GetThere Schoolpool Training

5/7/21

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Matt McKimmy

Director of Support
RideAmigos

Today's Topics

- Basic Schoolpool Concepts
- Parent Experience
- Setting Up & Managing Schools
- Communications & Reporting

What are Schoolpools?

Schoolpools give users tools to easily find and message other nearby households for the purpose of establishing groups to form carpools or other shared commutes.

Opt-In Models

There are two ways of populating household data for matching users with one another:

- Gathering opt-in consent during school registration and uploading a household roster
- Sharing a school-specific join link and encouraging users to sign up via the web

Opt-In Models

Roster Advantages - Initial schoolpool welcome email can contain match results. PDFs can be generated to mail to families without email.

Roster Disadvantages - Important that when gathering consent to participate users fully understand that their data will be shared via a web-based matching system.

Opt-In Models

Web Sign-up Advantages - Users more naturally understand they are sharing their data via the web.

Web Sign-up Disadvantages - Users will need to revisit site or be sent a follow-up email after other families register to see their full list of match results.

Parent Experience - Roster Upload

First touch-point is opt-in during registration for school year.

Second touch-point is email from schoolpool system with downloadable PDF of potential matches w/ contact info and invite to claim their household online and explore more results.

Parent Experience - Web Sign-up

First touch-point is invitation with school join link to create an account and enter their household's information.

Second touch-point is follow-up reminding them to log in (or download PDF) to see their match results.

Finding Matches

Once a user has registered or claimed their household a new “School” menu item appears.

Users can manage their household or click on the school’s name to see their matches.

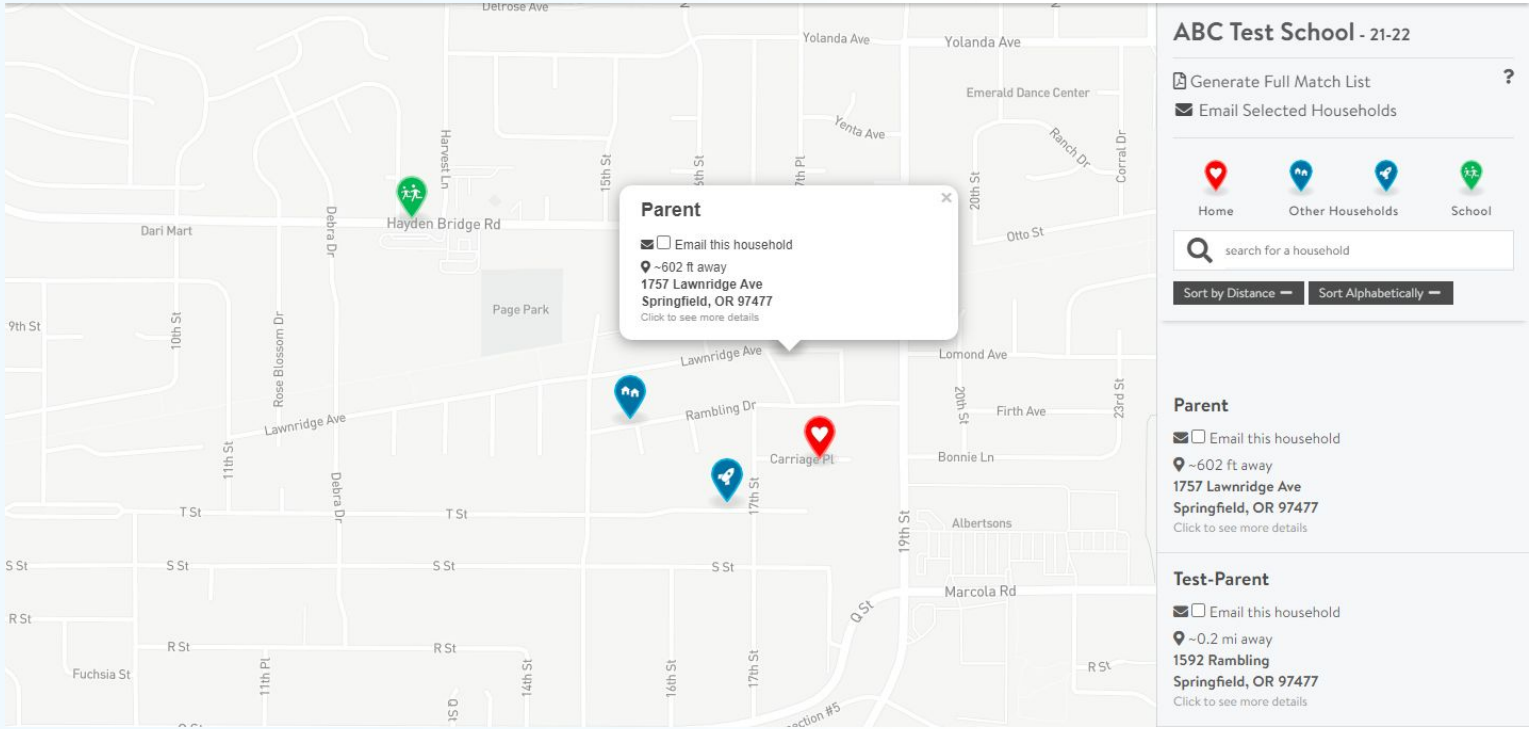
Finding Matches

The match view shows the user's home location, the school's location, and nearby matches the user may want to contact.

Details about matches include distance, address, guardian info, and student info.

Users can also generate a PDF match list from this view.

Finding Matches



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Contacting Matches

Users can select households they want to contact about forming a schoolpool, then click Email Selected Households.

The user is given a list of email addresses they can copy into their favorite mail app, along with a recommended message to share their interest in schoolpooling.

Managing Your Household

User accounts on Get There can claim or create multiple households.

For example, if a family has children in two separate schools and households were imported for each.

Households can also be associated with multiple Get There accounts if multiple parents want to claim.

Cross-School Visibility

After creating or claiming a household, users can choose to enable **cross-school visibility.**

Selecting this option lets other nearby users associated with different schools see you as a potential match when viewing their results on the web.

(Cross-school results do not appear in PDFs.)

Removing User Data

Users who wish to no longer be visible as a match can opt-out using email links, delete their household data from their manage household page, delete their Get There account, or contact a schoolpool administrator or school manager to have their data deleted.

How are Schools Created?

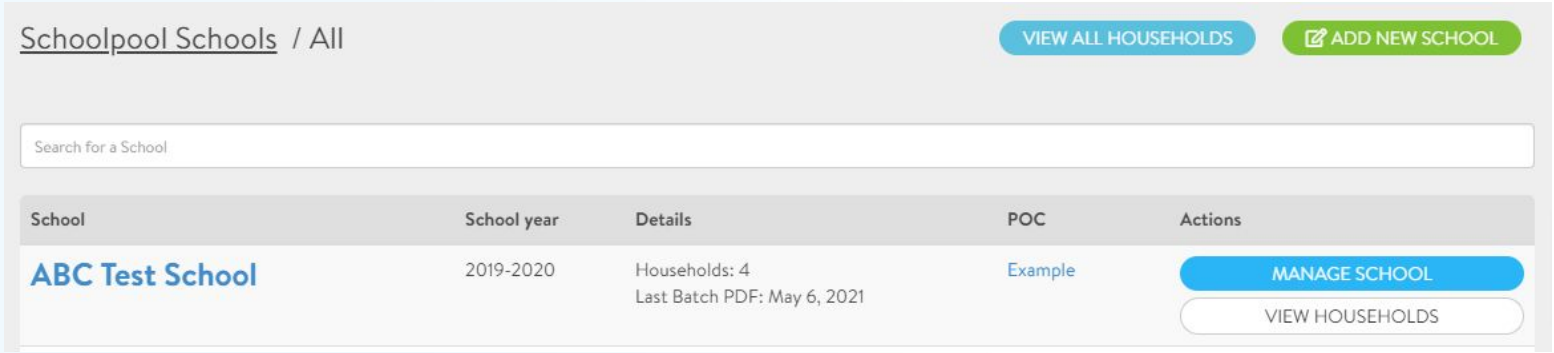
Schoolpool schools are created by regional program managers. Once created, schools can be assigned additional managers, such as someone from the school.

Each school is created or reset for each school year.

How are Schools Created?

To create a new school, head to **Manage > Schoolpool**

Then click “Add New School”



Schools - Required Data Fields

- Name of School
- Email Address
- Current School Year
- Street Address

Schools - Optional Data Fields

- Description
  - Visible only to managers
- Point of Contact
  - Visible to managers for quick emailing
  - Used for optional “find a school” feature
- Logo

Managing Schools

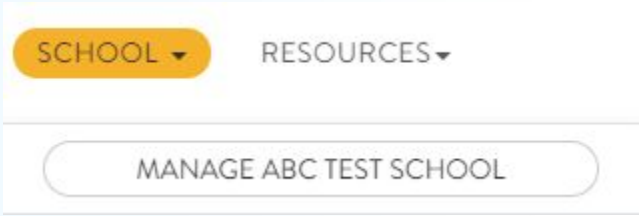
Schools have two levels of permissions:

Managers - Edit schools; import, view, and edit households; generate and download match PDFs, send emails to households

Administrators - Above plus create schools, add managers and see Get There user accounts associated with households

Managing Schools

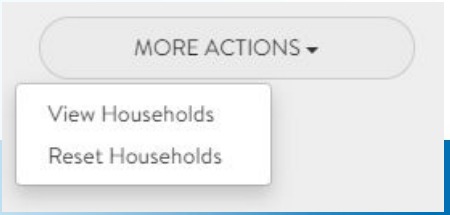
Once added as a school manager, users can access their schoolpool tools from **School > Manage (School Name)**



Managing School Years

Each year you will need to reset your school's schoolpool data, either by creating new schools or removing all households and updating the school year field.

Removing all households can be performed via the More Actions button and allows you to use the same school join link for multiple years.



Populating Households - Web Sign-up

Each school's join link is available from its manage page.

Share the join link via your school's official and secure communication channels.

Households will be asked to register for a Get There account then enter their schoolpool-specific information.

Populating Households - Roster Import

On a school's manage page: More Actions > View Households

On the top right: Import Households

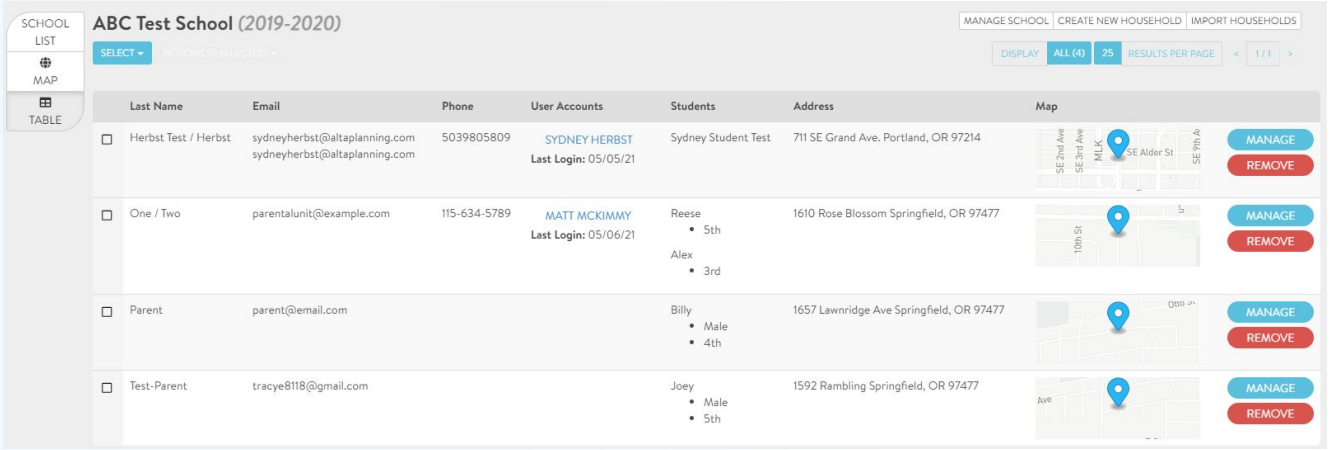
You can download a sample CSV to ensure your data is formatted correctly for import.

After uploading your data will be validated for errors.

Viewing Households

On a school's manage page: More Actions > View Households

Household data can be viewed in table or map format.



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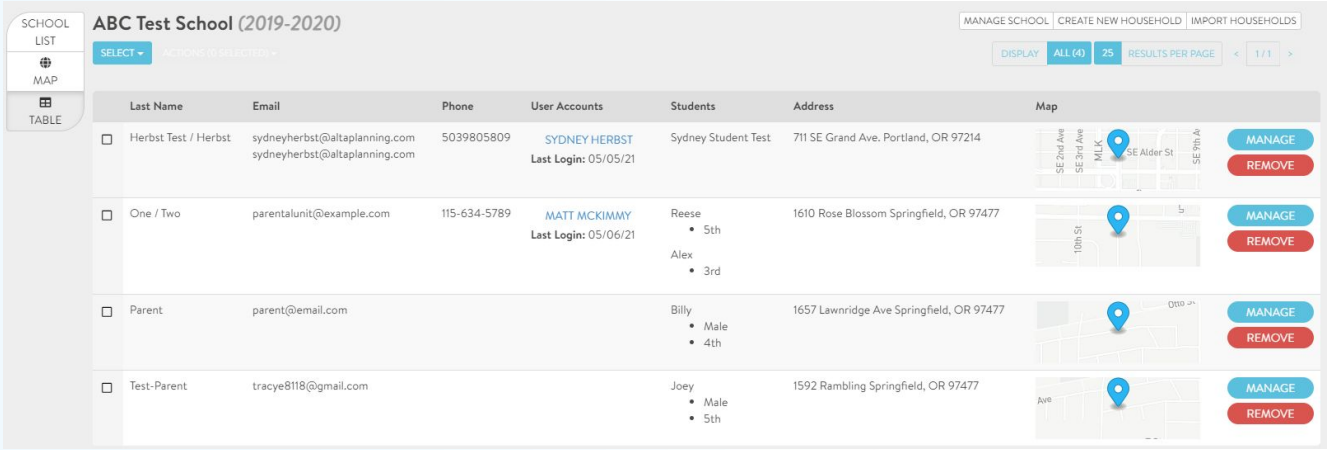
Viewing Households

From here you can manage, remove, and create new households for your school.



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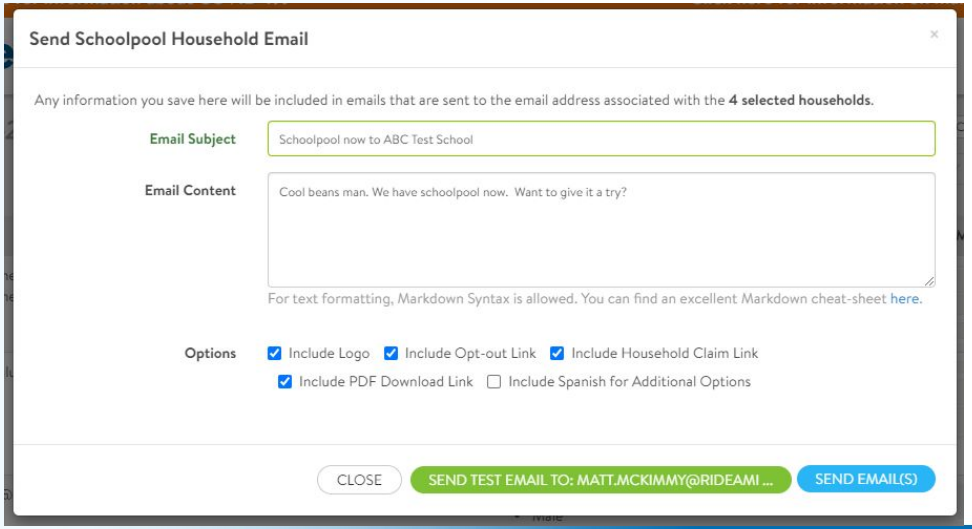
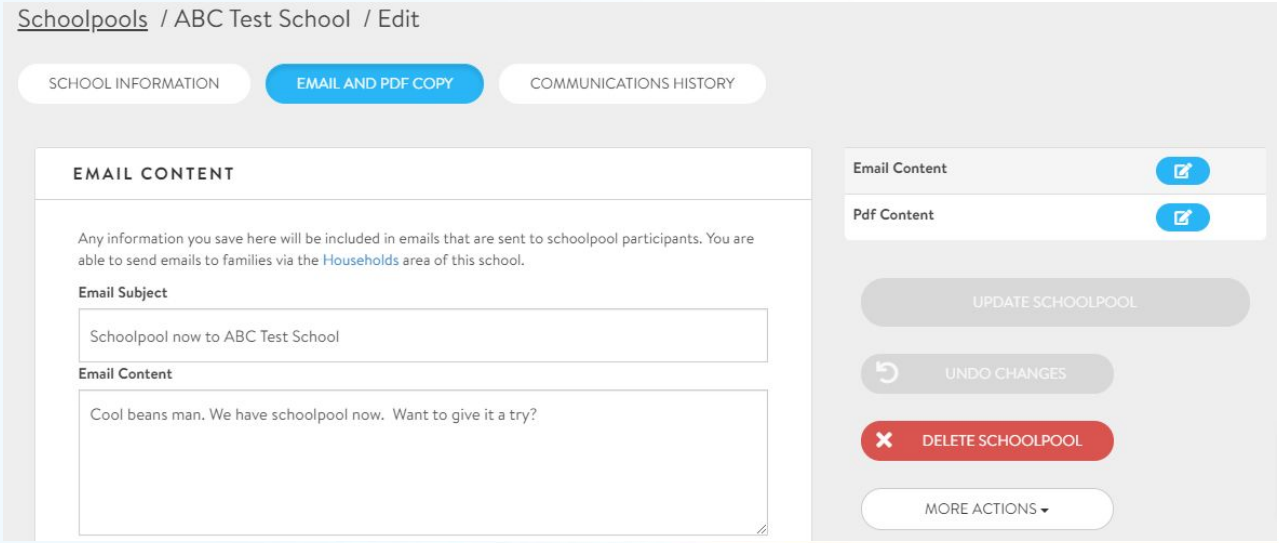
Viewing Households

You can also select users in map or table view for sending email communications or generating PDFs.



Communications

Default email content is set in the school's Email and PDF tab



Email Communications

Emails and match PDFs are typically sent after populating households and prior to the start of school.

When using web sign-up we recommend initially sharing your school's join link, allowing time for users to register, then reminding users to check their match results by sending an email with a link back to the site.

Email Communications

When using roster upload be sure to include an opt-out link to allow users to easily remove their uploaded data.

Including household claim info allows imported households to claim and update their data.

PDF download links allow users to see matches without having to register for Get There.

PDF Communications

PDF generation allows managers to create a single PDF with up to 100 households' match results, useful for paper mailing.

If you anticipate a lot of users without email, use roster upload, collect phone numbers, and mail PDF match results.

Q&A