

# ADVANCED TITLE IX HIGHER ED COORDINATOR

LIVE VIRTUAL TRAINING



# BEFORE WE GET STARTED...

- ✓ Not legal advice
- ✓ Materials
- ✓ Participation
- ✓ Repetition
- ✓ Breaks
- ✓ Posting link
- ✗ Recording
- ✗ Judgment



# ABOUT US

---

## OUR MISSION

To provide the best Care and Support for our clients, Community Partners, employees, contractors, collaborators, vendors, and all others who encounter our company.

## GOAL

To assist schools and districts in providing a safe and healthy learning and working environment for students, faculty and staff.







**Betsy Smith**  
Chief Innovation Officer



**Courtney Bullard**  
CEO



**Celeste Bradley**  
Chief Solutions Officer



**Amy Buck**  
Senior Title IX & Equity Specialist/Attorney



**Jocelyne Woodall**  
Title IX & Equity Investigator



**Brittany Gates**  
Title IX & Equity Specialist



**Tawny Alonzo**  
Title IX & Equity Specialist



**Lindsay Hatzis**  
Title IX & Equity Specialist/Attorney



**Kelsey Baker**  
Case Manager



**Erica D'Agostino**  
Title IX & Equity Specialist



# Agenda & Goals

- Compliance + Compassion
- Connection
- Growth



**Intro & Overview**



**Overlapping Legal Framework**



**High Risk and Complex Cases\***



**Informal Resolution & Appeal**



**Training , Prevention, & Data\***



**Athletics and Pregnancy**



**Policy & Program Evaluation**



**New  
Coordinator**



**Intermediate  
Coordinator**

**Advanced  
Coordinator**





NOT FOR REPRODUCTION





# What is Title IX?



“No person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any education program or activity receiving Federal financial assistance.”





**Support**



**Access**



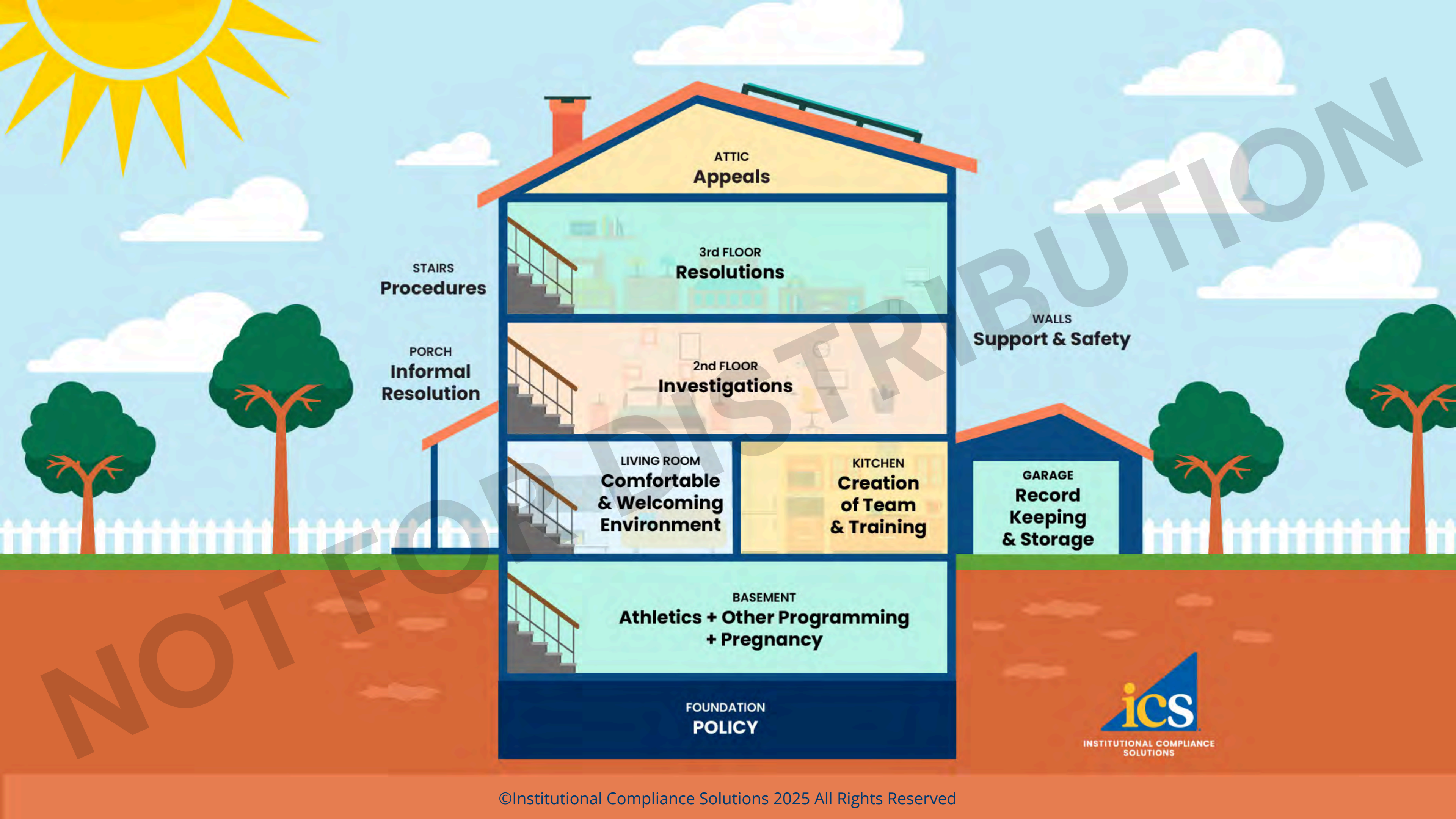


# Compliance + Compassion

**Title IX compliance is ineffective without compassion. Every decision you make should begin with compassion.**

- **Impact > Intent**





ATTIC  
**Appeals**

3rd FLOOR  
**Resolutions**

2nd FLOOR  
**Investigations**

LIVING ROOM  
**Comfortable  
& Welcoming  
Environment**

KITCHEN  
**Creation  
of Team  
& Training**

GARAGE  
**Record  
Keeping  
& Storage**

BASEMENT  
**Athletics + Other Programming  
+ Pregnancy**

FOUNDATION  
**POLICY**

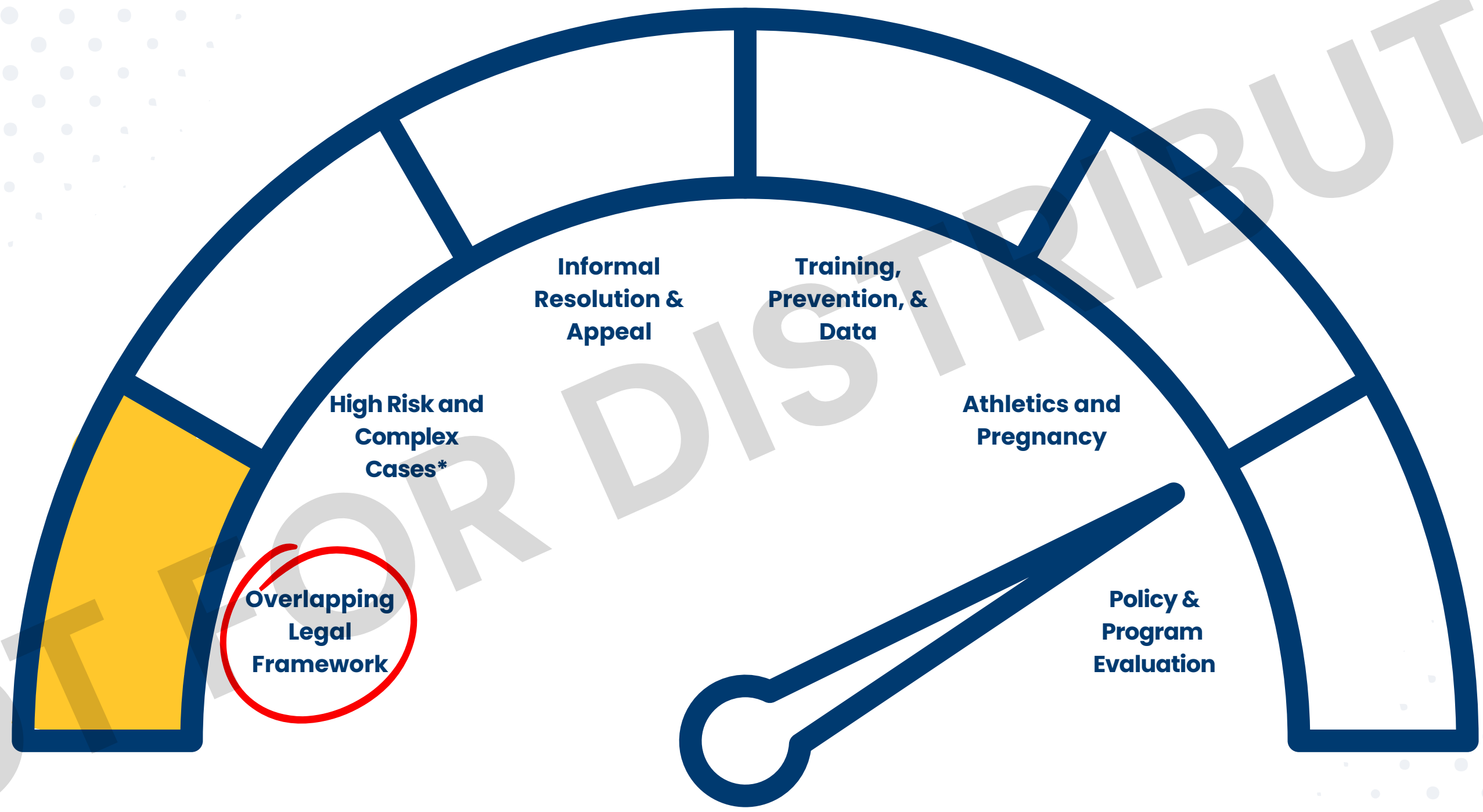
STAIRS  
**Procedures**

PORCH  
**Informal  
Resolution**

WALLS  
**Support & Safety**



NO FOR DISTRIBUTION







INSTITUTIONAL COMPLIANCE SOLUTIONS

## COMPLIANCE CUL-DE-SAC

**TITLE VI & VII**

**TITLE IX**

**ADA & 504**



**Clery & VAWA**

**FERPA**



# OWNERSHIP DOES NOT MEAN ISOLATION



- **Connections** are critical
- Lead relationship development
- Relationships drive success
- Mentorship
- Differentiate between immediate need and “not how I would do it”
- Listening is as valuable as doing









**Title VI & Title VII**



**Title IX**



**ADA & 504**



**Clery & VAWA**



**FERPA**

NOT FOR PUBLICATION





NOT FOR DISTRIBUTION



**Title IX**



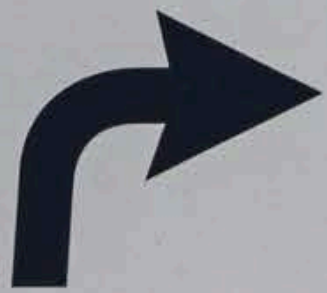
**FERPA  
Counsel**







**RULE**



**EXCEPTION**





# FERPA – It's Important but...

1

**Health & Safety**

2

**Planned Enrollment\***

3

**Judicial Orders and Subpoenas\***

4

**Title IX Outcomes**

5

**Directory Info**

\*Requires Reasonable Attempt to Notify



# FERPA Examples



## Directory Questions

- Local police call to find out whether an individual is currently enrolled
- Local police request a list of members of a club or organization



## Transfer

- ICS University requests student's disciplinary history
- Student-Athlete enters the transfer portal



## Health & Safety

- Emergency removal/trespass





**Title VI & Title VII**  
**Human Resources/**  
**Coordinator**



**Title IX**



**FERPA**  
**Counsel**

NOT FOR DISTRIBUTION





NOT FOR DISTRIBUTION







# Title VI & VII OVERLAP

1

**Empathy Driven  
Response**

2

**Process  
Similarities/Differences**

3

**New Roles  
Expectations**

4

**Heightened Focus &  
Attention**

5

**Communication Overload**



# Title VI & VII Examples



## Reporting

- Situation is reported to Title VI Coordinator and it involves Title IX and Title VI



## Investigating

- Matter involves investigation into sexual harassment and discriminatory harassment based on race. Same parties. Same fact patterns.



## Scrutiny

- National news picks up a report on Title VI response by institution





**Title VI & Title VII**  
**Human Resources/**  
**Title VI Coordinator**



**Title IX**



**Clery & VAWA**  
**Police & Student**  
**Conduct/**  
**Human Resources**



**FERPA**  
**Counsel**

NOT FOR DISTRIBUTION









# Clery & VAWA Connections

1

**Data Consistency**

2

**Patterns and Trends**

3

**Training**

4

**Timely Warnings**

5

**Non-Title IX Sexual Misconduct**



# Clery & VAWA Examples



## High Kick

- A matter is sent to Student Conduct that falls outside of the scope of Title IX but still involves relationship violence or sexual harassment



## Annual Report vs. Clery Report

- Reviewing all reports to ensure the numbers on both reports make sense and discrepancies are explained.



## Warning

- Timely warning is issued before a matter has been reported to Title IX





**Title VI & Title VII**  
Human Resources/  
Title VI Coordinator



**Title IX**



**ADA & 504**  
Disability Service &  
Human Resources



**Clery & VAWA**  
Police & Student  
Conduct/  
Human Resources

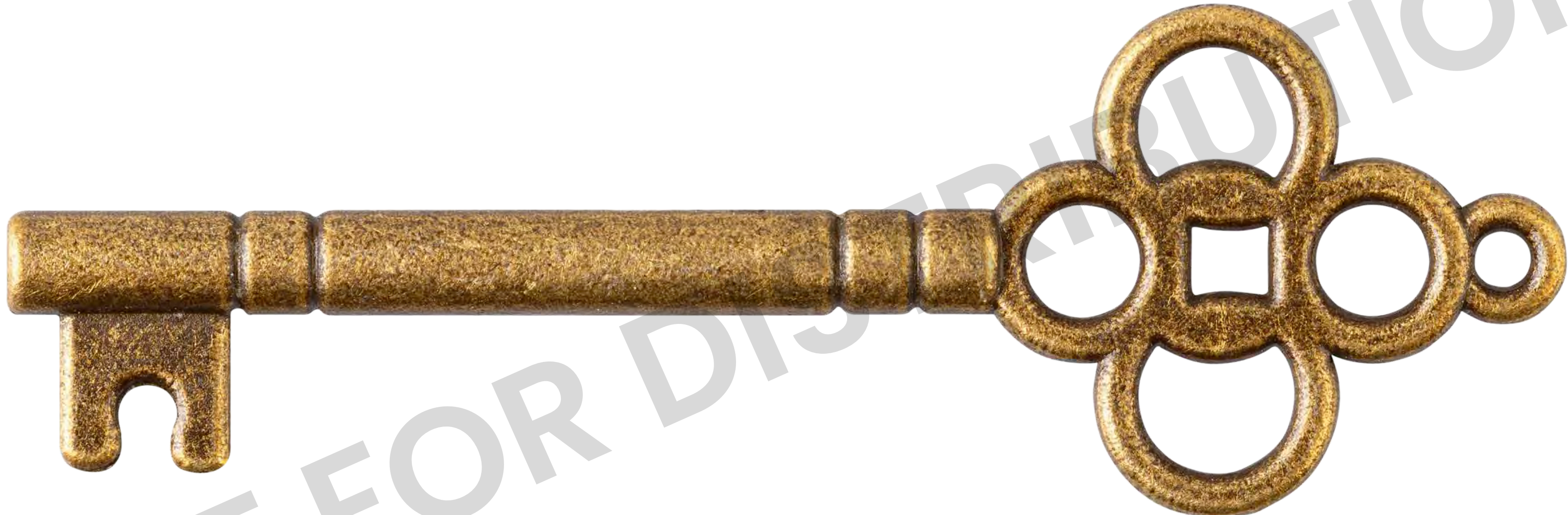


**FERPA**  
Counsel

NOT FOR DISTRIBUTION







NOT FOR DISTRIBUTION





# ADA & 504 Support

1

**Communication**

2

**Understanding**

3

**Physical Access**

4

**Support**

5

**Sanctioning**





# ADA & 504 Examples



## Sanction

- Student is reported multiple times for stalking. Student has registered with disability services and has a diagnosis of Autism.



## Hearing

- Employee is deaf and is going through the Title IX process.
  - Investigation
  - Hearing



## Physical Access

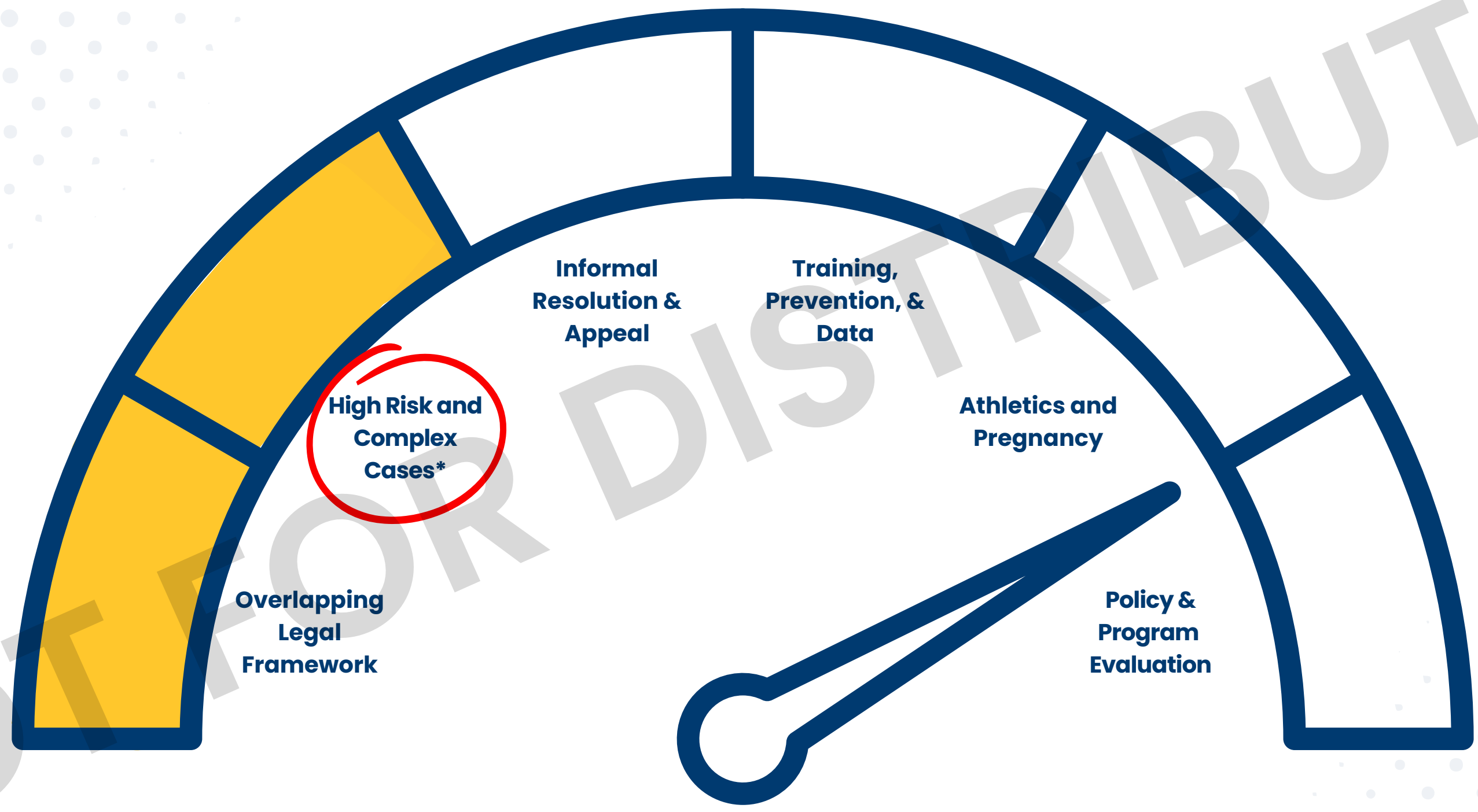
- Student is in a wheelchair & access to your office is challenging.



HOW ARE  
YOU?



NO FOR DISTRIBUTION





# High Risk & Complex Cases

01

## Spaghetti & Waffles

- Triage
- Intake

02

## Emergency Removal & Admin Leave

- When
- How

03

## Formal Complaints

- When to sign
- WRAP

04

## Dismissal

- Types
- WRAP





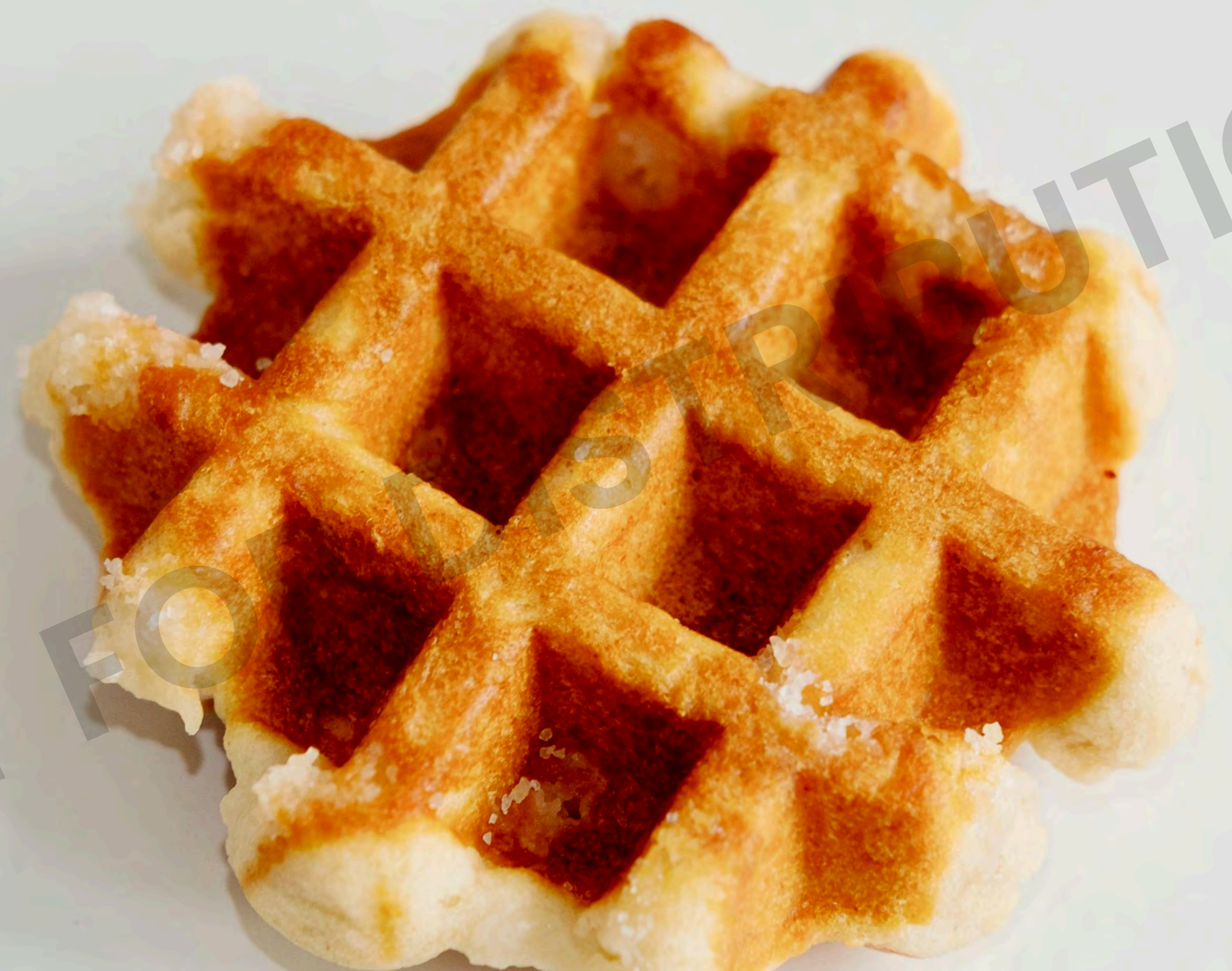
NOT

ION

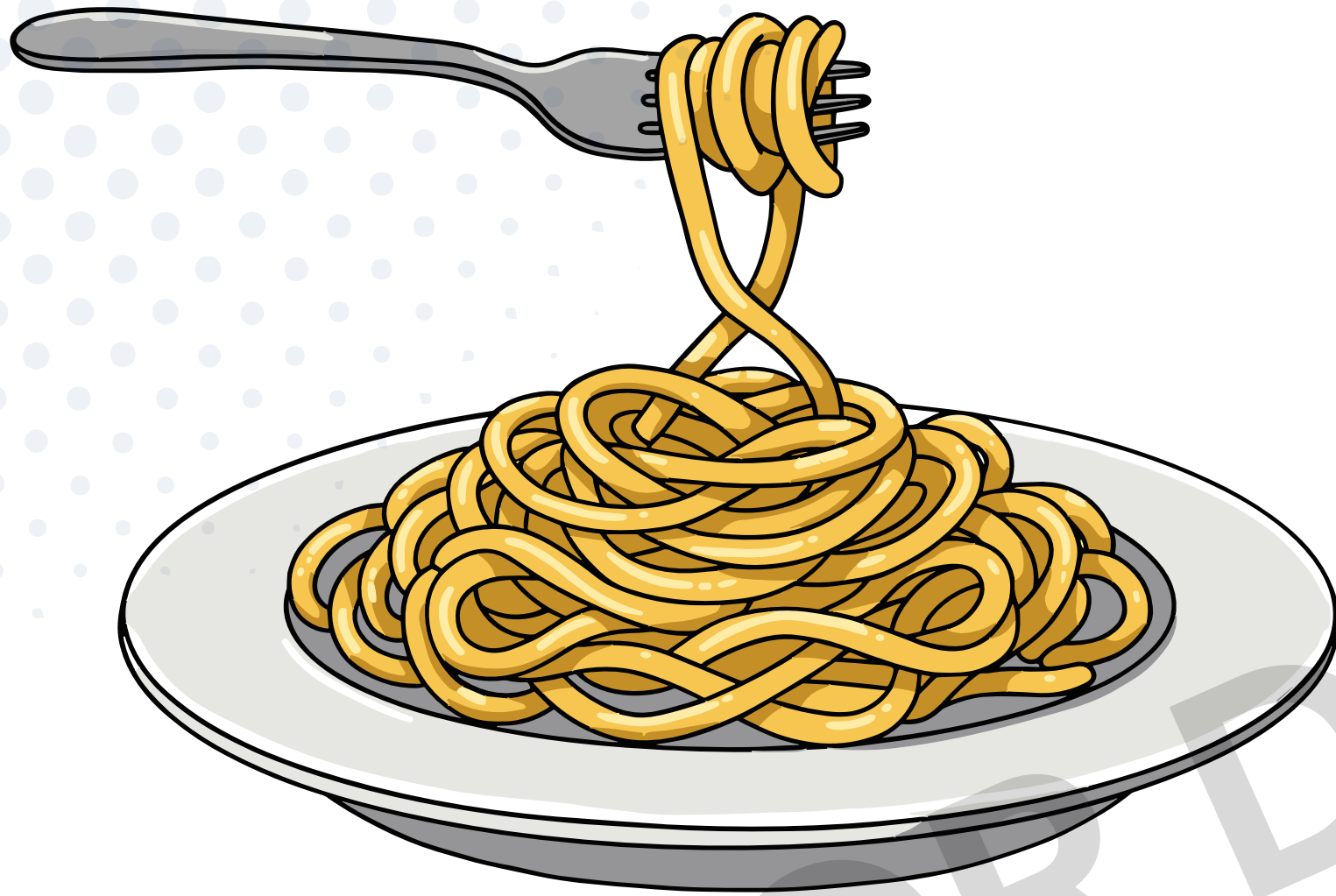




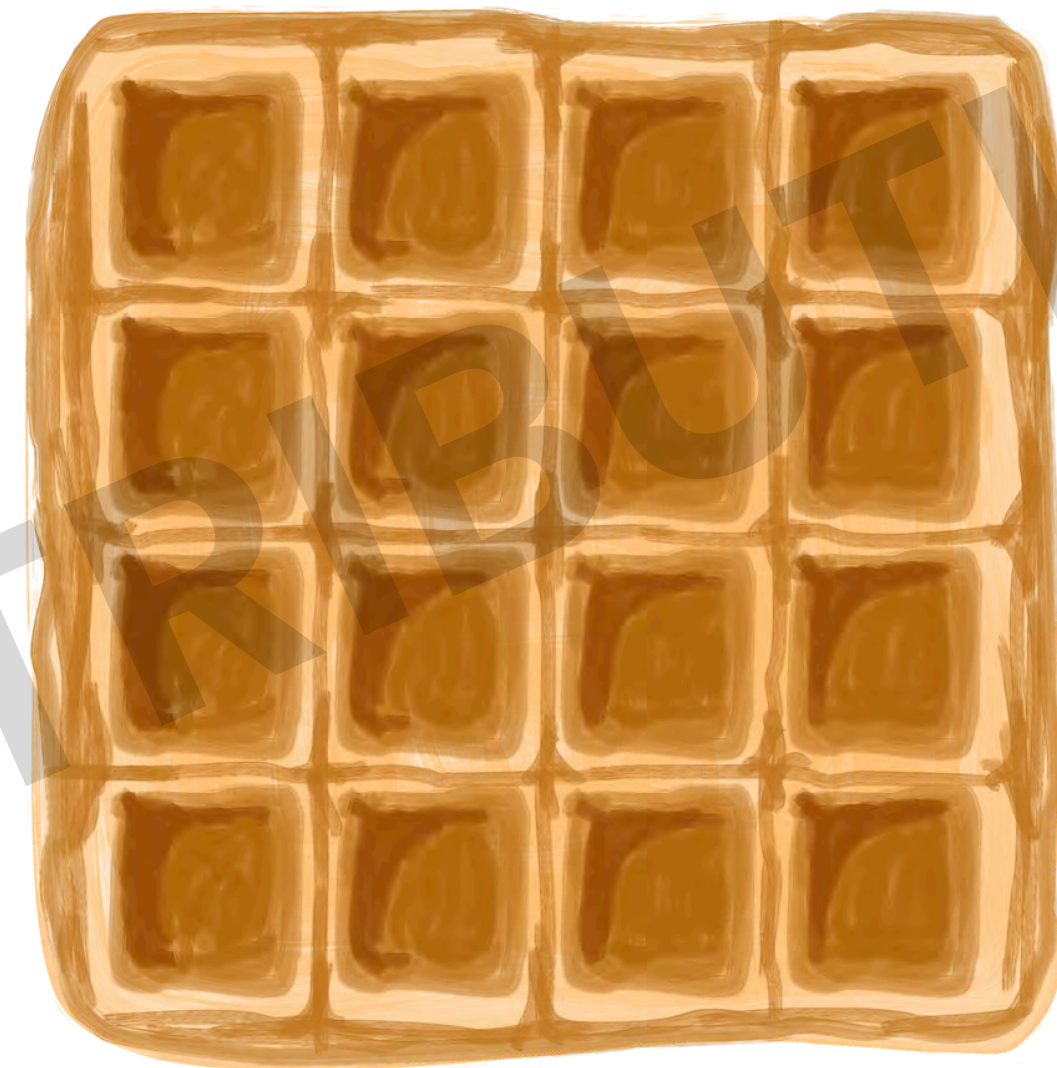
NOT FOR REPRODUCTION







*Reported  
Conduct*



Issues  
to  
Investigate

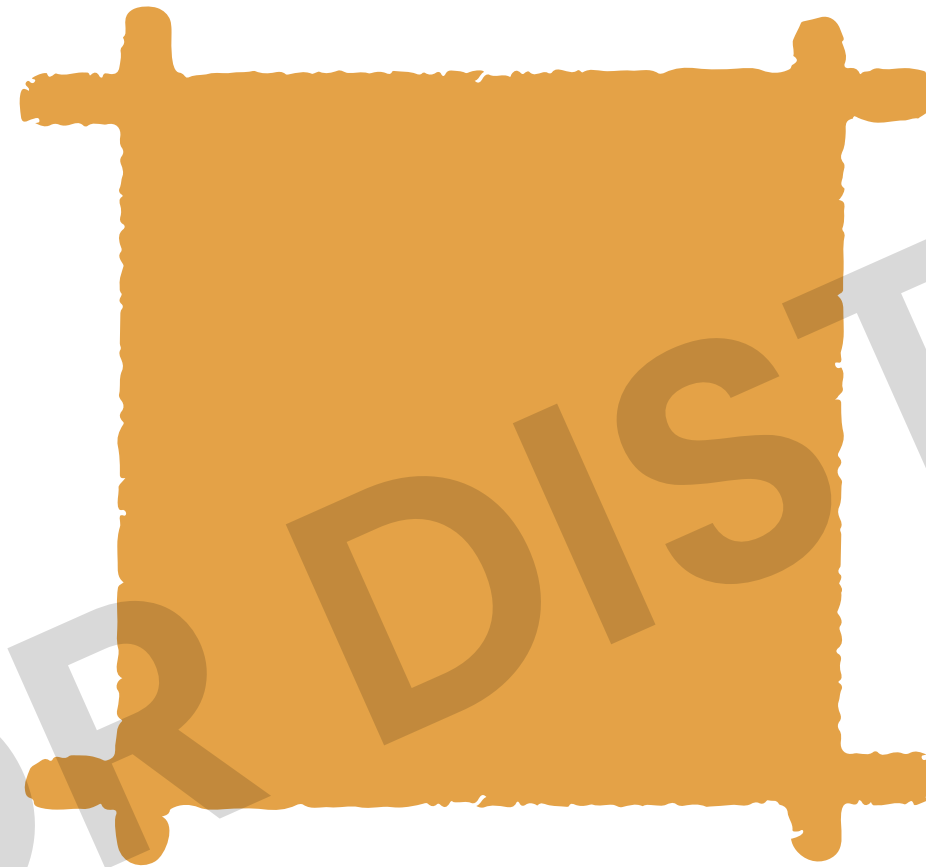




# Potential Policy Violations



(VI) Racial  
Discrimination



(IX) Sexual  
Harassment



Employee Code  
of Conduct





NOT FOR DISTRIBUTION



<u>Discrimination Based on Race</u>	<u>Discrimination Based on Disability</u>	<u>Employee Code of Conduct</u>
Performance Evaluations	Touching (back, shoulders, hand, and hair)	Leaving Early
Promotion Opportunities	Inappropriate Comments	Discussing Personal Employee Issues
Inappropriate Comments		







NOT FOR DISTRIBUTION



# EMERGENCY REMOVAL

*May remove student on an emergency basis AFTER undertaking individualized safety and risk analysis.*

## In order to remove a student, the institution must:

- undertake an individualized safety and risk analysis,
- determine that an immediate threat to the **physical health or safety** of any student or other individual arising from the allegations of sexual harassment justifies removal, and
- provide the Respondent with notice and an opportunity to challenge the decision immediately following the removal.





# ADMINISTRATIVE LEAVE

*May place employee on administrative leave during pendency of the grievance procedures.*

## Considerations

- Fewer barriers than emergency removal
- WITH pay
- Setting expectations on the front end





# Big Questions!

- Who makes the decisions?
- Threat Assessment involvement?
- Who informs the student/employee?
- How does student challenge removal?
- What are the expectations while on leave?
  - ex: social media





# Let's Discuss

Incident report received through student reporting database: Thomas and Suzy were in a romantic relationship. Thomas hit Suzy in the face causing significant swelling. Suzy's roommate, Ellie, tried to intervene and Thomas pushed Ellie into the wall, knocking a hole in the drywall. An RA entered the room because of the commotion. Thomas yelled at the RA to get out of the way. When the RA didn't move, Thomas punched the window, breaking the glass and cutting his hand. Thomas pushed past the RA and ran down the hall. He was later found standing on the edge of a parking garage by University Police. Thomas was taken to University Hospital for evaluation.





Handwritten signature in black ink on a white document.



NOT FOR REDISTRIBUTION



# FORMAL COMPLAINTS

*So simple....but SOOO complicated*

## **Must:**

- Allege Sexual Harassment
- Request Investigation
- Be Signed by Complainant OR Title IX Coordinator

## **Must NOT:**

- Investigate Without a Formal Complaint
- High Kick to another process if fits within Title IX definition, jurisdiction, and control





# **Big Question!**



**When/under what  
circumstances will  
Title IX Coordinator  
sign?**







# WRAP



**Weapon** or  
threat of  
weapon



**Repeat**  
violations  
(pattern)



**Access** to  
education  
(employee?)



**Physical** harm  
or threat of  
harm



# OTHER NOTES ON FORMAL COMPLAINTS

- If Emergency removal... Sign Away!
- What happens if determine it is not Title IX and/or need to dismiss/high kick?
- Be cautious about conflicts of interest or bias (perceived or actual) after signing.
  - When providing support
  - When serving as investigator





# Let's Discuss

Adam was admitted to the hospital after suffering severe dehydration. It was determined that he was a new member of Insta Kappa Comp fraternity. While at the hospital he also reported a sexual assault, anal penetration with a pool stick, and physical exhaustion from lack of sleep and physical requirements. The hospital connected Adam with a counselor at the University. After meeting with the counselor and discussing with his parents, Adam gave the counselor permission to tell the Dean of Students.

Adam does not want to be identified or sign a formal complaint.





NOT



OR DISTRIBUTION





# DISMISSAL OF A FORMAL COMPLAINT

*Even MORE complicated...*

## **Must Dismiss (Mandatory) High Kick Permitted**

- Not Title IX on its face (doesn't fit in a bucket).
- No control over location/event or Respondent.
- Didn't happen in U.S.

## **May Dismiss (Permissive)**

- Complainant request IN WRITING.
- Respondent no longer enrolled or employed.
- Specific circumstances prevent school from gathering evidence sufficient to reach a determination.



Requirements





# CHALLENGES WITH MANDATORY DISMISSAL

- Sounds like you don't care (who has this conversation)
- Follow through by the other offices
- Updates on outcome
- Tracking patterns and trends
- Discussion pre signing a formal complaint





# CHALLENGES WITH PERMISSIVE DISMISSAL

- Safety
- Prevention
- Expectations (Complainant in Control?)
- Pass the problem





# Consider your WRAP



**Weapon** or  
threat of  
weapon



**Repeat**  
violations  
(pattern)



**Access** to  
education  
(employee?)



**Physical** harm  
or threat of  
harm



# NOTICE AND APPEAL OF DISMISSAL

*GIANT missed step*

**After dismissal of a formal complaint:**

- **MUST** promptly send written notice of dismissal and reason for dismissal to **BOTH** parties
- **BOTH** parties receive opportunity to appeal dismissal of a formal complaint

\*Very limited appeal options





# Big Questions!



- How will you decide?
- Are you being as consistent as possible while considering each situation independently?
- Are you allowing the appeal and notifying appropriately?
- How is your documentation?



# Let's Discuss

Lindsay reported to her RA that Sam raped her in her residence hall room after they were drinking together.

You receive the report and note that you have received 3 prior reports with Sam regarding alleged rapes after drinking together. Lindsay does not want to sign a formal complaint because Sam is on the basketball team and a high profile student-athlete. You sign the formal complaint anyway.

- Lindsay sends a written request asking you to dismiss the formal complaint.





# Let's Discuss

Amanda submits a formal complaint via email to you that James sexually assaulted her. You initiate the formal grievance process and later learn that the incident occurred in James' off campus apartment and outside of your "control."

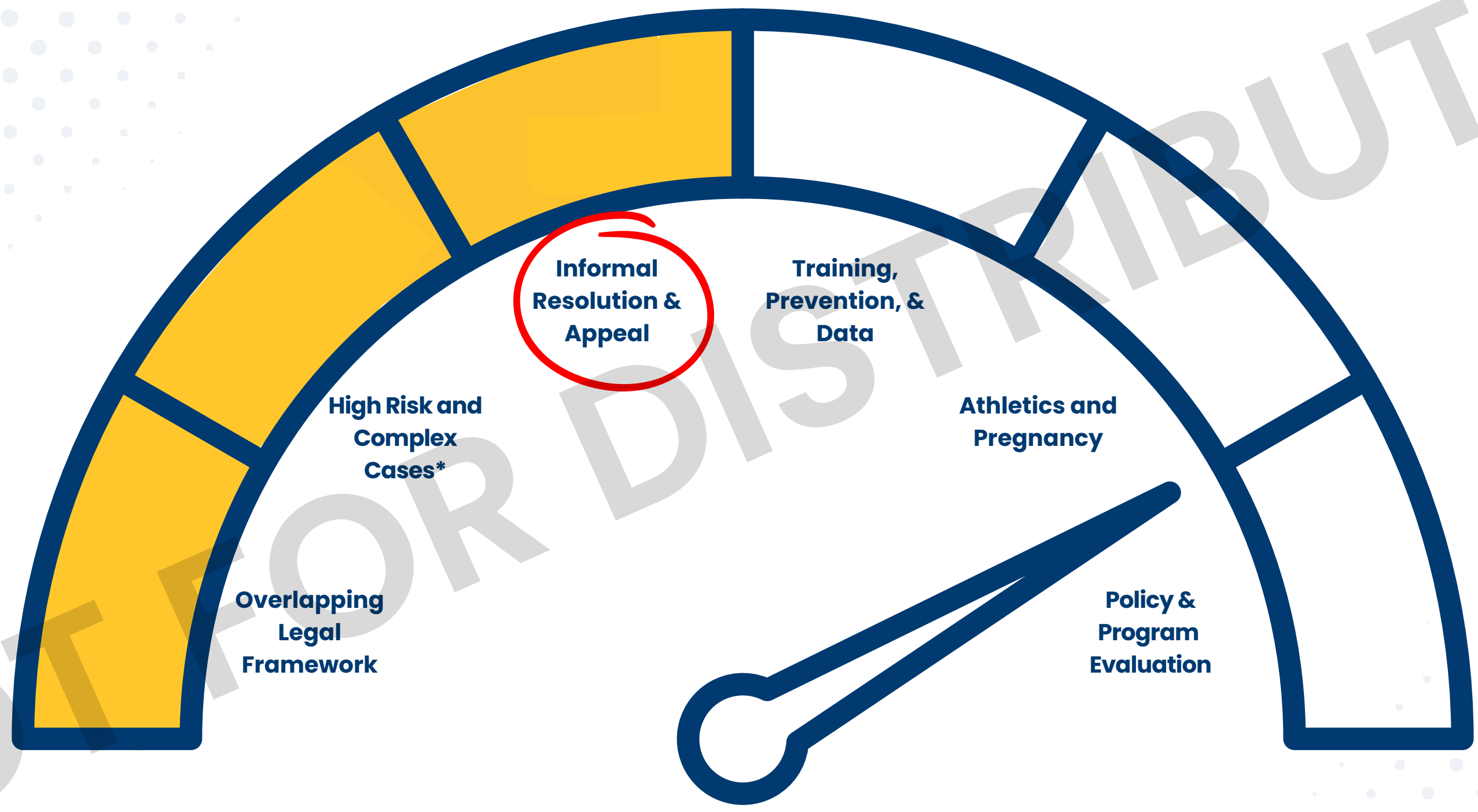








NO FOR DISTRIBUTION





# Appeals

01

## Basis

- 3 required options

02

## Gatekeeper

- Who
- How are they notified

03

## Bias/Conflicts/ Backbone

- Perception
- Shared information
- Tough decisions

04

## Training

- Not optional



# APPEALS

- Offered to BOTH parties
- Of dismissal of formal complaint OR determination regarding responsibility
- On the following basis:
  - **Procedural irregularity** that affected the outcome of the matter.
  - **New Evidence** that was not reasonably available at the time the determination regarding responsibility or dismissal was made that could affect the outcome of the matter.
  - **Bias/Conflict** - Title IX Coordinator, Investigator, or Decision-Maker had a conflict of interest or bias for or against Complainants or Respondents generally or the individual Complainant or Respondent that affected the outcome of the matter.
  - Additional basis if offered equally to both parties.









# GATEKEEPER

- Who is your guard/gatekeeper to evaluate whether an appeal is “valid?”
- How are parties notified if an appeal has been filed but is not “valid?”
- Do they have an opportunity to re-file?



NOT FOR PUBLICATION



# Let's Discuss

After a formal process where Jared was found responsible for stalking, he files an appeal based on “new evidence” and “procedural error.”

- He alleges the new evidence includes a screen shot of text messages he forgot to include in the information he provided to the investigator and an additional witness who he did not previously name because he didn't want to “get her involved.”
- He alleges the procedural error is because the Notice of Allegations had to be updated in the middle of the process because the location was incorrect in the original Notice.







FOR DISTRIBUTION

1:1 Notes



# TRAINING FOR APPELLATE OFFICERS

- Full plates
- Least prepared
- Lack of understanding
- Most power
- Extreme pressure
- Outcome oriented
- Focused on perception





# Informal Resolution

01

## Set your Standard

- What is a “no go”?

02

## The “Right” parties

- Who are they?

03

## Preparation

- Pre-meetings
- During meetings
- Post meetings
- Follow up

04

## Investment

- Time
- Resources
- Training



# INFORMAL RESOLUTION

## Set your standard

- What is an absolute NO?
- What are the expectations?
- What type of process will you consider?
- Is it possible to have a “finding of responsibility?”
- How much “effort” will you put in when parties are not putting in the work?
- Who will facilitate and how have they been trained?





# Consider your WRAPS



**Weapon** or  
threat of  
weapon



**Repeat**  
violations  
(pattern)



**Access** to  
education  
(employee?)



**Physical** harm  
or threat of  
harm



**Student**  
complainant &  
employee  
respondent



# INFORMAL RESOLUTION – PARTIES

- Participatory
- Realistic goals, expectations, outcomes
- Understanding responsibility/ownership
- Reparation of harm = focus
- Less severe
- Supported



NOT FOR DISTRIBUTION



# INFORMAL RESOLUTION- PREPARATION

*Unexpectedly exhausting*

## Stages

- Preparation pre-process (including notice)
- Pre-meeting
- Support/advisor meeting
- Individual meeting
- Combined meeting?
- Post meeting agreement
- Outcome letter & expectations





# INFORMAL RESOLUTION- INVESTMENT

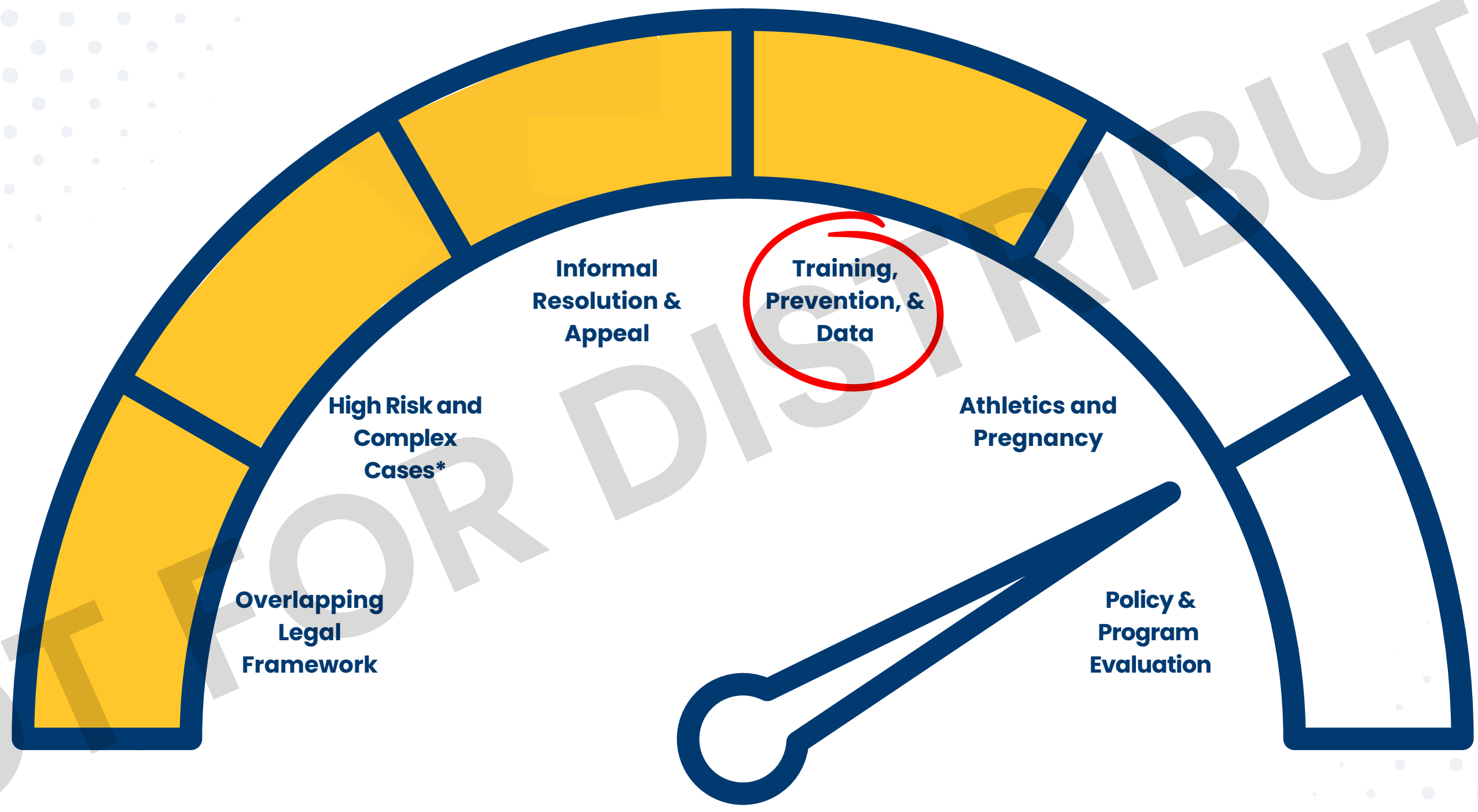
- Time/Resources
  - Coordinator
  - Facilitator
  - Training
- Energy
- Emotional toll
- Outcome Goals...worth it?



NOT FOR DISTRIBUTION



NO FOR DISTRIBUTION





# Training, Prevention, & Data

01

**Data**

- It's the driver

02

**Prevention**

- Connected to the data

03

**Training**

- Effective
- Connection
- From a bystander perspective

04

**Put it all together**

- The ANSWER!





Prevention

Data



# DATA - THE DRIVER OF PREVENTION & RESPONSE...

- Understand what is happening
- Create training and prevention plans
- Break down barriers to reporting
- Assess your progress
- Make big "asks"
- Develop sustainable processes
- Embrace your creativity





# Let's Discuss



The Title IX Office has received 4 distinct reports related to the “squirrel club.” Each situation has occurred at or related to a squirrel club event.

- How do you know who is a member of squirrel club?
- What are your next steps (other than formal grievance procedures)?







# TAILORED PREVENTION—A GIANT “CONNECT THE DOTS”

- If you ask the right questions, the answers will lead you to the next steps
- Great data = Effective prevention
- Incomplete data = Less effective prevention
- Three step plan
  - Analyze the data
  - Assess your capacity
  - Create the most effective plan





# Response Fuels Prevention



## How the process made them feel

- It's more than the outcome



## Credibility

- Following the process earns credibility



## People talk

- Most often when we get it wrong







# TRAINING – THAT MAKES A DIFFERENCE

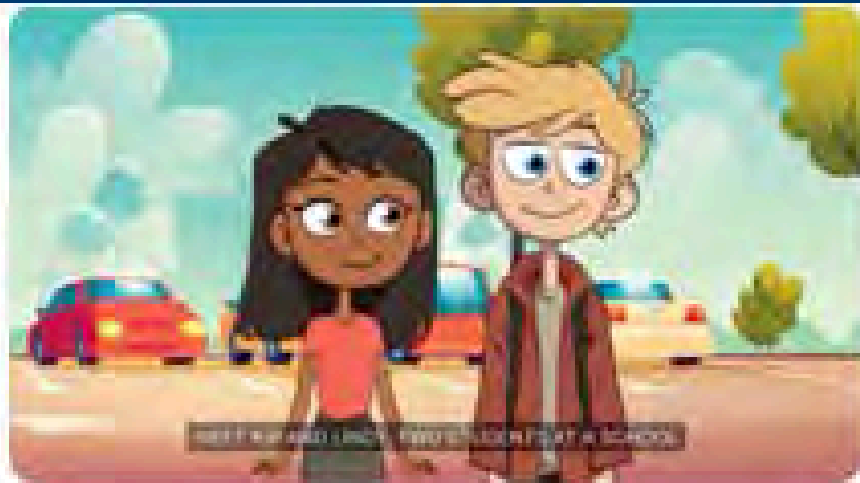
- Clarity
- Perspective (bystander)
- Approachability
- Connection
- Assessment of effectiveness (data still matters)



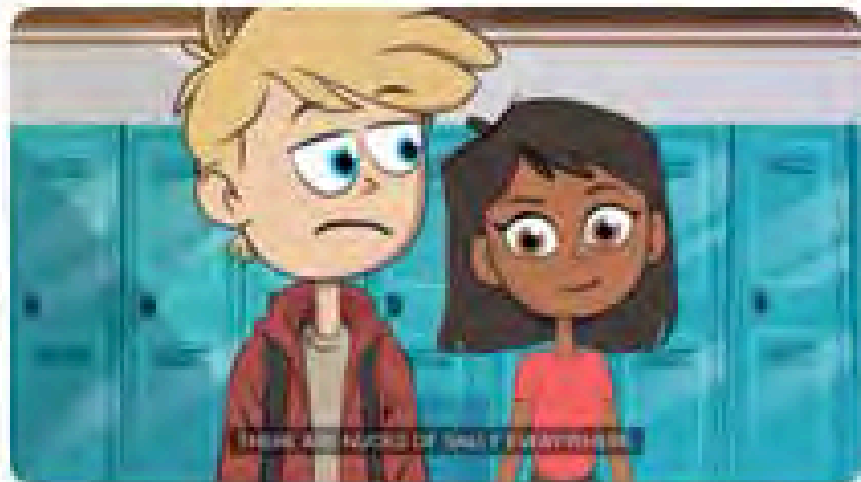
NOT FOR DISTRIBUTION



# YOUR RESPONSE MATTERS



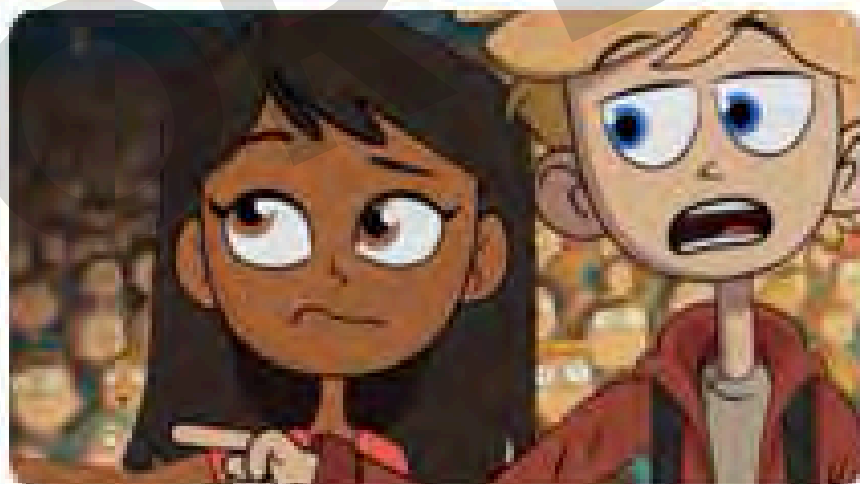
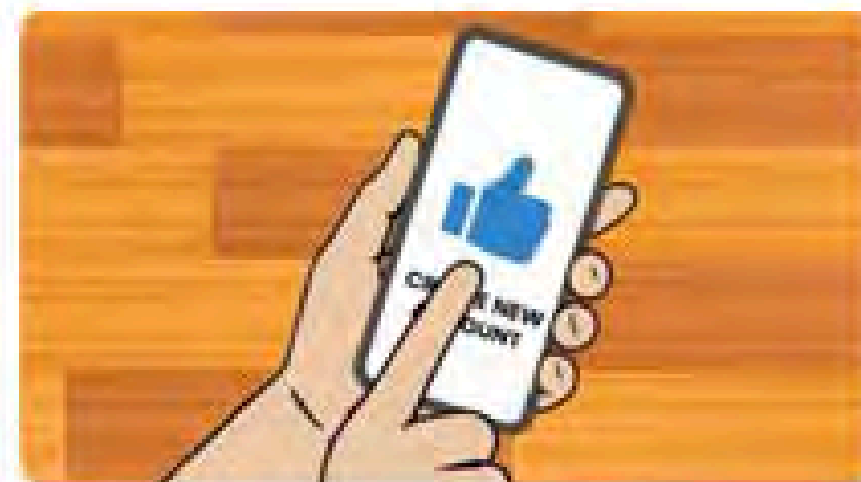
Walking away and ignoring the incident does not protect your classmates, but reporting



What are the possible outcomes of sharing someone's nude photo?

- a) Hurt feelings
- b) Disciplinary action from the school
- c) Legal trouble
- d) All of the above

Ⓜ MAKE AT ANY POINT TO CHOOSE ANSWER



What should Kip or Link do in this situation?

- a) If safe, step in and discourage the group's behavior
- b) Talk to a member of the group after the game about why their behavior is offensive
- c) Report the incident to a teacher or school employee
- d) All of the above

Ⓜ MAKE AT ANY POINT TO CHOOSE ANSWER





# Training Barriers



## Resources

- Where does it fit within your budget?
  - What is your budget?
  - Who manages your budget?



## Time

- When will the training be received?
- When will the training be created?



## People

- Who will create the training?
- Who will conduct the training?







# FALL 2025 VIRTUAL TRAINING DATA

Through 10-14-2025





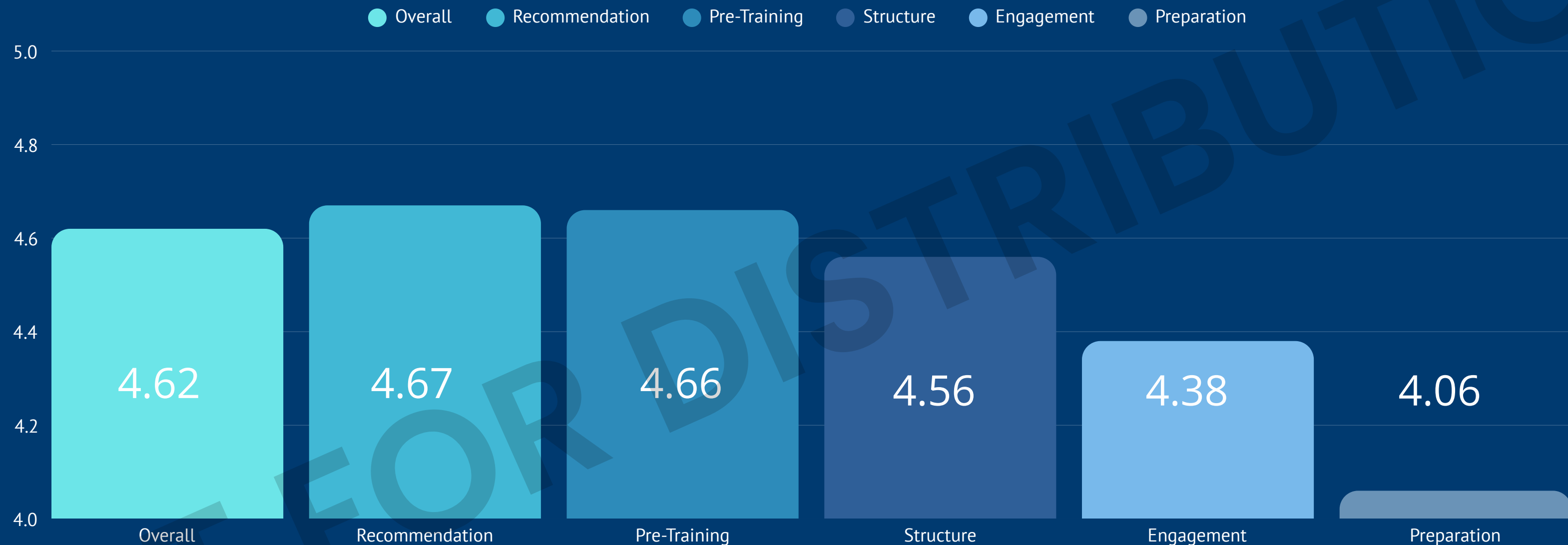
49%

RESPONSE  
RATE





# QUANTITATIVE SUMMARY DATA



**Overall, how would you rate the training?**

**Would you recommend this training to a friend or colleague?**

**How do you rate the coordination and communication from ICS leading up to the training?**

**How effective was the structure of training in helping you understand topics and concepts?**

**Did you find it easy to remain engaged until the end?**

**How prepared do you feel to serve in your Title IX role after participating in this training?**





# QUALITATIVE SUMMARY DATA



Courtney



Erica



Celeste



Betsy



Amy



Tawny



Brittany



Lindsay

Thanks for sharing your expertise with clarity and the just-right level of "this is serious, everyone."

Thank you so much for all of the great information. A lot of information to reflect on.

Loved her added insight.

Amazing! Your knowledge and how you help us learn is so well mastered! Nice work!

Clear and meaningful info

Very engaging

Very engaging

Lindsay was really helpful at answering questions in the chat and I really appreciated how she drew connections between TIX investigations and Title VI,

Very clear in your communication, thank you!

Thanks for answering my questions in the chat!

I appreciate your examples.

She was great as an online presenter balancing info and compassion.

Very informative!

Wonderful presentation. Great information.

Was able to provide really helpful examples that were very helpful

So clear and filled with lots of practical examples as usual. thank you!

I appreciate you sharing your professional background and how it applies to our Title IX roles.

Celeste is an energetic presenter. I appreciated the audience participation and hope it can be better integrated into future presentations. (e.g., Zoom polls)

She spoke with candor and enthusiasm which eased my concerns about Title IX.

Similar to Celeste, Amy is a fine presenter. More structured interactive learning components versus hours of lecture is appreciated to keep

Very helpful!

I appreciate you sharing your professional background and how it applies to our Title IX roles.

She answered some great questions!

Appreciate the knowledge about Title VI

Betsy was wonderful! Great communication, very engaging/interactive training, and I would definitely take a training with her again!

Appreciate the knowledge about Title VI

Excellent! Thanks for supporting me!

Awesome! Thank you for your time!

Fantastic presenter! Celeste really made the content relatable and was affirming when folks made comments or had questions. Only feedback would be sometimes Celeste was a little fast on switching through some slides.

NOT FOR DISTRIBUTION





PROGRESS

---

PERFECTION





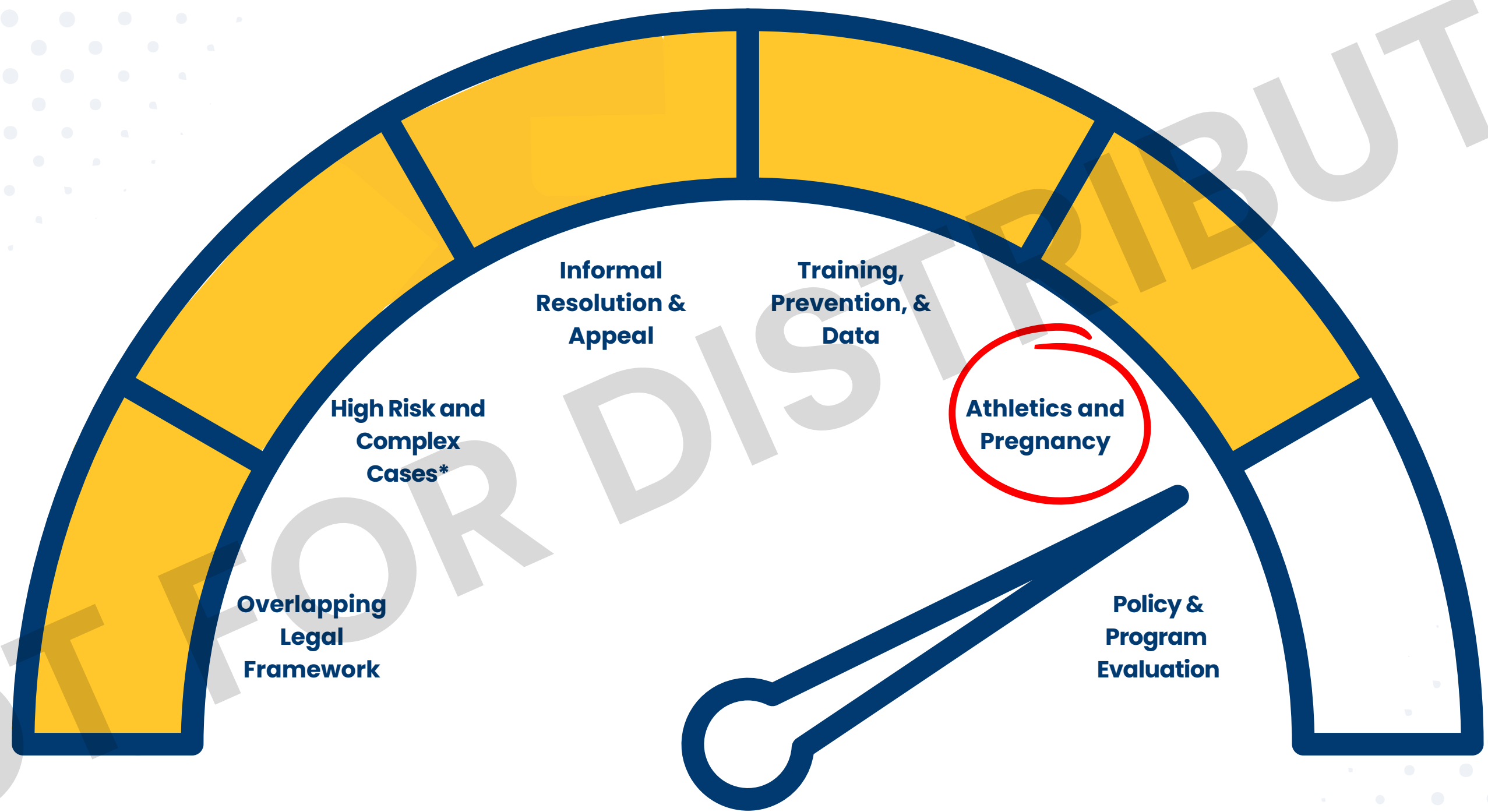
# FINAL EXAM



A+<sup>+</sup>



NOT FOR DISTRIBUTION













# Athletics Equity & Pregnancy

01

**Who**

- Support

02

**What**

- Process and procedures

03

**When**

- Evaluation of programs

04

**Why**

- Heightened Expectations



# PREGNANCY SUPPORT

- Who are concerns reported to?
  - employee concerns
  - student concerns
- What is that person's title?
- Deputy?





# ATHLETICS EQUITY TITLE IX SUPPORT

- Who are concerns reported to?
- What is that person's title?
- Who is supposed to respond
- Deputy?



NOT FOR DISTRIBUTION



# Policies



**Search...**



NOT FOR DISTRIBUTION



# EVALUATION OF ATHLETICS PROGRAMMING

- Don't wait until someone complains
  - facilities
  - game/event schedules
  - number of athletes
  - coaching criteria/job postings
  - opportunities
- Equity walks





# HEIGHTENED FOCUS

- Female sports/Equity
- Discrimination on the basis of...
- Media
- OCR priorities
- Litigation



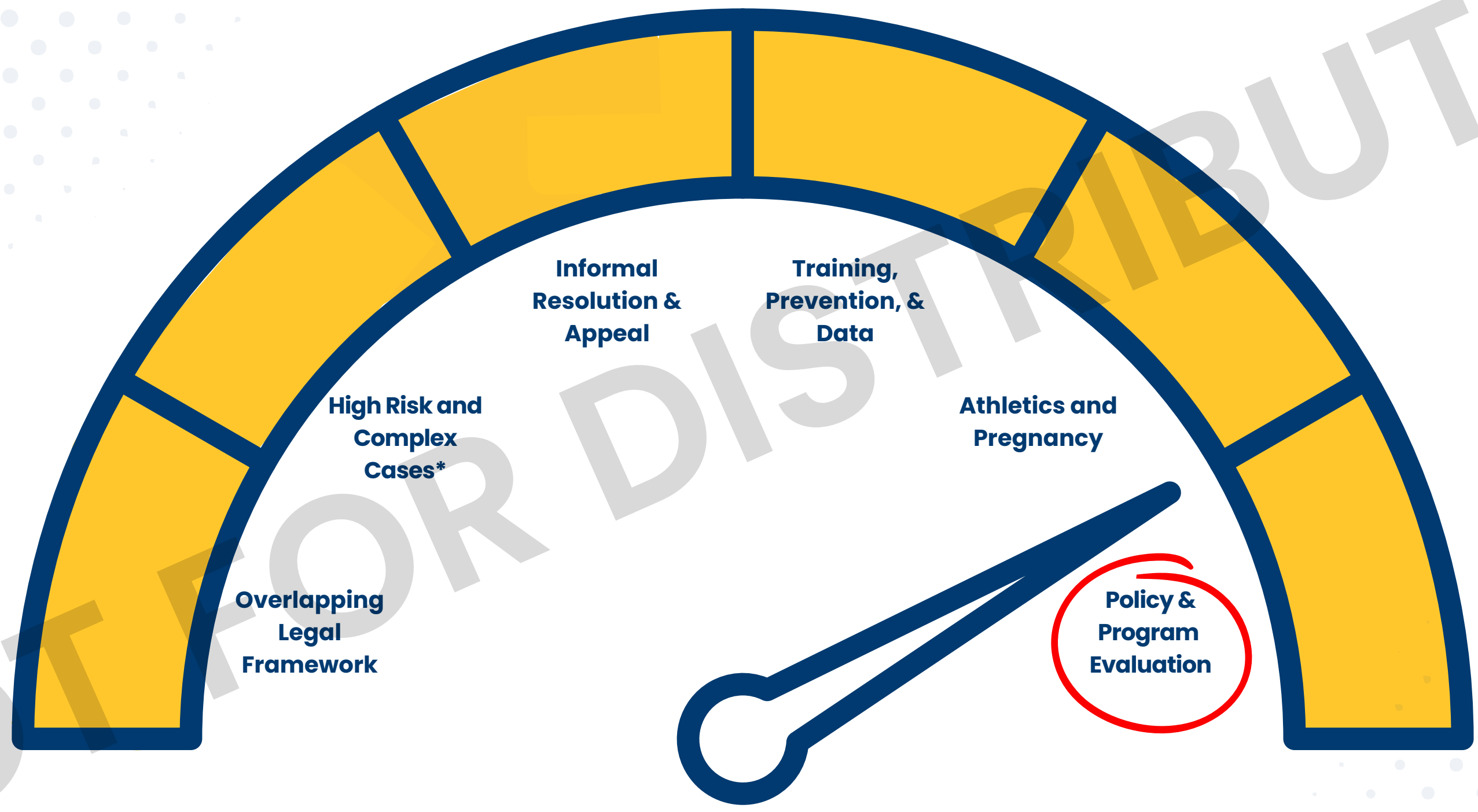
NOT FOR DISTRIBUTION







NOT FOR DISTRIBUTION





# Policy Musts

01

## Law

- Is the policy compliant with the law?

02

## Accessible

- Is the policy accessible?

03

## Follow

- Is the policy being followed?

04

## Use friendly

- Is the policy user friendly?
- Flow charts?











# EVALUATION OF PROGRAMS/OFFICES

- Hard look
- Not personal
- Internal
- External
- Open to change
- Manageable next steps







# Compliance + Compassion

1

**The Formula**

2

**The Impact**

3

**The Environment**





# The Magic Formula

**Kindness**

**+**

**Transparency**

**+**

**Patience**



# Compassion











# The Human Factor

1

**This work is hard**

2

**Mistakes will be made  
but correction is critical**

3

**Laugh at yourself**

4

**Support each other**

5

**Celebrate small victories**





# Help Us Help You



**Please fill out  
the survey.**







**YOU'VE  
GOT THIS!**



NOT FOR DISTRIBUTION







**TITLE IX**  
**UNIVERSITY**

**HIGHER EDUCATION**

PRESENTED BY INSTITUTIONAL COMPLIANCE SOLUTIONS