

CDISTRIBUTOR E-MAIL POLICIES

BACKGROUND AND PURPOSE

E-mail is a highly effective communication tool for higher education. Recognizing this, CSU developed its own tool for sending e-mails to our alumni, donors and other constituents, CDISistributor. Over time, the ease of use of the tool has, while obviously a huge benefit to our efforts, has led to an abundance of e-mail communication and a lack of coordination and strategic use. In an effort to optimize the use of e-mail by the Colorado State University Division of Advancement and its campus partners, the following policies and guidelines are suggested.

The policies were formed through a collaborative committee consisting of central development stake-holders and representatives from colleges and units who are frequent users of the tool. The goals of our committee are as follows:

- Better serve our constituents
- Minimize spam threats
- Minimize opt-outs
- Minimize multiple e-mail touches
- Manage workloads for those affected by e-mails
- Be customer service oriented
- Encourage better e-mail marketing practices

ACCESS

Employees of Colorado State University with a job responsibility to communicate electronically with CSU constituents are eligible for access to the Advance database and CDISistributor, the system CSU uses to send emails to constituents. Access requests must come from within the development office in the college or division. Student employees who are granted access must be supervised by someone who also has access and training in CDISistributor.

With limited exceptions and prior approval, all development e-mail communications at CSU must be sent through CDISistributor. Users found sending development e-mail through other systems will have their access to Advance re-evaluated.

Access to CDISistributor will be granted upon completion of training.

Users who have not utilized CDISistributor for more than six months will lose access to CDISistributor. In order to regain access, users must retrain in the use of CDISistributor.

All users will be required to attend annual refresher training on the use of the scheduler tool, CSU style and brand standards, and best practices.

LISTS - RECIPIENTS

Users are limited to recipient lists that include their own constituents. Colleges are limited to their own alumni and donors. Alumni and donors with multiple affiliations to CSU will fall into several lists, based on their affinities. Lists owned by specific units (VTH clients, UCA patrons, Athletics ticket holders, CoCoRaHS, etc.) are excluded from this limitation.

Centralized University Advancement Offices (Alumni Association, Annual Giving, Events) may mail to all alumni and donors for the purposes of communication and solicitation.

University units (Athletics, Student Affairs, Libraries, Enrollment and Access, etc.) must seek approval from Development Communications (who will work closely with DAIS) if an e-mail will be sent to more than 10,000 constituents, unless all recipients are constituents of the area (i.e. season ticket holders, CSU parents, etc.).

Colleges and units are required to collaborate with central advancement offices for communications to groups with no direct affinity.

All users must adhere to special handling requests (do not E-mail, do not contact, do not solicit, etc.).

SCHEDULER

The scheduler allows e-mail users to plan their e-mails and view high-activity days for e-mail. The tool is intended to manage the coordination of all communication – mail and e-mail.

All e-mails must be placed on the Scheduler as a placeholder, regardless of if there is a recipient list pulled. E-mails must be placed at least three business days prior to the scheduled send date. For example, if planning to send an e-mail on Friday, the communication list should be pulled at least three days prior to that day OR if a list has not yet been identified, users must go to the scheduler directly and enter the communication manually at least three days prior to the send date.

Exceptions will be granted for high-priority unanticipated announcements.

In order to prevent spam issues, e-mails with lists of 10,000 or more are limited to three per day. However if a high level of overlap occurs between lists, e-mails could be delayed. E-mails added to the scheduler first will be given priority; unanticipated announcements may take precedence over previously scheduled e-mails. In the event of a conflict, all efforts will be made by Development Communications to identify a workable compromise and senders will be notified that their email may be delayed.

If multiple groups cannot reach a resolution, the Senior Associate Vice President for Operations will make the final decision.

CONTENT

In an effort to limit the number of overall opt-outs, and to ensure that as many individuals as possible will receive electronic development communications all e-mails sent through CDISistributor should serve a development purpose. Development purposes include: solicitation, engagement, development events, newsletters, stewardship.

All e-mail content must follow University graphic identity policies. E-mails must follow CSU Style and subsequently AP Style.

The sender e-mail address must reflect the unit sending the e-mail. E-mails sent from the general "Colorado State University" e-mail will be rejected in review unless prior approval is given by Development Communications.

REVIEW

All e-mails will be reviewed by Development Communications for subject matter, grammar, and style. Prior to queuing any e-mail, senders must send test e-mails to themselves and to multiple e-mail clients to check formatting, links, content, and subject lines.

E-mails drafted by students must be reviewed by a professional staff member before being queued for review.

Development Communications requires three days for review.

If an e-mail needs to go sooner than three business days from the date it is queued, senders can check a box to indicate that it should go as soon as possible, however, actual timing is subject to the reviewers' workloads and other e-mail conflicts.

Alumni Association and CSU Events and Constituent Engagement Exception

The CSU Alumni Association and the Office of CSU Events and Constituent Engagement will have an exception to the three-day review process for e-mails that, due to the changing circumstances of events, must be sent immediately and may not have the time for a three-day review process. The exception applies to two types of situations:

- *In an effort to reduce the number of urgent e-mails, both offices will have an option to queue e-mails for approval before a list is attached. These e-mails will be subject to the normal three-day review timeline, and as long as no changes are made once they are approved by Development Communications, they can be mailed as soon as a list is attached.*
- *In the case that event related e-mail content is not available for the three-day review period, e-mails will be exempt from review by Development Communications. However to ensure that they are properly reviewed for CSU style and correct dates, links, etc., these e-mails will be*

reviewed by a communications professional in the other office. For example, an e-mail marked as "urgent event-related" in the CDISTributor system by the Alumni Association will be sent to the designated staff member in CSU Events for review, and vice versa. It is up to the offices sending these e-mails to communicate with each other to ensure timely delivery of these e-mails.

IMPLEMENTATION

The policy will be presented to University Advancement leadership for approval in August.

Upon approval of the policy, the Computing Systems team will need one to two months to implement the new technical aspects of the program. During that time, the policy will be presented to the Division as well as to all users of CDISTributor.

New user and refresher trainings (for users who have not used CDISTributor in six months) will be altered to include the new policies.

The first refresher/best practices training sessions will take place in early 2014, and every six months thereafter (January and June).