: Yeah.

Art: I think we need to have Allen check that.

Chuck: Yeah that's a good thought that's a good check for Allen.

Bob: Well we have that at church with the nursery school and the preschool type thing everyone who works there has to have a check.

Vel: Right.

Art: Well if this- if this is more of an event type thing Bob I don't know there may be a way around it but I think it's a--

Bob: As long as we don't go into the school we're okay.

Art: Yeah, well I think they're going to hold the event at the school. We could do other things--

Bob: That's no problem but if you're gonna go in and work with the students--

06:00

Art: Okay well we'll have Alan-- Allen would have to check that with school.

Chuck: Yeah, he'll have to check that.

Art: We don't know. That's a good- good point though. My wife used to be a tea--

Vel: Yeah it is a good point.

Chuck: The other thing we don't know is if there's additional costs that we might end up having to pay to put the party on you know.

Vel: Right. That's what I'm thinking like this seems to be the price-- the prizes but who's running the first part of this. There-- you can't just have training and have kids what are they doing after school? Then we have to provide food they need snacks or something.

Art: No.

Vel: Like who's the overall planner of this at the school?

Art: Business-- The business department teacher or teachers.

Chuck: Right.

Vel: Right. And then where is he or she getting funding from? And are they putting this funding in or are they looking for the partners to put funding in?

Chuck: That's an unknown but a good question for Allen.

Art: Yep.

Cecelia: Right. So I don't so to me it seems like we like jump to yes we're giving these prizes but why are we giving these prizes and how are we determining all of this. Like it seems like the other part of the foundation is not there yet.

Art: Well Allen's got a lot of it in his head and he's been talking about it but Allen being Allen...

Chuck: Well yeah, we'll have to encourage him to go beyond--

Art: Share.

Chuck: Yeah.

Vel: Yeah well I think it's great to be in your head and have this great vision. I'm just- we're just thinking like okay wait how is it going to play out later especially when you got- got a lot of teachers involved?

Art: He's going to have a lot of it figured out.

Vel: You got the superintendent involved.

Art: Yeah.

Vel: There's a lot of other people that need to know about this.

Art: Yeah.

Vel: If that is just in his head.

Art: I think-- well I- I think- I think he's talked to the teachers, and he's got some of it down.

Vel: Okay.

Art: He hasn't detailed it. And we are going to look for sponsors for the prizes. And I have one that's a 99% committed.

08:05

Vel: Right.

Art: And a second one that I could probably get so I- I'm guessing we could I could probably cover half of it just with a couple of my people I knew.

Chuck: That's good. That's good.

Art: They both would be willing to be judges and I know Allen's talked. Ah he's- he's got--

Chuck: Yeah he talked to a to a radio person about being a judge.

Art: Yeah- yeah and she's-- oh shoot I'm trying to figure what radio station she's with but she--

Beth: K99 Nancy Wilson.

Chuck: Yeah that's the one.

Vel: Yeah- yeah- yeah I think I did see Nancy Wilson on something. Yeah. But they're just going to be media sponsors and her name out there. She's not going to actually do it. Right?

Chuck: Well you know she may participate if she's going to be a judge.

Vel: She may participate, oh okay all right.

Chuck: And we could probably get some good publicity out of them to support it if she's going to be a judge, right?

Vel: Mhm.

Chuck: So I would suggest maybe Vel you and Allen need to have a good discussion about if they are going to try to wrap in the media people we're going to have to provide them with some sort of you know media input so that we get a good benefit for being out there and doing it.

Speaker: So this--

Chuck: You know we'll need to give them some kind of a package you know just like we did with-

Vel: Well yeah that's-- yeah we still need the other information so he's yeah.

Steve: Sorry inter--

Vel: When-- what's the date for this? When is the date that they're trying to do this again?

Chuck: He said April.

Steve: All right so there's-- there's a whole lot that we need to see from Allen about what's going on because he's talking about high schools plural would run local pitch competitions. So between now and before April all the high schools have to agree to hold these competitions, set the rules up and what's going on. And then the regional one would be the one we're talking about participating in. So we'll be

in that's the one Allen's put out and that's in his December 4th email. We would be-- we would just be the tail end of this thing. We would be the prize supporting the money and then putting together mentoring workshops for the finalists. There's-- there's got to be my thinking is a whole lot of stuff shown to us before we even get to the point we would participate. I mean right now he's talked to one school. Have they talked to other schools? So, we need- we need Allen on a meeting like this.

10:46

Art: Yeah I don't know why he's not here is he busy?

Vel: Yeah. So Steve you're saying that this the prize is to go to the the regional Champions.

Steve: Yeah.

Vel: So- so according to what he's saying there. He's--

Steve: There's four points let me just read them real quick. So the concept is number one high schools plural in the Miami Valley would run a local pitch competition and select the representative to participate in the regional pitch. Number two SCORE along with anybody else we recruit would provide mandatory training workshops for the student finalists and anyone else that would like to attend SCORE poli-- okay that's other stuff. Number three, recruit celebrity judges for the final pitch competition. And number four we'd fund it.

So that number one is the thing we'd have to see a whole big infrastructure underneath item number one, multiple schools, who they are, what if they've agreed upon all of them on ground rules you know the pitch has got to be kind of the same and then we become the regional thing. So, a lot of stuff has to be agreed to way before us.

Cecelia: So, we're right yeah unless we misunderstanding that he's thinking the one is down to the schools but anyway. The number one item you said about the high schools.

12:05

Steve: Yeah.

Vel: But it seems as though the high schools aren't ready to say like who's going to be in this contest in the Miami Velley.

Steve: Right. So, if I look at--

Vel: And then-- then what kind of training do they have? Is this just from the business school- the business department at the high schools or are they learning something else or...?

Art: We got we got we gotta get Allen and probably somebody from the school involved in this Vel none of us have these answers.

Steve: So let me make a proposal. Let me make a proposal.

Bob: When you read that one part, the four, three things or four things the paragraph above says, "Beaver Creek High School has reached out and requested to partner with SCORE to establish the annual high school". We didn't go to them, they came to us.

Steve: Right so you know if I take a look at where we are right now the reason I mentioned this to Chuck, we might today agree in principle to allocate funds right, providing that this whole thing comes together. The reason I mentioned that to Chuck was before we can commit any funds \$6,000 is above my approval level is probably above Chuck's also to do as an individual. So, if we as an executive committee agree to allocate the funds for this assuming it comes together at least we have a budget line item and we're clear with SCORE. Then we can make once we do that we can make our decision locally to go forward or not.

Vel: So that's you just saying put it into a budget that we are agreeing to that yes.

Art: Yeah.

Vel: We want to fund-- we want to fund this if it comes to play. We're- we're good at checking it out or whatever and then decide for sure. Then if we don't spend the money we just don't spend the money.

Chuck: Well we're supposed to have a budget that we all stick to for the year and if we're going to make a big change like this then we have to officially put our stamp of approval on it and change our budget.

14:03

Vel: Right. Got it. Okay. So that's the point that we're at right now. We're really not saying yes 100% we're doing this.

Art: Right.

Chuck: No we're- we're at least putting up that we'll-- if- if we can get all the stuff worked out we'll do it you know that's kind of what we're- we're agreeing to.

Vel: Got it.

Bob: Yeah we are trying to guess at what's going on and seems like Allen should be the one that's in the loop here when we're talking about it.

Chuck: He was in-- he was invited but he didn't show.

Robert: Yeah all these questions really need to be addressed to him and by him.

Chuck: All right guys. So let's get back to what we have to do as a business item. Is there any reason we shouldn't approve going ahead with this with Allen or or does it sound like it's something that we could end up doing?

Cecelia: I think it's something we can end up doing when we have more information about the logistics of how exactly it's going to work out. I don't think we're in a position to say it's a hard no but I also don't think we're in a hard yes position either but that's just my thoughts.

Speaker: I agree.

Vel: Yes I agree.

Chuck: We're agreeing to allocate this up. That doesn't- doesn't mean we're going to spend it.

Vel: Right.

Chuck: We're gonna allocate it. So we got room for it.

Vel: Yeah, allocate pending further discussions and...

Art: Yeah and I think as far as the amounts go if we want to skinny that down we can do that. Again this is something Allen threw out there to make it a little more exciting. And as I said I've got probably two small companies who could be sponsors if we can give them a package that gives them some good visibility. And they'd be willing to be judges as well. So...

Chuck: Yeah.

Vel: Well I don't think I would worry about the sponsorship if SCORE has the money to do it, why not make it all be a SCORE activity. If the SCORE's name under there and we still have celebrity judges but maybe that's additional something.

16:09

Chuck: I think Vel, it would make sense to get people involved in it you know the more involved they are the better it's going to work. And I- I think Art's right--

Vel: They'd still be involved. I'm just saying make it be a SCORE thing. We always want to throw out yes we're gonna do this, we're gonna- we're going to participate we're going to sponsor and then we go and look for somebody else to help do all the funding. No, we need to do the funding and be one of the be-- the presenting sponsor of it and then we can get other sponsorships under it.

Art: Okay well we can- we can be--

Vel: It can be a combination.

Art: Make us the Platinum sponsor then Vel. Make us the number one branded SCORE and number two and three can be the- the companies and that'll cut the amount in half.

Vel: Yeah. Oh yeah it's still fine to get them. Yeah just like- just don't plan on like oh yeah we got two or three other people out there. No, we just need to make a commitment. Yes, if it goes forth we're in charge of it. I mean that's what my thoughts are on that.

Chuck: That's going to be the way it works anyway Vel.

Vel: Okay.

Chuck: Whether or not people put up money or not we're still gonna run it.

Vel: Gonna do it okay.

Chuck: I- I think--

Bob: I've got a question. Are we really gonna run it because if you read the write up its the Beaver Creek High School that came up with all these ideas how they want to do it and everything else. They're really asking for us to sit there and put a few people up there to be the judges.

Chuck: Right, well that's fine with me. If that's what they want--

Art: They do some mentoring-- and do some mentoring.

Chuck: Well we gotta-- we gotta provide some classroom type stuff for them too apparently. So, we're going to have to teach them some things we're going to have to provide some mentors to work with them and we'll have to provide some judges and help fund the prizes. You know that that's basically our involvement if I read it right.

Bob: Well we really got to hear from Allen.

18:00

Chuck: Fundamentally what we need to do is and I've worked with Alan before on projects is Allen can be the actuator.

Art: But somebody's got to follow through.

Bob: Somebody's gonna follow through with Allen yes because all these details and all these questions--

Chuck: Allen

Bob: Allen doesn't worry about all the time.

Chuck: No, he doesn't worry about that, that's right. So all right well I need-- I think we need to go ahead and decide. Are we gonna go ahead and allocate this or not? I need to show a hands, who wants to allocate it?

Steve: I'm- I'm good with it.

Art: Yeah.

Vel: Yeah.

Beth: I- I have no problem with the- with the funding. It's the- the resource bandwidth that is my concern. I mean we- we have lots of great ideas but you know Allen's not on the call and when it comes down to it is someone else going to get stuck holding the bag of all the details. So that would be my concern.

Art: Well Allen-- I asked Allen and he said he would because he does travel and he said he would accommodate his schedule and be involved in this. But knowing Allen he's going to need a right hand for everything else.

Chuck: Yeah absolutely.

Art: And so that's where might again you know--

Vel: Need a right hand but--

Art: It might be an opportunity for a new member or a less active member to get engaged in the project and...

Chuck: Right.

Art: Take care of those details. I just think it-- yeah I think it could be fun it could give us some good publicity if we do that right. I don't know there I I see lots of pluses to it but again we need to be realistic and just know that Allen's gonna need somebody with a spreadsheet yeah.

Chuck: Exactly.

Vel: Yeah, but no I- I think it's a great idea too. I love the publicity and all that that too. But I think you also need to tell Allen like "Hey, you're gonna have to really step up and be a part of this not just assign it to somebody else".

Art: I already challenged Allen with that.

Vel: Okay.

Art: And he would make sure--

20:01

Vel: I think that's what you're saying as well.

Art: I'm just saying when Allen says he's in it, it means that he'll be there and doing a lot of personal interface which he's good at but not so good at--

Chuck: Don't ask him about details that's the problem.

Art: Specifics, yeah. Not his thing.

Vel: Yeah but that's what we're concerned about.

Art: Yes, that's the best concern. He has to be right.

Vel: He has to be ownership of some of these details too because like you say we end up, somebody else ends up taking it and then we're doing all the little details running around trying to get it all done in the meantime--

Chuck: Let me suggestion then. Vel and whoever else.

Vel: No, don't put me on there yet.

Chuck: Well you wouldn't stand up and ask all these questions. You need to get involved you know.

Art: No, no I- I disagree Chuck. I mean we're right now we're we're passing on the funding and we got to get Allen and we gotta get--

Chuck: I'm just saying-- all I'm trying to say is that somebody's got to get together and talk to Allen okay.

Art: Oh well I- yeah. And well why don't you and I take that on Chuck? Why don't- why don't you get to Allen and I'll be on the calls with you and we'll nail down a little bit. But I you know I- I think this is an opportunity for us to involve some other people other than the eight people that are sitting here that do.

Chuck: Yeah, I agree.

Vel: Right.

Chuck: That needs to happen. That's a good idea.

Art: If that doesn't happen then you know maybe we don't have the bandwidth and Beth's got--

Vel: Right and get the resources.

Chuck: All right I'll work with you. We'll talk to Allen.

Art: Yeah.

Chuck: But I'm- I may want to invite some more of you guys back when we finally get Allen cornered.

Art: Yeah. Yeah. That's fine.

Vel: Yeah that's fine.

Speaker: But we'll get see what details he does have and doesn't have and then we can go

Chuck: All right so Art and I will take the action and to get a hold of Allen.

Art: Yeah. I'm good with that. I've talked to him a bit about it.

Chuck: Yeah.

Bob: Another question, since we're through with this. It is going to be the 15th of January for the next meeting?

22:03

Chuck: That's the next chapter meeting.

Bob: Yeah, yeah the next chapter meeting, okay.

Chuck: Chapter meeting will be basically you know if I read the way Arts thing read this is sort of be a focus on the mentors. We want to make sure that we get information like Bob you owe me a- a reduced size set of mentor tools that we could pass out to people. You know you said you're going to work on that and I think that would be a good time to make- make sure it's out there, so we can give people something to work with. We ought to have a-- we ought to-- I'm going to put together a session and you with some statistics but I'll show you how we're doing and I plan to make that a segment of the January 15th meeting so that everybody knows how we're doing with respect to the program.

I think it would make some sense to talk about how do we do the teamwork and the coaching and the sharing load if you will when you get somebody that you don't know exactly how to mentor. And I think we need to make it absolutely obvious

that all of us are in this together and whether or not you know you got called first, you know if you can help somebody out with a client that is part of your responsibility because we're a coaching team. We're a team that's playing this and it- it can't be done as individuals as much as it used to be especially if we're getting people from outside the area we know absolutely nothing about.

Art: Yes.

Bob: Yeah there's a lot of situations where co-mentoring will come in handy because I got an individual who wants nonprofit, and I don't know anything about nonprofit you know.

Chuck: Well, yeah but you got several other people you know who do know.

Bob: I already got Bob-- I got Bob lined up to work with me.

Chuck: Yeah so you already did what you're supposed to do. You got a team member to work with them. Yeah and that's the thing that all of us need to take that responsibility we've got to make sure that we're there for our fellow mentors when they need us otherwise it's going to be hard to do this.

24:14

Speaker: Yeah when I get new clients I advise them that what they're getting is a team and we'll bring in subject matter experts where needed and possibly even a handoff if there's somebody else we find in the organization that can help them better than I can.

Chuck: So I agree with you guys that we should add a segment to that meeting then that brings everybody up to speed on what we're going to be doing with the schools and we'll use that as a let's make sure we can sign everybody who we're going to need up you know to work with Allen's project.

Art: Yes.

Chuck: So does that sound like a- a good menu of stuff to do for the 15th?

Robert: Yep.

Vel: Mhm. But no, what was the other part Art had on there? Because I thought there was some other component there?

Art: Well there's a meet and greet and just get to know each other a little bit like we did when we were over at the restaurant.

Chuck: Right.

Art: There's any new people in or even some of the people have been around for a while don't know some of the newer people that have come in and you've been here a year.

Chuck: Yeah. The only people they know is who they work with. They don't know the rest of us.

Speaker: Yeah. So just yeah-- just a little bonding.

Vel: We're still doing the meet and greet too?

Chuck: Oh yeah absolutely.

Vel: But what restaurant or what place?

Chuck: We've got a- a brew pub that's located across from Wright State University that said they can handle us. It's called the...

Art: Wandering Griffin.

Chuck: Wandering Griffin, yeah.

Art: It's by Home Depot.

Chuck: They said they have a- a room that they can set aside for us and you know we can order food off their menu and that sort of stuff as well as get drinks. So I think it- it'll be a good venue just like we had down at the- the other place for our meeting with the financial stuff. And that seemed to go off pretty well.

26:09

Steve: Did they bill us or do we have to pay off at that date?

Chuck: We don't owe them anything until we actually get there. They said there wasn't an advanced fee. I asked them if there was.

Steve: Once we're there do we have to pay that day or will they invoice us?

Chuck: Oh they'll invoice us I think.

Steve: [inaudible]

Chuck: And even if they won't I'll put it on a credit card and then we'll take care of it that way. I don't really care.

Steve: Okay.

Vel: So it'll be easier to hear in that place then?

Art: It's an upstairs room.

Vel: Okay.

Chuck: It's a separate room so we should be okay.

Vel: Yeah, the other ones were great when we had the first one Art that you did but it was a little hard to hear and a lot of activity.

Art: Nope this is separate room.

Vel: This is a small place, it still was hard to hear I thought. Okay.

Art: I've been there. I've been there.

Chuck: That's what I asked him for. I asked him for a separate room and then they were one of the few places that had one that was willing to let us have it.

Art: Okay there's another one when we're talking bars. Bricks downtown by the baseball stadium.

Chuck: Yeah, I've been there.

Art: They have an upstairs room too.

Chuck: Right.

Art: Yeah now that I think about it.

Chuck: Okay. So let's make sure we got this done. We've agreed we're going to go ahead and allocate the funds to do Allen's project. We're going to get together with Allen to make sure we get the details and start having something to really talk about at January.

Vel: Umm Hmmm.

Chuck: And that's Art and I are going to take the responsibility to go contact Allen and get that set up. And then we talked about the- the basic outline for what we're going to do on the 15th for the chapter meeting and just so you all know about that. I've got some stuff I want to just share screen with you to show you. If you'll hold on a second I'll pull it up.

Steve: Chuck as you're doing that I'll put a revised budget together for you. Should I just include the 6,000 or additional, any miscellaneous expenses?

28:05

Chuck: My suggestion is maybe put down like 8,000 just in case we get stuck for some other expenses that we don't know about.

Steve: Okay.

Chuck: All right. Okay. First thing I want to share is they had a conference Monday where they handed out some statistics about how we're doing on the program. Okay. And this was to date October, November and the first week of December and they pulled it off the system at that point in time. So, nationally they were showing a 9% improvement in clients over this time last year. And they were showing in the 11% improvement for number of sessions nationally that we're looking at for that time period.

For the central region in our pilot program, central region is showing a little over 12% for number of clients served and a little over 10% for the number of sessions improvements over last year. And in the central region they were also showing that they've had 15 people who graduated at this point in time from the first half of the program and are being sent out to become coached by the various chapters okay.

Now from what I know now this should probably be two because we've got two ladies now that have come down from the sessions. So, I got to update my chart but we've got two people. We got Marasha and we got- is it Alisha Blake? But they're two ladies that have finished their training. And Art's going to be doing Marsha and I'm going to be coaching the other lady.

30:06

Art: Alicia Blake.

Cecelia: Yeah what about Alicia Robertson, did she count in that number? She was my mentee before becoming a mentor?

Chuck: Did she go through the program though with in the pilot program or was that before that?

Cecelia: Oh, it was before that?

Chuck: Yeah this is only counting people who've gone through the first half in the pilot program.

Cecelia: Gotcha.

Chuck: So bottom line is if you look at these statistics we're ahead of the game. We're doing better than both Central and National. So, I don't think anybody's got any complaints for what we're doing and as far as I can tell I'd have to say the pilot program is actually working for us because it offloaded you know something we had to pay for and now we don't have to pay for it anymore. So I don't know how you all feel but I I look at this and I say, we're doing all right.

Vel: It looks that way.

Art: Yeah I think I looked at the Brit report and I guess our thing is going to be the new members.

Chuck: Yeah the Burt report I looked at that too and I've got another thing to share with you on that I'll bring it up when you can talk about it.

Art: In the workshops.

Chuck: Well yeah I didn't print that one out but I did print out the-- I gotta move this stuff over so I can--

Art: And we can all access these reports.

Chuck: Yeah.

Art: I'll engage if you want to.

Chuck: There it is. Basically what this just shows is it shows everybody in our group and it shows how many people we've had, how many of are long-term how-how many sessions we've had and how many mentoring hours that each one of us has done. And there's a whole lot of places over here where I see a bunch of zeros and either those people aren't getting assigned or they didn't fill out their profile or something.

32:12

Now in the case of Susie Heindl she shouldn't be there she's gone. I don't know why she still shows on there. But Bob Pusker can you make sure that if she's not

going to be there, we need to take her off and if she is figure out how we're going to get her involved.

Bob: All right I can do that.

Chuck: And there's a second page to this and again you can see there's some people on here that have zeros. I'm going to take the responsibility, I'm going to go back and I'm going to phone call each one of these people that have zeros on this section. And if I don't get a- a satisfactory answer then I'm going to suggest they decide to leave SCORE because we don't need a bunch of dead weight on- on here that aren't doing anything. So, I'm going to take that responsibility on. I'll make a first contact with them. If they agree to get something done I may come back to you guys and ask for some help to hold their hand to get through it. But for now I'll take the responsibility of calling them and finding out what's going on.

Steve: Yeah before you chase him around away for just mentoring, if somebody's not comfortable with that Chuck would be good to then to ask what else they would be happy to do like events or workshops or something.

Chuck: Right. You know the issue is we're going to have to make note of that somehow because the system is going to make them look like they're zero.

Steve: Yeah I know.

Vel: And what does that Follow On percent mean? What does, how do they measure or is that the---

Chuck: Follow On percentage is how many of your people that you actually talk to the first time did you get a second session with.

Vel: Oh okay. So the second session is what they're counting for that.

34:00

Chuck: Yeah.

Vel: Okay.

Chuck: Basically you know they've always measured one-and-dones and that's kind of what that gets at.

Vel: Right.

Chuck: So that, let's just give you a viewpoint of what's going on out there. Again, I don't really see there's a cause for much worry in those things.

Robert: Let me ask or add a comment to that Chuck.

Chuck: Okay.

Robert: That this new pilot system has a couple other wrinkles in it. These two new provisional volunteers that were signed to us that you mentioned just a few minutes ago. I actually have one lined up for a mentoring session later this afternoon at 3:30.

Chuck: Great.

Robert: But Nancy our volunteer and intake coordinator after they complete their online training she sends a message to me and Chuck, and I don't know who else gets saying--

Chuck: I think it's basically you and me Bob. I don't think I see anybody else on the list.

Robert: Well there's a third one on there but in the two cases you mentioned the third person was from some other chapter.

Chuck: Oh okay.

Robert: I didn't recognize the names. So they're including other chapters and they're asking these three people, me, Chuck and this third person, to get them co-mentored.

Chuck: Right.

Robert: The co-mentoring process for the three sessions.

Chuck: Now in our case Bob--

Robert: She says only after the three sessions- three co-mentoring sessions does she assign a coach. She says she's assigning a coach which doesn't make a whole lot of sense to me.

Chuck: But I thought when- from what I heard when I went to the main sessions to do this they said that we were going to actually assign who the coach is or we can tell her who the coach is going to be one of the two. If she wants.

36:00

Robert: That's not what her email said.

Chuck: Well that's the way I'm going to play it until they slap my hand to tell me it's wrong.

Art: Well just make sure you tell her and then if it's not a go then she'll tell you back.

Chuck: Exactly.

Art: I don't know why she would care if we specifically have people.

Chuck: I don't think she would either.

Art: Like one lady I recruited and I already have a relationship.

Chuck: Right. So basically what I my game plan was when we decide who the coach is going to be that I'm going to message her back and say, "Here's, here's the coaches you know. Assign these people because they're- they're going to do it". And so--

Art: I don't know why she wouldn't. No matter what the system says.

Chuck: Yeah, I mean she can care less who it is.

Art: Right.

Chuck: As long as somebody agreed to be the coach right?

Art: Right.

Chuck: So that's the way I'm going to play it.

Art: All right.

Chuck: If they don't like it they'll tell me.

Art: Yeah and then we'll gain the system.

Chuck: That's right. We'll figure a way around it as usual.

Art: Yeah.

Chuck: All right.

Vel: Make sure I get second sessions from now on.

[Laughter]

Chuck: Yeah. You're on our list Vel, we'll get you eventually.

Vel: Yeah I know. See if I can get a second session. I get 100%.

Chuck: There you go, yeah.

Vel: Percents drive me nuts. I have to get percent.

Chuck: [Laughs] All right anybody--

Vel: Have to find out the game. So I have a question though. I have this person that's-- she wants to start a nonprofit which-- she's actually not kind of ready but anyway not for me to determine that part. But she has these Articles of Incorporation that I actually think she kind of copied from something else because one thing she has a big glaring mistake in there. Like we have the number of-- director of board of directors could be from five to 10 and in parentheses whereas the 10 she has the number three you know so like okay you done copy from something else. But anyway, who do we tell people to go to- to get their Articles of Incorporation reviewed and that kind of stuff, setting up with the actual setting up a nonprofit? I know she goes to the Secretary of State but then what- who else do we need to tell her?

38:21

Chuck: Bob and Earth that's your nickel. What's the answer?

Robert: That's the-- that's actually the part I've been doing with these new nonprofit startups. Vel I--

Chuck: Oh you've been doing that you have time to talk to somebody else or...?

Robert: Didn't I just send you all the attachments that I send out to the new nonprofit startup people?

Chuck: Yeah I have that.

Robert: Articles of Incorporation in there.

Chuck: Yeah but it's probably-- oh that's probably where she used that.

Robert: Anyway we- what we-- let's talk about that separately.

Art: Okay if you're wanting a legal review pro bono is what I send people to if they've got their articles done down there too.

Vel: Okay pro bono.

Robert: Down there too yes.

Vel: Okay.

Chuck: Yeah, pro bono helps too yeah.

Vel: Yeah. I thought it was pro bono but I said, "Well let me make sure that's the place we suggest that they can go to then if not then they can- they have to pay for somebody".

Bob: Yeah.

[crosstalk]

Bob: The problem is pro bono doesn't really respond very well to the newbies. They're slow.

Vel: Okay. Yeah, so otherwise--

Bob: So how they assign people but...

Robert: Well they're process is cumbersome.

Bob: Yeah for a newbie.

Ve;: Oh the pro bono for a newbie.

Art: Yeah.

Bob: Yeah.

Chuck: Vel thank you for making the system work. You did good by asking the question. That's what we're supposed to be doing.

Vel: So, all right great all right so pro bono and then so Bob they don't need to come back to you because I've already sent her the packet for starting.

Robert: No, unless she has any specific questions I can try to answer them.

Vel: No, she's like "Well will you review my Articles of Corporation? Are they ready to go to the Secretary of State?" Like okay that's not my...

40:02

Art: Yeah, we can't dispense legal advice.

Chuck: That's right.

Vel: Right.

Chuck: They got to talk to a lawyer for that.

Vel: Yeah.

Robert: That's not that's not really legal advice. That's just proof reading and making sure it made sense.

Vel: Okay, yeah well proofreading I found the first mistake already.

Art: Oh that's a good point. Yeah.

Vel: Yeah, so like okay you need to review it again and have your board of directors actually look at it because somebody else should have caught it.

Art: And just like let her know that you're not providing legal advice. So from the standpoint of the correctness of it you're just doing an edit to make sure it makes sense.

Vel: Right.

Chuck: All right guys.

Vel: Yeah because she has a format she's using so...

Art: Okay.

Vel: Okay yeah I'll just tell her a mistake on there. Okay.

Chuck: Unless anybody's got something else to bring up I think we've done it for the meeting today.

Cecelia: I do, I've got something.

Speaker: Hold on.

Cecelia: I'll be quick.

Chuck: Okay. Go ahead.

Cecelia: All right so know you've talked to me and Art you reached out to me as well on the social media piece. So, I've reached out to National. I finally got some contacts. I've been to a couple of National meetings. So I'm going to share my screen on what I have found out. And let me know when you can see my screen.

Art: Yep.

Chuck: I can see it.

Art: Yep.

Cecelia: All right so there is a company called Hyper that SCORE uses for social media and they've got different packages is for what it is that they do. So they've got a quarterly. I'm not sure if anybody's familiar with this or if anybody's seen this, so if you have and I'm just repeating what you already know I'll apologize but for those who haven't this is what they offer. They've got a quarterly content boost where they boost eight post on our page a month for a budget of \$100 a month. So each post will get equal billing and it'll get boosted on our page. This can go out to Dayton and the surrounding areas. There's their setup fee and then the monthly management fee. This is something they offer as a quarterly thing.

42:02

So, for me personally since this is my wheelhouse, I don't like boosted posts. Boosted posts are good for eyeballs but they're not good for an engagement. So, there's a better way to do this. So that was the one option that they have.

The next thing is kind of like on the fly boosted post same thing. There's a better way to do it. But what this does is like if have an event coming up then we can put it out there like if it's something open for mentors and mentees or someone who's interested in SCORE, we can then create an event and boost that out to Dayton and other surrounding areas to let people know, "Hey we're going to be here at this day and this time. Food and drinks will be served", or whatever it is we want to do. But this is something else they do and this is just on an as needed basis.

And then the next thing that they have are workshops and webinars. So I don't know if our chapter per se has done any workshops or webinars but this is chapter specific and this is an app which is basically having an event and inviting people to come to the event.

The next thing is LinkedIn and from what I gather on the calls that I've been on LinkedIn is best for recruiting mentors Facebook is best for recruiting mentees. So LinkedIn is in my wheelhouse anyway but this is another package that they offer. And then the driving local web traffic this is definitely in my wheelhouse. This is where you're getting more eyeballs to your Facebook page more likes more follows and that sort of thing.

So I was going through here looking at what it is they offer. They've got the FAQ. So in my opinion, I think we would want to do this campaign so that way we build our likes and followers to our page. The LinkedIn piece again not so much unless you guys want to recruit more mentors in the area that's totally fine. But then the other one that I think would benefit us is the boosted content but of course doing it in a better way so that we're getting not just eyeballs but engagement as well. So for the two packages that they have or the packages that they offer the ones that I think would be most beneficial would be the quarterly and then also the web traffic-bringing people to our Facebook page.

44:26

So I just wanted to bring that up as those are the ones that I see that will benefit our local chapter the most.

Now because this is my wheelhouse and after going to a few of these calls and listening to the person who is facilitating or who is the hyper representative, she doesn't appear to be very knowledgeable about the different aspects of Facebook and Facebook ad campaigns. I think she's got a great overview but she doesn't understand the intricacies of what Facebook advertising campaigns are capable of doing. So I did want to throw that out there. So, if that is something that we are interested in doing I would be more than happy to take the lead and do that for the same pricing that we would pay if Hyper was to do it for us.

Chuck: I have a question.

Bob: Did you check with the people who do our web page down in Texas? They do it for all the SCORE chapters Nationwide. They may offer a service similar to this.

Cecelia: Oh I don't know who that is. So if you want to send me their information, I will be happy to reach out.

Chuck: Yeah.

Bob: I'm not too sure what their name is but the lady from Cincinnati who does our web page she can give you the information what's her name?

Art: Lori.

Vel: Well Lori that's the name of--

Chuck: Lori Allison.

Vel: I can't remember that was the first name we gave you Cecelia that we thought they were supposed to be doing the social media and that Hyper was doing it. Well we were part of a campaign National had and they were paying the prices for us to- to do it.

46:10

Chuck: Right.

Vel: So maybe they're not paying.

Chuck: That expired at the end of the fiscal year.

Vel: Okay. Oh it just expired at end of the fiscal- okay. I thought they were doing it earlier.

Art: They're still posting but they're not boosting or ads

Vel: Okay. With what Cecelia is saying the boosting isn't what we really needed anyway.

Cecelia: So when you boost the post--

Vel: To get the engagement right?

Cecelia: Right. You get eyeballs, you just don't get engagement right.

Vel: Right. So, we want engagement.

Chuck: The question I have for you Cecelia is, do they allow us to send them local based material? Because you know they almost all these things are like peanut buttered for across the country you know. Like do they allow us to post anything that happens locally or not?

Art: Yeah we-- Cecelia and I are admins. I think Vel is too. We can post to Facebook.

Cecelia: And also SCORE, National when I was on the last social media meeting with them SCORE and National posted for us as well. So, they post up both National and chapter specific for us every month.

Vel: Oh.

Chuck: Well I also got a thing in the email this morning which they've sent out a National-based success story page. So that anybody who's got a success story can post it and National will pick it up. I'm gonna send that out to all of you guys so that you'll have the- the same hot button that I found. And you know what I think might make sense is to make sure that if we're going to put stuff in our newsletter we probably ought to have- have the same kind of stuff being fed into National as well. I don't know what you guys think but it seems the right thing to do to get our success stories out there.

48:10

Vel: But I think we, well I don't know what Hyper and I forget the name of other company that you talked about Bob.

Bob: [inaudible]

Vel: And maybe you're trying to find it out too Cecelia what they actually were doing or maybe they're not do anything else other than if we pay for it now I guess. Is that what you're saying too?

Cecelia: Well that was my understanding and talking with Hyper, if we want to use their services then we need to pay to use their services yes.

Vel: Okay.

Cecelia: So whatever corporate contract or National or whatever was going on is no longer exists.

Vel: No longer exists, right.

Chuck: So, Cecelia from your standpoint what is it you're recommending that we think about doing?

Cecelia: So, what I am recommending that you think about doing is that we have posts that we highlight every month and we boost. We don't boost them but we

promote them for engagement. So, one of the things that I specialize in with my clients is that you can set up a chat bot. So, for instance if we have a post that's out there for engagement, if someone comments on that post then we can have a conversation with them through their Facebook Messenger leading them to become a mentor or a mentee depending on what post they're commenting on. And then we can have those conversations and make people more aware of that we're out here. So, that's the one thing. And, the eight post I think was part of the Hyper program eight posts per month. But we wouldn't do it as a booster post. It would be an engagement post so people will be-- because Facebook has buckets. I don't want to get into the nitty-gritty of it. But when you boost the post, Facebook's going to show it to people who might take a second and look at it. When you engage-- when you do an engagement post, Facebook's going to show it to people who are most likely to give it a thumbs up, a comment or something. Those are the people who are in my opinion more engaged and will be open to possibly learning more about what SCORE can offer them. And then the second thing that I suggest as a-- is a likes campaign where we are bringing people to our page because I just think there's just not a lot of awareness about SCORE in the community. So by doing a likes campaign, we can get more followers and on our page more likes on our page so that way more people are seeing the stuff that we're posting.

50:36

Chuck: So how much would that cost us to do both of those things?

Cecelia: All right so the first program is \$450 a quarter with a \$100-- I'm sorry a \$50 campaign fee and a \$100 marketing budget. So, \$450 whatever that is divided by three plus 150 a month but you pay the quarterly fee up front.

The second campaign is 350 setup per campaign. So, if you do more than one then you pay 350 for how many campaigns you do and you have a monthly management of \$100 and a budget anywhere from \$6 to \$10 a day.

Chuck: So, I didn't get enough of that to be able to add it up but I guess what I-- what I would suggest is we take a look at it and based on what you and Art and Vel think, let's put together what kind of budget we should set aside for it. I don't know or I don't remember the number we set aside Steve but I know we had an advertising budget, I just don't remember what it was.

Steve: Let me see if I can pull up. We had a marketing budget for the year of \$4,900.

52:07

Chuck: Yeah, I think that probably accommodate what you're talking about. The question. is that the right use for that money and I think I'd like to rely on Vel and Art and Cecelia to kind of put your heads together and tell us what we should be doing. But got-- that budget is out there so we should use it appropriately.

Steve: Yeah that \$4,900 also includes marketing we would do for special events. So, if we have a like the--

Chuck: Right.

Steve: The thing we had at the Brew House there, Brewing Company, anything we did for marketing and publicity comes out of that budget.

Vel: Yeah, well if we did some of the social media then that would actually be helping to promote that as well. So...

Art: Yeah that could be part of it.

Vel: Yeah.

Chuck: Right. Well--

Vel: So, it's not being exclusive by in-- yeah exclusive by saying "Oh we want to do social media and it has nothing to do with anything else".

Art: So like this campaign approach would work with an event and we could--

Vel: Right.

Art: My thought is to give one or the other probably a shot and then Cecelia measure of the results and see what we get because we've not had a lot of luck with Facebook and we don't to my view see very many followers. So...

Vel: Right.

Art: You know so if this works, we should really move the dial I would think.

Vel: Right.

Art: I think we should give it a shot.

Vel: Yeah because we did the stuff with Hyper before and it really didn't have a big impact.

Art: Right. So that's- that's my question.

Vel: Yeah, we would send them information as well and also that company down in Texas we would send information and National-- and they still-- they would post things I would see them come up but you know people weren't--

Art: Yeah but I think Cecelia if she's on top of it she can probably get to it to more compelling posts.

Vel: Right.

Art: Just to guess since this is a guest.

Chuck: The- the other problem I see with the National stuff is you know that it goes out nationally and we're only really looking for volunteers from our local area.

Vel: Right.

Chuck: So seems-- it seems like we're paying for you know putting it out there and it's going to the advertising to the wrong segment if you get what I mean.

54:24

Art: You can geographically bound it can't you Cecelia?

Cecelia: Well yeah that's the whole point of doing Facebook ads is you can set your boundaries you know, Dayton and you can go out as far as 50 miles from Dayton.

Art: Yeah, it wouldn't be National Chuck.

Chuck: Okay.

Art: [inaudible]

Vel: Yeah they still would be local like we were doing.

Speaker: Yep.

Chuck: That- that makes a lot more sense.

Vel: Yeah--

Art: [inaudible]

Vel: Oh yeah even before-- even before they were trying to do it locally but or regionally but we still didn't get.

Cecelia: Yeah, I'll put something together and then I'll set something up with Art and Vel and then we'll hammer it out and then we'll have something to present at our meeting on January 15th.

Speaker: Beth, you are a marketing person, you have anything to say about this?

Beth: Well, the only thought I had was you know as a former business owner I was on LinkedIn all the time.

Speaker: Yeah.

Beth: And I would have used SCORE if I had known that SCORE existed. So, I think perhaps we could- we could get clients not just mentors you know from LinkedIn if we had more of a presence.

Speaker: Yeah.

Chuck: Do these kind of posts allow you to have a response other than just telling whether you liked it or not?

Cecelia: So that's the whole point of setting up a chat bot you know AI is amazing. It just celebrated its one-year birthday on November 30th. And what AI allows you to do is to have conversation through Facebook Messenger before you decide if you want to take your online offline. So, we have a post and someone comments, then they would immediately get a response back to their post thanking them for the comment and then they'll say, "Hey check your messenger". And then in messenger then we would send them a message like "Hey, thanks for commenting on my post. Do you want to know more about SCORE?" Or we could ask them "Are you a business owner?" Or you know I mean it can go, yeah.

56:21

Chuck: Yeah.

Cecelia: But so yeah, it definitely has some screening. Again LinkedIn is not my main hub, so I don't know as much about LinkedIn as I do about Facebook and Instagram. But from the meetings that I've went to what the general consensus seems to be is LinkedIn is really good for finding mentors and Facebook is good for finding mentees.

Chuck: Okay.

Cecelia: But I also agree with what you said Beth you know business owners are on LinkedIn and because they may not be familiar with SCORE, they don't know how to reach out to us. But again I can't stress enough LinkedIn is not my jam.

Chuck: Okay.

Cecelia: But I'll get something together and I'll meet with Art and Vel before we get together on the 15th and then when we meet again, we'll have a direction on how to move forward.

Chuck: Okay. Sounds like a a good way to go. And like we said you there's a budget out there we need to use it effectively, so you know that's up to you guys.

Cecelia: All right that's all I have.

Vel: Let me ask, hey Steve is there anything in the budget that just says advertising or was it all just under marketing?

Steve: It's all under marketing.

Vel: Oh okay.

Chuck: Okay. I think then just to summarize we've all agreed we're going to go ahead and allocate stuff for Allen's project. We've basically agreed on what we want to do for the January 15th meeting. I'm going to be coming back to you guys and ask for some help to get it all set up. But I think we've agreed basically on what we'd like to do and in terms of these questions we've got to ask Art and I have an action item to get to Allen and- and make it happen. So we'll do that.

58:16

Art: Allen says that's fine but right now he's in Aruba.

Bob: Yeah--

Chuck: I knew he was traveling. I just I didn't know if he'd take the time to try to sign in and be with us or not.

Art: He said that- that- that the Wi-Fi on the beach conveniently sucks.

Chuck: Oh well

Art: Go figure.

Chuck: I've experienced that too. Yeah.

Art: Yeah right.

Steve: Chuck, he's got a meeting fairly soon with Beaver creek actually next week so I asked him to give you a call before the meeting.

Chuck: Okay.

Steve: So you can brief him on really what we need.

Chuck: Good. Let's do that. Cecelia can you stay on for a couple of minutes after everybody goes away?

Cecelia: Sure.

Chuck: Okay. Great. If anybody else has anything now is the time otherwise we'll call it a wrap.

Beth: Chuck what time is the meeting on the 15th? So I can put it on my calendar.

Chuck: I told them noon to two.

Beth: Okay.

Chuck: When I signed up for the room. So let's- let's stick with that.

Beth: Thank you.

Steve: Take care bye.

Art: Okay thanks guys.

Vel: Right, bye.

Beth: Bye.

Chuck: Bye guys.