ONBOARDING GUIDE

Get Inclusive

WELCOME…

… and thank you for choosing Get Inclusive as your training provider. We are honored to be a part of your team and we're dedicated to helping you make your training program a success. This guide will walk you through the onboarding process and review the information we will need to get you launched. It also contains a short FAQ.

If you have any questions along the way, please contact us. We are available at support@getinclusive.com. We recognize that onboarding is a very important part of your journey with us, and we want to personally make sure it is as smooth as possible. We work as a team and are looking forward to being of service.

FIVE SIMPLE STEPS TO LAUNCH YOUR TRAINING

1. Complete the **Online configuration form** and send it back to us; a link will be provided
2. Review and approve module **customizations** to make sure all information is correct
3. Gather and send us your **participant list** of students and/or employees
4. Have your IT department **allowlist** our domain so our emails aren't stuck in spam
5. On Launch Day, you'll send an **introductory email** to your participants and we will follow with **individually tracked invitations** emailed to each of your participants. After your launch, we will set up an email **reminder campaign** to encourage participation.

DETAILS

STEP 1 Gather and Send Module Customization Information

The Get Inclusive online training module is highly customized, so we need key pieces of information to get it ready for you. Examples of key information include the **contact person** for your campus policies and details for **jurisdiction-specific definitions**. You may need to reach out to others on campus to obtain all the information.

What you need to do: Please enter the key pieces of information requested in the attached **customization form** and send it back to us **right away.** Most of the requested jurisdiction-specific definitions will be found in your campus policy prohibiting sexual misconduct, assault and violence. If you have any questions about items on the form, please reach out to us. We're here to help!

STEP 2 Review and Approve Module Customizations

As soon as we have the completed customization form back from you, we are able to begin the customization process. The information you provide on the form will be integrated into the Get Inclusive online training module (or modules) you selected. It takes us about one week to integrate the content. After that, you will need to review and approve the customizations.

What you need to do:

- Look out for the email we'll send to let you know the customizations are ready for your review. The email will include an attachment that contains screenshots of each customization as it appears within the module(s).
- Please review the customizations in the email attachment and provide us with your feedback right away. Several updates may be necessary to incorporate all of your comments for approval.
- When you have approved all the customizations, we can then generate and send you a **review link**. The review link lets you go through the customized module to see exactly what your participants will see and you can provide us with any final feedback.

STEP 3 Gather and Send Your Participant List

You can get started on this step right away. To launch your training with individually tracked invitations, we will need a simple Excel spreadsheet (see attached template) containing the following information for each participant:

Column 1: **ID** (Unique permanent id, e.g. employee ID, or student ID)
Column 2: **Email Address** (official or campus email address)
Column 3: **First Name**
Column 4: **Last Name**
Column 5: **Reference Data** (optional)

The Reference Data column is for your use. Information in this column will be included when we generate progress reports for you. You can use it to group your participants into cohorts (by semester, class, department, status, etc.). Multiple identifiers and/or cohorts can be entered; simply join the information using colon separators (:) instead of spaces. We do not need any of this information, so this column can be left empty if you don't need it.

A	B	C	D	
id	email	first_name	last_name	reference_data [Optional (Student,
333	alex@college.edu	Alex	Nguyen	id:123456; Freshman
444	farooq@district.edu	Farooq	Saleh	
888	mrodriguez@university.edu	Maria	Rodriguez	term:Spring2018; id:667788
777	jonesr@campus.edu	Reese	Jones	Dept:History; Type:Adjunct

What you need to do: Prepare the participant spreadsheet and send it to us. If you subscribed to more than one module, please prepare a separate spreadsheet for each module. To reduce the likelihood of a participant having multiple accounts in our system, please use official (abc@company.com) or campus (xyz@campus.edu) email addresses on the spreadsheet(s). Please send your participant list to us as soon as you have it ready.

If you would rather send a link yourself or post a link to the training on an internal system, we can provide you with a self-enrollment link. Please keep in mind we are not able to accurately track participant progress this way because we do not know who has received or has access to the link.

STEP 4 Have You IT Team Allow Our IP/Domain

To be sure our communications are delivered to your participants, please have your IT department (or the person who handles email and firewalls at your organization) allow our IP Address and Domain. This is an important step in the onboarding process because our communications will include reminders for participants to complete the training, in addition to the initial invitation. We want to be sure your organization's email firewalls don't intercept our large quantity of email as spam.

What you need to do: At least two weeks prior to launch, contact your IT department and let them know they need to **allow** our IP address and/or email domain. Please refer to Appendix 03 "Email Firewall Allow-listing Request" for a template you can use to communicate this to your IT department.

STEP 5 Launch Day! You'll Send an Introductory Email and We'll Send Invitations

This is the day you'll send an **introductory email** to your participants and we will follow with **individually tracked invitations** emailed to each of your participants. We typically send our invitations the day after you've sent your introductory email. That gives your participants time to read your email before they receive ours, which reduces confusion and increases participation.

The introductory email introduces your participants to what **bystander intervention** is and why it is important for them to take the training. This is also an opportunity for you to introduce Get Inclusive as your training provider and provide logistical details such as the due date and who to contact for questions.

The **subject line** of our invitation emails will match your introductory email's subject line so they are included as part of same conversation in participant inboxes. Be sure to communicate the subject line of your email to us prior to your launch day.

What you need to do - PRIOR TO LAUNCH DAY:

1. Review and **approve** the module
2. Send your **participant list** to us

3. Create an **introductory email** to send to your participants (see Appendix 01 “Sample Introductory Email to Students” and Appendix 02 “Sample Introductory Email to Employees”)
4. Let us know what **subject line** you will be using on your introductory email (we will use the same subject line on our invitations)

What you need to do - ON LAUNCH DAY:
Forward a copy of the introductory email to us. We need the time/date stamp to get the timing right on sending our invitations. We also use it as a reference in our invitations and to answer questions from your participants through support@getinclusive.com.

POST LAUNCH

Email Reminder Campaign to Encourage Participation

We will set up an email reminder campaign for you after your launch. Reminder emails will be scheduled and delivered only to participants who have not completed the module. The subject line, content, and schedule of the reminders can be adjusted to align with your due date and drive action. Here are a few examples:

a. “**Bystander Module Due Soon**” - sent the week prior to the due date
b. **“Due Today - Bystander Module**” - sent on the due date
c. “**Past Due - Title IX Module**” - sent every two weeks after the due date

Deactivations

After a certain period of time, you may want us to deactivate your participants who have not been responsive. This can be done on a regular basis. Continuing to report a participant’s progress as incomplete when that participant is no longer expected to complete the module could cause a summary report to be inaccurate. **Deactivation does NOT delete the record.** It simply prevents the record from being included in summary reports.

We have several keys to deactivate participants and would like to go over these during our onboarding discussion with you:

1. **Deactivating after sending X number of reminder emails** - if a participant has been sent 15 reminders and still has not completed the module, then it is unlikely that person will complete the module
2. **Deactivating after X months since the invitation was sent** - if a participant was invited 8 months ago and still has not

completed the module, then it is unlikely that person will complete the module

If you subscribed to the employee module, then it may be best to send us updated lists of current employees. That way we can deactivate any employees who are not in the most recent list and add any new ones right away.

FREQUENTLY ASKED QUESTIONS

1. **How long does it take to launch?**
   It is a straightforward process for us to enter the information to customize the modules for you. However, the review and approval of these customizations will take time as you and your team coordinate to review the updates and then provide feedback to us. We may go back and forth a few times as necessary to incorporate all your comments. In most cases, we are able to launch in 2-3 weeks.

2. **How do we check participants' progress?**
   You will have access to the dashboard to view your participants' progress in real-time. We will also email progress reports to you periodically.

3. **Do the participants receive reminders?**
   Get Inclusive will take care of sending reminders to participants who have not completed the module. We will also keep track of how many reminders have been sent, who opened the reminder emails and how much progress was made. You can always request a list of participants who have not completed the module and we will provide you a detailed Excel spreadsheet with email addresses.

   Reminders can be scheduled at the start of academic term and you can determine the exact dates and email subject lines for these reminder emails.

4. **How do we update the modules when contact information changes?**
   We can update the modules for you as frequently as you would like. Just email us the information and we will take care of the adjustments.

5. **What is the typical completion rate?**

   Once a participant clicks on the “Start” button in our invitation email, there is 80-90% chance that they will complete the online module. The hardest thing is to get the participants to open the invitation email in the first place.

   There are several factors that influence the open rates: 1) Subject and 2) Message inside the email. To maximize open rate, we vary the email subject text. We start out with what you have in the intro email.

   For the weeks approaching the due date, we change the subject to “Due Soon”, “Due Today” etc. to communicate urgency. After the due date we change the invitation email subject to “Past Due” which gives another boost to participation. We’ve found a due date to be a very effective action-forcing event.

6. **What is the typical participation rate?**

   Every college is different. Some of our customers have 90%+ completion, others are as low as 30%. Community colleges with online/remote learning programs typically have lower participation rates than colleges with residential programs.

7. **How do we add/remove participants from the module, e.g. new or graduating students, new employees or retiring employees?**

   Just email the updates to us as frequently as you like and we will adjust the participant list on our side to reflect your changes. If you prefer an automated process and have IT resources on your campus who can develop it, there is an automated process that can generate a participant list and put it on our secure FTP servers. This reduces the amount of manual work needed to stay up-to-date with compliance requirements.

   If secure FTP-based ongoing participant list sharing is a viable option for you, please refer to this the “ SFTP Integration Specification”.

APPENDIX 01

Sample Introductory Email to Students

Please feel free to customize the following sample introductory email to send to your student participants:

---------------------------------- SAMPLE EMAIL START -------------------------------------

From: leader@campus.edu
To: All Students
Subject: Required Training on Bystander Intervention

Dear Students,

[[**INSTITUTION NAME**]] holds standing up and looking out for one another's safety as a core value. One way in which our school commits to this value is by providing students with bystander intervention training. We want each student to have the knowledge and skills be an **activate bystander**, who **intervenes** when anyone is observed being harassed or endangered by sexual violence.

Being an active bystander doesn't stop at the edge of campus. For that reason, **all students** are required to complete the training. This includes students who are enrolled part-time, living off-campus, or those in online programs.

How to Complete the Training:
You will receive an email from our training partner, Get Inclusive, in the next few days. Simply follow the link in that email to begin the training. The training module is self-paced and will take around 20-30 minutes to complete. The training must be completed by [[**DUE DATE**].

For technical support, please contact support@getinclusive.com.

This training is mandatory for all students. To discuss the requirement or whether it applies to you, please contact:
[[**LEADER NAME**]]
[[**LEADER POSITION**]] at [[**INSTITUTION NAME**]]
[[**LEADER CONTACT INFORMATION**]]

Thank you in advance for your cooperation and participation in this important training.

Sincerely,
[[**LEADER NAME**]]

-- SAMPLE EMAIL END ---

APPENDIX 02a

Sample Introductory Email to Employees
Title IX Module

Please feel free to customize the following sample introductory email to send to your employee participants:

--------------------------------------- SAMPLE EMAIL START ---

From: leader@campus.edu
To: All Employees
Subject: Required Training on Title IX

Dear Employee,

As an employee of [[**INSTITUTION NAME**]], you are required to report any student or employee disclosures of sexual harassment to your Title IX coordinator, [[**TITLE IX COORDINATOR**]]. To ensure all employees are aware of and understand that process, we are providing training on Title IX and how to report disclosures. This training is **mandatory** for all employees, including part-time employees and adjuncts.

How to Complete the Training: You will receive an email from our training partner, Get Inclusive, in the next few days. Simply follow the link in that email to begin the training. The training module is self-paced and will take around 20-30 minutes to complete. The training must be completed by [[**DUE DATE**]]. For technical support, please contact support@getinclusive.com.

To discuss the requirement or whether it applies to you, please contact:

[[**TITLE IX COORDINATOR**]], Title IX Coordinator
[[**TITLE IX COORDINATOR CONTACT INFORMATION**]]

Learning Objectives:

- Understand the impact of Title IX and the Educational Amendments of 1972 on colleges and universities, their employees, and their students.
- Become familiar with the responsibilities of campus employees as mandated reporters under Title IX.
- Develop a shared language around terms related to various types of sexual harassment
- Become familiar with our institution's statement prohibiting sexual harassment

Thank you in advance for your cooperation and participation.

Sincerely,
[[**LEADER NAME**]]

-- SAMPLE EMAIL END ---

APPENDIX 02b

Sample Introductory Email to Employees
Inclusion Module

Please feel free to customize the following sample introductory email to send to your employee participants:

-- SAMPLE EMAIL START ---

From: leader@campus.edu
To: All Employees
Subject: Required Inclusive Leadership Training

Dear Colleague,

Inclusion is a very important value we share at [[**INSTITUTION NAME**]]. To strengthen our commitment to inclusion and to practice the art of Inclusive Leadership, we need to take time to reflect on what makes us unique and how we relate to differences, perspectives and contributions of others in our community.

We have partnered with GetInclusive for access to an **online module** focused on **Inclusive Leadership**. The module can be accessed and completed at anytime during the next 30 days. You can complete the module over several sessions if you prefer. In total, it should take you approximately **90 minutes** to complete the module.

We encourage you to take the **insights** you gain from this module and integrate them into your **coursework and classroom discussions** or to **engage in conversations with your colleagues**.

This training is **required** for all employees, including part-time employees and adjuncts.

How to Complete the Training: You will receive an email from **Get Inclusive** in the next few days. Simply follow the link in that email to begin the training. The training module is self-paced and will take around 90 minutes to complete. The training must be **completed within 30 days** of receipt of the email from Get Inclusive. For technical support, please contact support@getinclusive.com.

To discuss the requirement or whether it applies to you, please contact:

[[**INCLUSION TRAINING LEAD / COORDINATOR**]]
[[**CONTACT INFORMATION**]]

Learning Objectives:

1. Examine your own identity and the identities of other people in terms of race, ethnicity, gender, sexuality, language, religion, country of origin and other chosen markers.

2. Begin to learn the appropriate language for talking about these differences in a respectful and inclusive manner.
3. Gain a deeper understanding of your own identity and how you currently perceive people who are different from you.
4. Gain an understanding of the harmful effects of labeling and stereotyping.
5. Understand that while generalizations can be useful in some instances, making generalizations about entire groups of people is unfair.
6. Become aware of biases that you may not have realized you had, and consider strategies to become more aware of how these biases impact your day-to-day interactions.
7. Consider how different aspects of a person's identity can provide varying degrees of advantage depending on the circumstances of a given location, interaction or situation.
8. Be able to define privilege and examine the role privilege has played in your own life.
9. Explore the multi-faceted definition of oppression.
10. Develop a deeper understanding of what it means to communicate and how you can become a more effective communicator.
11. Increase your awareness about how culture can influence communication styles and develop strategies to identify and respond to styles that are different from your own.
12. Learn techniques to effectively resolve conflict that arises from cultural differences and misunderstandings.

Thank you in advance for your cooperation and participation.

Sincerely,
[[**LEADER NAME**]]

--------------------------------------- SAMPLE EMAIL END --

APPENDIX 03

Email Firewall Authorized Sender listing Request

Please feel free to copy and paste the following sample email to send to the head of your IT department (or to the person who manages your email security). Be sure to cc ali@getinclusive.com so we can answer any technical questions your IT team may have and provide them with updates to IP addresses that occur from time to time.

--------------------------------------- SAMPLE EMAIL START ---

To: Director of Campus IT (or department managing email/security)
cc: tech@getinclusive.com

Subject: Request to Allow IP Addresses for Email Delivery

Message: We are working with Get Inclusive (an online training vendor) to provide training for our students (and employees). They will be sending a large number of individual module-related emails to all of our participants and we want to make sure these emails do not get stuck in the email firewall/spam filter or get throttled.

If you have an email firewall/spam filter, e.g. Barracuda, or something similar, could you please make sure to add the following IP addresses to Authorized Senders and if possible, the domains as well:

IP Addresses (all provided below):

```
198.2.180.57
149.72.219.196
23.251.229.37
54.234.211.167
213.232.86.55
```

Domains:

```
getinclusive.com
*.getinclusive.com
```

If you have any questions, you can contact the vendor directly at tech@getinclusive.com

Thank you,

[[YOUR NAME or SIGNATURE]]

-- SAMPLE EMAIL END ---

