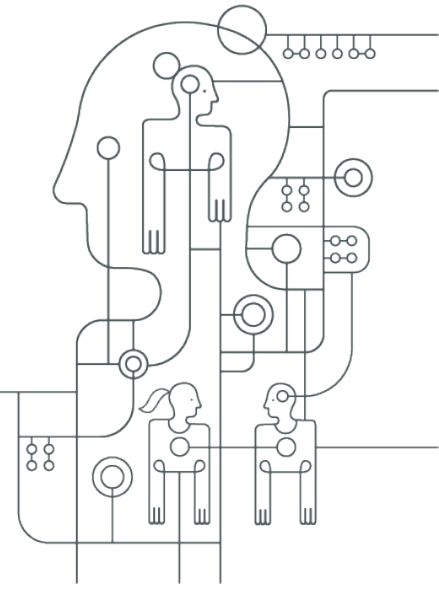


# Welcome to EVERFI





# EVERFI Welcome Packet

This resource was designed to provide an overview of your partnership with EVERFI. We truly believe in being partners in your prevention education and compliance journey. To ensure a successful partnership we've created a structured process for implementation. Both EVERFI and your institution will be required to complete tasks through an agreed upon timeline in order to launch your courses and achieve your larger outcomes and goals.

This packet will provide you with a high-level overview of the following:

- Partnership Expectations and Timeline
- Orientation Process
- Building Your Team
- Next Steps

## How to Use this Welcome Packet

1. Review this resource prior to scheduling your Kick Off Call
2. Follow the suggestions below when selecting your EVERFI Launch team then complete the [Launch Team form](#)
3. Share the EVERFI announcement with your Launch, team to prepare them for the Kick Off Call

**Note:** Be sure to download this PDF document to take full advantage of the navigation features.

## What to expect from our partnership

You have decided to invest in a comprehensive prevention and compliance solution. At EVERFI, we believe the content and technology we provide can only be as good as the people behind it, which is why we have over 100 full-time employees working on the Higher Education team. The Higher Education team is made up of attorneys, prevention leaders, engineers, designers, and federal lawmakers, all here to help our partners succeed in their prevention and compliance efforts.

Furthermore, the Customer Success Team will work side by side with you and your team to ensure you are maximizing the benefit of the EVERFI platform. They will continue that partnership throughout the year for additional support around training, best practices, course deployment, and data deep dives.

One of the many resources available to you and your team is the Campus Prevention Network. The Campus Prevention Network is committed to creating safe and healthy college communities by sharing best practices for addressing sexual assault, substance abuse, and more. [Activate your membership](#) in EVERFI's Campus Prevention Network by signing the pledge to assess your prevention efforts and strive towards best practice! This will also give you access to a vast library of resources to help you in this effort.

To ensure your institution gets the most out of our partnership, it will be important for your Customer Success Manager to understand both your immediate and long term goals when it comes to your institution's prevention and compliance initiatives. This will be important to maintain throughout the partnership, even as goals may shift over time, as it will allow your CSM to provide the most accurate guidance for your team. With strong goals and consistent engagement from your institution's team, we will be sure to have a successful partnership!





## Orientation Process Overview

Orientation at EVERFI is the allotted time prior to your first launch where your team is trained on all things EVERFI. You will be assigned an Implementation Specialist who will take you step-by-step through the decision-making process over an estimated 4-6 week period, which includes a few scheduled meetings, emailed training guides, and educational videos. We provide the training and your team will be required to deliver on any follow up items.

The diagram below outlines the timing, key milestones, and participants required for each stage of the process. **Click each meeting name below to view a description of the session and details around the time commitment needed to accomplish each milestone.** Please note that the orientation period is flexible and depends highly on your team's ability to complete the deliverables.

Sample Timeline	Name of Milestone	Key Participants
Week One	<ul style="list-style-type: none"> <li>• <a href="#">Kick Off Call</a></li> </ul>	<ul style="list-style-type: none"> <li>• Executive Lead</li> <li>• Project Lead</li> <li>• Implementer(s)</li> </ul>
Week Two	<ul style="list-style-type: none"> <li>• <a href="#">Implementation Planning</a></li> </ul>	<ul style="list-style-type: none"> <li>• Project Lead</li> <li>• Implementer(s)</li> </ul>
Week Three	<ul style="list-style-type: none"> <li>• <a href="#">Administrator Training</a></li> <li>• <a href="#">IT Connect</a></li> </ul>	<ul style="list-style-type: none"> <li>• Project Lead</li> <li>• Implementer(s)</li> <li>• IT Contact</li> </ul>
Week Four	<ul style="list-style-type: none"> <li>• <a href="#">Launch Check In</a></li> </ul>	<ul style="list-style-type: none"> <li>• Implementer(s)</li> </ul>
After Launch		
One Week After Launch	<ul style="list-style-type: none"> <li>• <a href="#">Launch Follow Up</a></li> </ul>	<ul style="list-style-type: none"> <li>• Implementer(s)</li> </ul>
Ongoing Meetings		
Following Course Launch	<ul style="list-style-type: none"> <li>• <a href="#">Reviewing Your Data</a></li> </ul>	<ul style="list-style-type: none"> <li>• Executive Lead</li> <li>• Project Lead</li> <li>• Implementer(s)</li> </ul>
End of Each Term	<ul style="list-style-type: none"> <li>• <a href="#">Biannual Partnership Review</a></li> </ul>	<ul style="list-style-type: none"> <li>• All Team Members</li> </ul>
Prior to Academic Year	<ul style="list-style-type: none"> <li>• <a href="#">Training Plan Development</a></li> </ul>	<ul style="list-style-type: none"> <li>• Project lead</li> <li>• Implementer(s)</li> </ul>

## Building Your EVERFI Launch Team

In order to successfully launch EVERFI courses, many of our partners create teams and assign roles in order to ensure that the work is delegated. As a first step, we ask that you review the suggested roles and descriptions below and assign an individual from your institution to the team. To assign your team, please [click here](#) to complete the form. You will need their name and email address.

### Executive Lead:

The Executive Lead is the strategic decision maker at your institution. In many cases this is the person who signed the contract and rallied the team in their acquisition of this comprehensive prevention and compliance suite. This could include but is not limited to the personas of:

- President
- Vice President (Student Affairs or Human Resources)
- General Counsel
- Provost
- Chief Compliance Officer

The Executive Lead should plan to meet with their CSM for a partnership review at least two times per year for one hour. Their attendance is optional at all other scheduled meetings.

### Project Lead:

The Project Lead is a vital role as you plan to implement courses covering different topics. In many cases, institutions will launch the courses in conjunction with each other and assign different implementers to track continued progress. This could include but is not limited to the personas of:

- Title IX Coordinator
- Dean of Students
- HR Coordinator

Once the orientation process is complete, the Project Lead should plan to meet with their CSM each term as part of the yearly kick-off, partnership review, and data review. Their attendance is optional at all other scheduled meetings.

**Course Implementer:**

This individual is responsible for customizing, tracking progress, and reviewing data for specific courses. If you have purchased a course bundle that covers more than one subject area (Title IX, alcohol education, data security, etc.), you may want to identify different implementers by subject. This could include but is not limited to the personas of:

- Title IX Coordinator
- Counseling Center Staff
- Director of Athletics or Staff member
- AOD Coordinator

These individuals should plan to dedicate a minimum of 1-2 hours per week during the implementation period. They should also be present at the yearly kick-off, partnership review, and data review.

**IT Contact:**

The IT contact is important if you have purchased additional technical integrations. EVERFI will work directly with this contact to enable those integrations as well as reach out to this contact with continued maintenance updates. This could include but is not limited to the personas of:

- Director of Technology Services
- Developer

Your IT contact should plan to interact with the EVERFI team for all integrations. Time allotment is based on the number of integrations and resources available at your institution.

## Next Steps

As a next step, please complete the checklist below:

- Complete your [Launch Team Form](#)
- Send your team the [EVERFI Announcement Email](#)
- Schedule your Kick Off Call (if you haven't already!)

## Appendix

### Kick Off Call

The Kick Off Call is designed to align your desired goals and outcomes with your implementation strategy. This call is a high-level overview of our partnership, processes, and educational journey that your team will navigate in order to launch a successful prevention strategy in your community. This is an opportunity for your team to be formally introduced to the folks here at EVERFI who will help you and your team get up and running.

### Implementation Planning

Working with over 1,500 institutions, EVERFI has a strategic advantage to understand the most successful ways to implement our courses. The next milestone on your orientation journey is to learn about best practices in implementation. This touchpoint will provide you and the team with knowledge around course structure, timing, mandates, and more.

### IT Connect

If you have purchased a technical integration such as single sign-on or API, the EVERFI implementation team will work with your institution's IT team to start that process. This milestone will serve as an opportunity to better understand how you plan to use the integration and introduce the two teams.

### Administrator Training

Once you have had the opportunity to meet with your team and make some decisions based on the best practices milestone, you will meet with your Implementation Specialist to confirm your course selections and learn how to utilize the learning platform.

### Launch Check In

Prior to this meeting you will load all of your users, customize your courses, and set up assignments. This meeting will be used to review your configurations and confirm that your launch will be successful.

### Launch Follow Up

Once your course(s) is launched, it is critical to continue to follow up and share more about the content and participation. This session will focus on utilizing the tools within the EVERFI platform. You will explore and define procedures that you can implement on your campus.



### Reviewing Data

After a successful implementation, the next step is to share what you've accomplished and what you've learned about the attitudes and behaviors of your learners. This session will explore the resources available to you and demonstrate how you can utilize these resources to support your ongoing prevention planning.

### Biannual Partnership Review

This session will serve as an opportunity to ensure that we are on track to meet your training and partnership goals. We will also put a plan in place for the remainder of the year as it relates to the prevention and compliance needs at your institution. This meeting is generally scheduled towards the end of each term to ensure that we have time to make any training adjustments needed for the following term.

### Training Plan Development

The purpose of this milestone is to prepare for the upcoming academic year and the launch of your EVERFI courses. At EVERFI, we understand that training needs and compliance requirements can change year over year, so this provides us an opportunity to adjust your goals and approach to prevention education within your community.