

# Institute Enrollment Policy

## 1. Overview

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The *SHRM Linkage Institute* ("The Institute") is an immersive learning experience designed to empower leaders to advance and become purposeful leaders in the workplace; an event by SHRM Linkage ("Company"). The curriculum includes expert keynote speakers, skill-building leadership sessions and workshops, and strategic networking opportunities with leaders from organizations throughout the world.

## 2. Scope of Policy

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This Institute Enrollment Policy ("the Enrollment Policy") applies to each participant in The Institute taking part virtually and/or in-person ("Participant") as well as the organization that such Participant represents ("Client"). As noted below, this Enrollment Policy shall also apply with full force and effect to Learning Circle Participants and the On-Demand Participants as those terms are defined herein.

## 3. Assessments

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Participants in The Institute are given access to certain proprietary assessments. Specifically, in-person participants gain access to either the *Advancing Women Leaders 360° Assessment*, *Purposeful Leadership 360° Assessment* ("360° Assessment"), or *360° Inclusive Leader Assessment* ("Inclusive Leader Assessment"). Participants who take part as Keynotes Only gain access to the *Advancing Women Leaders Self-Assessment* or *Purposeful Leadership Self-Assessment* ("Self-Assessment"). Collectively, the various 360° Assessments and Self-Assessments are referred to in this Enrollment Policy as "the Institute Assessments."

The Institute Assessments produce standard electronic reports. These assessment results and reports are not designed to serve as the sole basis for any employment decision (promotion, termination, etc.) on the part of Client with respect to any of the Participants assessed.

Participants to be assessed can be changed with written notice at least seven (7) days prior to the launch date for the Institute Assessment.

Institute Assessments must be completed by Participants within the launch window indicated in the accompanying email. Institute Assessments will not be relaunched to Participants who failed to complete their Institute Assessment during the agreed-upon time frame. Once launched, an Institute Assessment may not be transferred to another Participant. Company is not obligated to regenerate reports that have already been distributed.

Any Participant who purchases an All-Access Pass or is added to an All-Access Pass group less than thirty (30) days but up to seven (7) days prior to the opening date of The Institute will receive the Self-Assessment rather than the 360° Assessment. Any Participant who registers or is added to a group less than seven (7) days prior to the opening date of The Institute will not receive an Institute Assessment.

## 4. Consent to Communication and Sharing of Data

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By participating in The Institute, each Participant hereby consents to Company contacting such Participant directly on multiple occasions before, during, and after The Institute. In addition, by participating in The Institute, each Participant in The Institute hereby consents to Company sharing information that identifies such Participant individually and makes it possible for other parties (namely, sponsors, partners, and affiliates in The Institute) to contact such Participant directly. Such contact may occur on multiple occasions before, during, or after The Institute, with Company ensuring that each such sponsor, partner, or affiliate in The Institute provide the Participant with the ability to "opt out" from receiving such communications from any such sponsor, partner, or affiliate at any time and for any reason. Information or data shared while participating in The Institute will be treated in accordance with SHRM's privacy policy, which can be found on <https://www.shrm.org/about/privacy-policy>.

## 5. Health and Safety

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Company prioritizes the health and safety of everyone connected to The Institute (including Participants and Clients, as well as partners, staff, etc.). To that end, we continue to monitor any disease, pandemic, or epidemic situation vigilantly, making sure that we are complying with the latest guidance on best practices for health and safety as provided by relevant government and health agencies as well as tracking relevant public health data, including, but not limited to, vaccination rates/metrics.

## 6. Cancellations

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- **For Individual or Team:** If Client wishes to cancel the participation in The Institute for the Participant or the team of Participants (whatever the case might be), then Client may do so only by providing Company with written notice. In such instance, Client shall be liable for a cancellation fee that equals (i) 25% of the total tuition fee if Company receives written notice at least ninety (90) days prior to the opening date of The Institute, or (ii) 100% of the total tuition fee if Company receives written notice less than ninety (90) days prior to the opening date of The Institute. Client shall pay such cancellation fee within thirty (30) days of the date of cancellation.
- **For Premier Partner or Institute Partner:** If Client wishes to cancel the participation in The Institute as a Premier Partner or Institute Partner, then Client may do so only by providing Company with written notice. In such instance, Client shall be liable for a cancellation fee that equals (i) 50% of the total Partner fee if Company receives written notice at least one hundred fifty (150) days prior to the opening date of The Institute, or (ii) 100% of the total Partner fee if Company receives written notice less than one hundred fifty (150) days prior to the opening date of The Institute. Client shall pay such cancellation fee within thirty (30) days of the date of cancellation.
- **For International Delegations:**
  - **Visa Invitation Letters:** Company will issue visa invitation letters to any delegate who has completed the registration process. Company cannot issue support letters to delegates who are not registered and paid in full. A link to a personalized visa support letter will be shared with registered delegation leaders.
  - **Transfers:** If Client's delegate cannot attend the SHRM Linkage Institute 2026, the delegate may transfer its registration to the SHRM Linkage Institute 2027. They must notify SHRM Customer Experience before the start of the SHRM Linkage Institute 2026. Requests received on or before Monday, August 31, 2026, will not incur a fee. Requests to transfer after Monday, August 31, 2026, will incur a \$250 fee per delegate. All transfer requests must be made in writing. To request a transfer, please email Linkage Customer Experience at [linkage-customerservice@shrm.org](mailto:linkage-customerservice@shrm.org).
  - **Registration Refunds:** Company will issue full refunds in the event of visa denial. To request a refund, please contact SHRM Customer Experience at [linkage-customerservice@shrm.org](mailto:linkage-customerservice@shrm.org). All other refunds will be issued according to SHRM Linkage's Cancellation Policy.
  - **Hotel Refunds:** All hotel agreements are separate agreements. Such agreement will be strictly between Client and the hotel, with Company having no obligations, liability, or any involvement whatsoever relating to such agreement. Please note a signed agreement with the hotel is non-cancellable. Any related inquiries regarding hotel agreements must be directed to the hotel.

## 7. Participant Rosters, Qualifications, and Substitutions

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- **Participation Roster:** If Client is participating with a team of Participants or multiple Participants, then Client shall send Company a roster of Participants ("[Participant Roster](#)"). Participant Rosters provided to Company less than sixty (60) days before the opening date of The Institute will be subject to a \$250 administrative fee per Participant on the Participant Roster.
- **Qualifications:** Participants must be legally permitted to receive Company service and not subject to any U.S. trade sanctions. U.S. trade sanctions generally restrict Company from providing products and services to, or engaging in business with, any individual or organization that is (1) organized in, a resident of, or located in, a country or region subject to comprehensive sanctions, such as Cuba, Iran, North Korea, Syria, Crimea, Luhansk People's

Republic, and Donetsk People's Republic regions of Ukraine or (2) identified on a U.S. Government prohibited party list, including the U.S. Specially Designated Nationals List (SDN List) maintained by the U.S. Department of Treasury Office of Foreign Assets Control (OFAC) (collectively, "Sanctioned Person"). By a Participant attending, the Participant and the Client represent and warrant that the Participant is not a Sanctioned Person. In the event the Client becomes aware that a Participant that Client has registered is subject to U.S. trade sanctions, Company must be promptly notified in writing and a substitute requested.

- **Substitutions:** Client may substitute one Participant for another at no charge with written notice of ten weeks (10 weeks) or more before the opening date of The Institute. Substitutions made less than ten (10) weeks before the opening date of The Institute will be subject to a \$250 administrative fee per substitution made. Substitutions made less than thirty (30) days before the opening date of The Institute will result in the substitute Participant receiving the Self-Assessment rather than the 360° Assessment, where applicable. Substitutions made seven (7) days or less before the opening date of The Institute will result in the substitute Participant not receiving an Institute Assessment.

## 8. Ticket Transfers and Registration Fees

### Ticket Transfers in General

- a. For any ticket type transfer, Client is responsible for the change in value at the then-current ticket rate. All notifications of transfer must be provided to Company in writing. If Company receives notification of transfer within sixty (60) days of the event, a \$250 transfer fee per Participant will apply.
- b. Only one transfer is permitted per Client.
- c. No transfers are permitted within 30 days of The Institute.
- d. All tickets must be used within the calendar year in which The Institute is taking place. Unused tickets cannot be deferred (i.e., rolled over) to the next calendar year, future iterations of the program, or other SHRM events.
- e. In-Person tickets are limited and, therefore, based on availability.
- f. All new fees and costs associated with transfer will be due within 30 days of notification of change.
- g. Premier Partners or Institute Partners should refer to their contract for ticket type transfer options.

### Ticket Transfer Price Differentials

- a. **Virtual to In-Person:** The original value of purchase can be applied toward the then-current in-person pricing, with the Client responsible for the price differential and any applicable change fees. In-Person tickets are limited and, therefore, based on availability.
- b. **In-Person to Virtual:** No refund will be issued on the price differential (if less than original fee paid by Client); however, the credit may be used toward any Institute ticket type, until ticket sales are closed, at current pricing at the time of notification.

### Additional Fees

Changes to Client's tickets or participation level in The Institute shall be subject to mutual agreement and may be subject to changes in pricing in light of Company's pricing structure and other considerations.

### Exclusions

The various ticket and registration fees for participation in The Institute do not include all costs associated with travel and hotel costs to The Institute, Board meetings, and other Institute-related events. All travel-related costs will be the sole responsibility of Participants and/or Client (whatever the case might be) and not Company.

## 9. Pre/Post-Institute Learning Program (Coaching)

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### Overview

Some Participants in The Institute who take part in The Institute in-person or virtually may, at an additional cost, also take part in coaching sessions (“the Coaching Sessions”) as an add-on to their Institute experience. Such Participants will be referred to herein as “the Coaching Participants”).

### Learning Components

Coaching Participants who purchase a Coaching package, may take part in either (i) one (1) ninety-minute (90) virtual coaching session, or (ii) three (3) sixty (60)-minute virtual coaching sessions referred to herein as (“the Coaching Sessions”).

### General Applicability of Policy

The provisions of this Enrollment Policy shall apply with full force and effect to the Participants, On-Demand Participants, the Coaching Sessions, and the Coaching Participants.

### Additional Special Provisions

- Participation in the Coaching Sessions is strictly on an individual and unique basis. As such, in the absence of the prior and explicit written consent of Company, a Coaching Participant cannot transfer, share, or substitute his, her, or their participation in the overall Coaching Sessions.
- The Coaching Sessions shall end the shorter of once the requisite sessions have been held by **Friday, February 26, 2027**. As such, participation in or use of any of the Coaching Sessions may not extend beyond **Friday, February 26, 2027**.
- For the Coaching Sessions, the relevant Company coach shall work with the Coaching Participant and/or the Client (whichever is applicable) to schedule such Coaching Sessions. The Coaching Participant and/or the Client (whichever is applicable) shall be permitted to cancel and reschedule a scheduled Coaching Session, but only upon **24 hours’ notice** to the coach and only on a one-time basis. Any other cancellation of a Coaching Session shall result in the forfeiture of that Coaching Session.

## 10. On-Demand Participation

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### Overview

Some leaders will take part in The Institute after the live event by purchasing available on-demand packages. Such participants will be referred to herein as “On-Demand Participants,” and such participation will be referred to herein as “On-Demand Participation.”

### General Applicability of Policy

The provisions of this Enrollment Policy shall apply with full force and effect to On-Demand Participation in The Institute, with On-Demand Participants being deemed as part of the definition of “Participants” for purposes and application of this Enrollment Policy.

### Additional Special Provisions

- On-Demand Participation in The Institute is strictly on an individual and unique basis. As such, in the absence of the prior and explicit written consent of Company, an On-Demand Participant cannot transfer, share, or substitute his, her, or their On-Demand Participation in The Institute.
- On-Demand Participation in The Institute shall end on the date specified upon enrollment. As such, On-Demand Participants may not access the various elements and aspects involved with their On-Demand Participation after such date.

## 11. Virtual Access

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Virtual participation and access to The Institute involves (i) certain Participants live and in real time during The Institute, and/or (ii) On-Demand Participants as part of On-Demand Participation described in paragraph 10 above (collectively, “Virtual Access”). **Such Virtual Access is intended for individual device viewing and individual use only on a per Participant basis. Any group viewing or sharing of Virtual Access among multiple individuals is strictly prohibited.**

## 12. Institute Materials

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All materials, guides, tools, and other intellectual property used, reproduced, or distributed to Participants and On-Demand Participants directly related to this policy and in connection with The Institute (collectively, “Institute Materials”) shall be the sole and exclusive property of Company. Participants and On-Demand Participants may access and utilize such Institute Materials, but only for the limited purposes provided. Any other unauthorized use of such Institute Materials is strictly prohibited.

## 13. Onsite Photography and Recording Consent

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In registering for The Institute, Client consents to Company photographing, audiotaping, and/or videotaping Client at The Institute, as well as to Company using the resulting photographs, audiotapes, and/or videotapes for educational and business purposes for its own accounts.