

GetThere Schoolpool Training

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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.

One/Two Household

MANAGE HOUSEHOLD

ABC TEST SCHOOL





Finding Matches

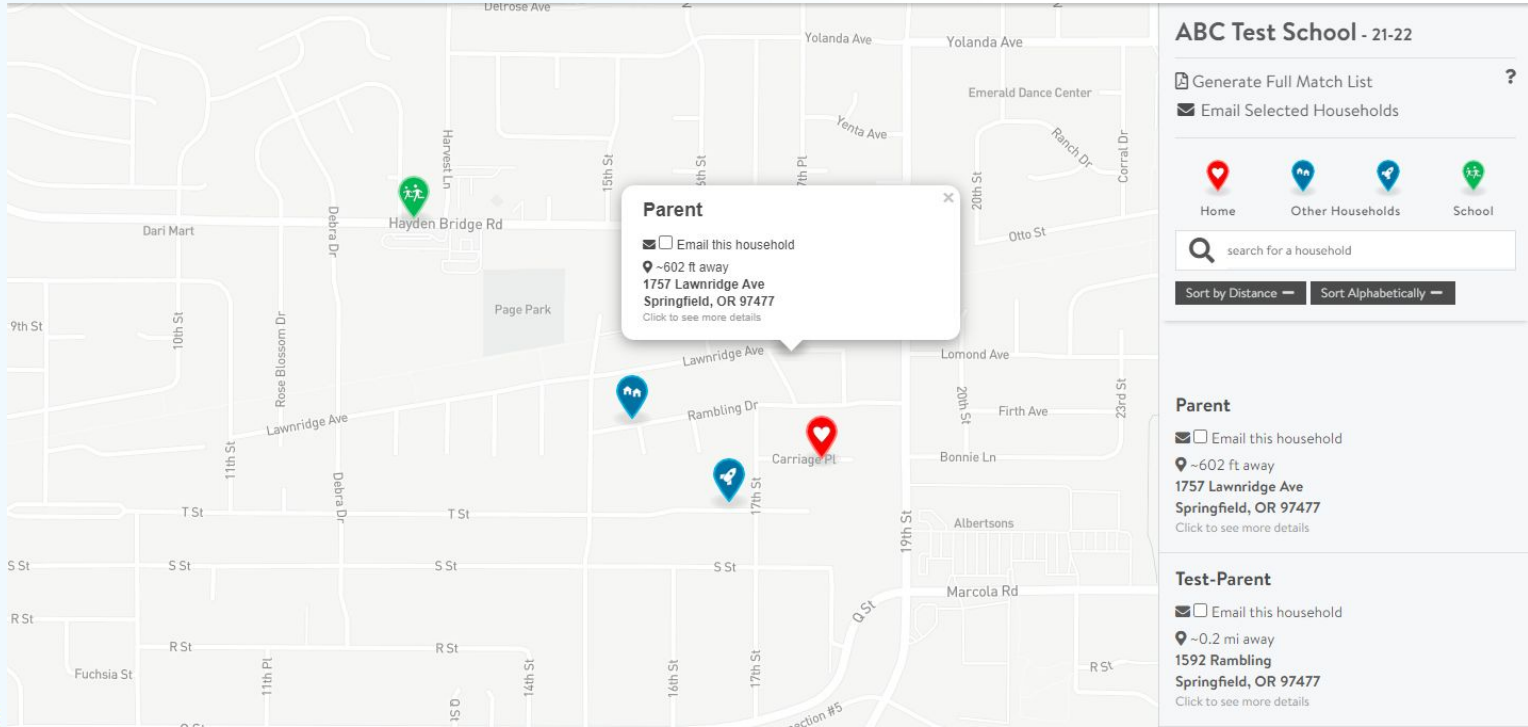
The match view shows the user's home location, the school's location, and nearby matches the user may want to contact.

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

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



Finding Matches



The map displays a neighborhood in Springfield, OR, with streets such as Dari Mart, Debra Dr, Rose Blossom Dr, Lawnridge Ave, Rambling Dr, Carriage Pl, and Marcola Rd. A popup window titled "Parent" is centered over a red location pin at 1757 Lawnridge Ave. The popup includes an unchecked checkbox for "Email this household", a location pin icon, the address "1757 Lawnridge Ave Springfield, OR 97477", and a link to "Click to see more details".

ABC Test School - 21-22

Generate Full Match List ?

Email Selected Households

Home Other Households School

search for a household

Sort by Distance — Sort Alphabetically —

Parent

Email this household

~602 ft away

1757 Lawnridge Ave
Springfield, OR 97477

Click to see more details

Test-Parent

Email this household

~0.2 mi away

1592 Rambling
Springfield, OR 97477

Click to see more details





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”

Schoolpool Schools / All VIEW ALL HOUSEHOLDS ADD NEW SCHOOL

Search for a School

School	School year	Details	POC	Actions
ABC Test School	2019-2020	Households: 4 Last Batch PDF: May 6, 2021	Example	MANAGE SCHOOL VIEW HOUSEHOLDS





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

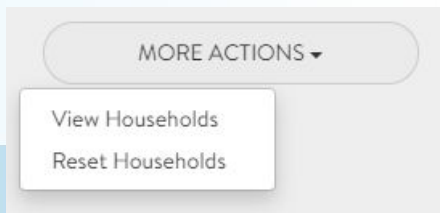
Once added as a school manager, users can access their schoolpool tools from **School > Manage (School Name)**



Managing School Years

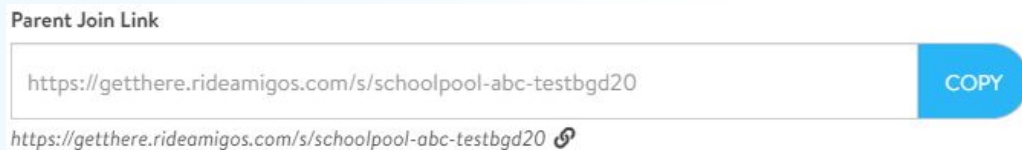
Each year you will need to reset your school's schoolpool data, either by creating new schools or removing all households and updating the school year field.

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.

SCHOOL LIST
MAP
TABLE

ABC Test School (2019-2020)

MANAGE SCHOOL | CREATE NEW HOUSEHOLD | IMPORT HOUSEHOLDS

SELECT - ACTIONS (0 SELECTED) +

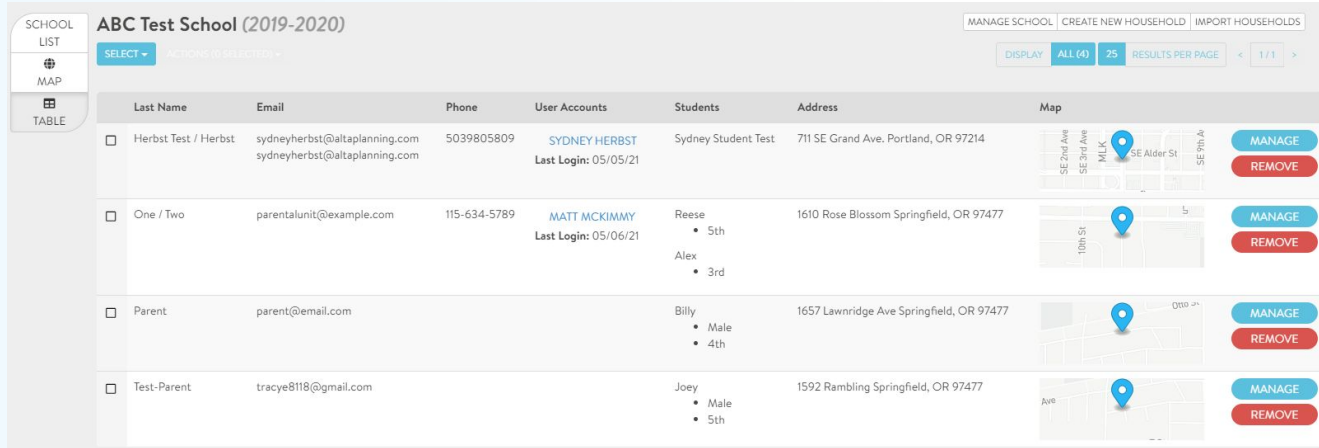
DISPLAY ALL (4) 25 RESULTS PER PAGE < 1 / 1 >

	Last Name	Email	Phone	User Accounts	Students	Address	Map	
<input type="checkbox"/>	Herbst Test / Herbst	sydneyherbst@altaplanning.com sydneyherbst@altaplanning.com	5039805809	SYDNEY HERBST Last Login: 05/05/21	Sydney Student Test	711 SE Grand Ave, Portland, OR 97214		MANAGE REMOVE
<input type="checkbox"/>	One / Two	parentalunit@example.com	115-634-5789	MATT MCKIMMY Last Login: 05/06/21	Reese • 5th Alex • 3rd	1610 Rose Blossom Springfield, OR 97477		MANAGE REMOVE
<input type="checkbox"/>	Parent	parent@email.com			Billy • Male • 4th	1657 Lawnridge Ave Springfield, OR 97477		MANAGE REMOVE
<input type="checkbox"/>	Test-Parent	tracye8118@gmail.com			Joey • Male • 5th	1592 Rambling Springfield, OR 97477		MANAGE REMOVE



Viewing Households

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







SCHOOL LIST
SELECT ▾ ACTIONS (0 SELECTED) ▾

MAP

TABLE

MANAGE SCHOOL CREATE NEW HOUSEHOLD IMPORT HOUSEHOLDS

DISPLAY ALL (4) 25 RESULTS PER PAGE < 1 / 1 >

	Last Name	Email	Phone	User Accounts	Students	Address	Map	
<input type="checkbox"/>	Herbst Test / Herbst	sydneyherbst@altaplanning.com sydneyherbst@altaplanning.com	5039805809	SYDNEY HERBST Last Login: 05/05/21	Sydney Student Test	711 SE Grand Ave, Portland, OR 97214		MANAGE REMOVE
<input type="checkbox"/>	One / Two	parentalunit@example.com	115-634-5789	MATT MCKIMMY Last Login: 05/06/21	Reese • 5th Alex • 3rd	1610 Rose Blossom Springfield, OR 97477		MANAGE REMOVE
<input type="checkbox"/>	Parent	parent@email.com			Billy • Male • 4th	1657 Lawnridge Ave Springfield, OR 97477		MANAGE REMOVE
<input type="checkbox"/>	Test-Parent	tracye8118@gmail.com			Joey • Male • 5th	1592 Rambling Springfield, OR 97477		MANAGE REMOVE



Viewing Households

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

Send Schoolpool Household Email

Any information you save here will be included in emails that are sent to the email address associated with the **4 selected households**.

Email Subject

Email Content

For text formatting, Markdown Syntax is allowed. You can find an excellent Markdown cheat-sheet [here](#).

Options

- Include Logo
- Include Opt-out Link
- Include Household Claim Link
- Include PDF Download Link
- Include Spanish for Additional Options



Communications

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

[Schoolpools](#) / ABC Test School / Edit


SCHOOL INFORMATION **EMAIL AND PDF COPY** COMMUNICATIONS HISTORY


EMAIL CONTENT

Any information you save here will be included in emails that are sent to schoolpool participants. You are able to send emails to families via the [Households](#) area of this school.


Email Subject


Email Content

Email Content 

Pdf Content 

UPDATE SCHOOLPOOL

 UNDO CHANGES

 DELETE SCHOOLPOOL

MORE ACTIONS ▾





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

