



## Policy on DAR-related e-communications

**Policy Type:** Administrative

**Responsible Office:** Office of Development and Alumni Relations

**Initial Policy Approved:** 05/2009

**Current Revision Approved:** 5/2018

### Policy Statement and Purpose

All official business e-communications with donors, alumni and prospects must be coordinated with the Office of Development and Alumni Relations' Communications office.

The DAR Communications and Online Services groups develop and send electronic communications to alumni and donors. These items include e-newsletters, email campaigns, solicitations, event notifications, etc. In certain circumstances and with prior, written approval from the senior director of DAR Communications and the executive director of Advancement Services, other email systems can be used.

A constituent should not receive more than one e-communication per day from any VCU unit. It is important to schedule emails in advance, keeping in mind posted turnaround times. Emails sent to the entire alumni and/or donor base have priority. All e-communications to donors, alumni and prospects must include an opt-out mechanism. Each e-campaign is limited to two emails. An e-event campaign can include up to four emails:

- Two invitations or one save-the-date and one invitation
- One reminder to registrants only
- One thank you email (that can be segmented to attendees and nonattendees)

Emails to fewer than 50 constituents, board members or committee members are considered personal interactions and should be sent from a personal email. These communications must be recorded individually in RADAR as an interaction. Emails to alumni that do not have a development or alumni message, such as accreditation surveys, are not governed by this policy. Exceptions can be made on a case-by-case basis with approval by the senior director of DAR Communications, in consultation with DAR leadership.

Units are permitted to communicate electronically only with donors, alumni and constituents who are affiliated with that unit. If a unit wishes to communicate electronically with donors, alumni or constituents



who do not have an affiliation with that unit, the unit must acquire written permission from the senior director of DAR communications in consultation, as applicable, with the unit and the DAR vice president's senior staff. The senior director of DAR communications, in consultation, as applicable, with the vice president's senior staff, must approve any electronic communication sent to the entire alumni base.

Turnaround times established by DAR and defined on the DAR intranet must be followed for development and deployment of e-communications. Any major changes or additions to the e-communication or the recipient criteria could result in the rescheduling of the e-communication.

All members of the Development and Alumni Relations team must adhere to the Commonwealth of Virginia's Use of Internet and Electronic Communications Systems (Policy 1.75). The Online Services team will monitor e-communications and other content posted on internal and external websites. Any conduct violations will be addressed under Commonwealth of Virginia's Standards of Conduct Policy (Policy 1.60).

The purpose of this policy is to maintain the value and quality of e-communications from VCU and its individual academic and administrative units to donors, alumni and prospects. When multiple e-communications are received on the same day, they often lose value in the eyes of the constituent leading to decreased open and click-through rates.

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## Who Should Know This Policy

All university employees engaged in activities related to development and alumni relations are responsible for knowing this policy and familiarizing themselves with its contents and provisions.



## Definitions

### **Official business e-communications**

E-communications that pertain to any fundraising, donor, prospect, alumni or university-affiliated foundation activities, including, but not limited to, solicitations, event notices, surveys, e-newsletters and updates from units.

### **Advancement Services' systems**

All systems managed by Advancement Services, including, but not limited to, RADAR, Development and Alumni Relations intranet and Internet sites, online reporting center, online giving and payments, online event registrations and event registrations, e-communications, alumni website and alumni portal.

### **Direct marketing associate**

DAR Communications team member assigned to work with unit clients to provide strategy, lists, e-communications and reports from RADAR.

### **Direct marketing effort**

A direct marketing effort is created in RADAR to house all components of any DAR-related business communication. DAR-related business communications are ones that pertain to any fundraising, donor, prospect, alumni or university-affiliated foundation activities, including, but not limited to, publications, solicitations, event notices, surveys, emails and acknowledgements.

### **E-newsletters**

E-newsletters are in-depth e-communications that include multiple news items, links and pictures, and possibly forms.

### **E-blasts**

E-blasts are one-time communications, such as event notices, save the dates, news announcements, etc.

### **E-solicitations**

E-solicitations are communications, either one-time or recurring, that ask constituents to make a gift. E-solicitations will always require either a link to give.

### **Recipient list**

The recipient list is the list of emails to which an e-communication is sent.

## Contacts

The Office of Development and Alumni Relations officially interprets this policy. The Office of Development and Alumni Relations is responsible for obtaining approval for any revision as required by the policy



Creating and Maintaining Policies and Procedures through the appropriate governance structures. Please direct policy questions to the senior director of Development and Alumni Communications.

## Policy Specifics and Procedures

### 1. Request and delivery:

- Step 1: The email requestor must receive approval from the unit dean or director to email the desired recipient group
- Step 2: Submit an Advancement Services Help Desk request
  - To expedite creation of your request, please make sure this form is complete and all content is attached to the request.
  - Review the DAR calendar (<http://staff.oda.vcu.edu/calendar>) before choosing a send date. Remember, each constituent should receive, at most, one email per day.
  - Email project turnaround times [See DAR staff intranet] must be adhered to when scheduling emails. Turnaround times begin when all information and content is received by DAR Communications. If all information and content is not received in sufficient time to meet the turnaround guidelines, the email is rescheduled.
  - When a ticket is submitted, the email is automatically entered on the DAR staff calendar for planning purposes. Requestors do not need to create a separate calendar entry.
- Step 3: The DAR Communications office reviews requests and approves or adjusts, as necessary, the requested send date and the list criteria. DAR emails only constituents with RADAR records; any exception must be approved by the executive director of Advancement Services.
- Step 4: DAR Communications reviews email content, enters appropriate data into RADAR and facilitates the approval process before the email is deployed.
- Step 5: DAR Communications builds and tests emails, as well as pulls queries to develop the list of constituents specified in the request to be emailed.
- Step 6: A final round of internal testing is conducted using a variety of email clients (AOL, Gmail, Hotmail, Lotus) once final approval is received. Emails must be approved by noon the day before the scheduled send date. If approval is not received from the requestor, the email is rescheduled.
- Step 7: All emails are scheduled for delivery at 10 a.m. on the requested send date. Different send times are available on request.
- Step 8: The correspondence, open rate, click rate, unsubscribes and bounced emails are available on each constituent record in RADAR.
  - Invalid emails are marked as such.



- If a constituent unsubscribes from one email, he/she is unsubscribed from all emails sent via DAR.
- Step 9: The direct marketing associate share the Mailchimp report with the client the day after the email is sent.
- Step 10: When managing the calendar, the Communications team follows this hierarchy:
  - Communications sent to the entire alumni and/or donor base have priority. No additional emails can be sent on a day that the entire alumni and/or donor base will receive an email.
  - Priority 1: E-newsletters. These will rarely, if ever, be moved from the scheduled send date. These should be scheduled well in advance.
  - Priority 2: E-blasts. These might be added to calendar closer to mail date, but units are encouraged to schedule these well in advance and submit the content closer to the send date.
  - Priority 3: E-solicitations. These should be scheduled well in advance and have flexibility in mail date if an urgent e-blast needs to send on the same day.

## 2. Opt-out standard

- All e-communications must include an option to unsubscribe from future e-communications.
- DAR emails must adhere to the opt-out standard developed by the Direct Marketing Association and its subsidiary, the Association of Interactive Marketing. This standard applies to all of the DMA/IMA members, many of whom are the nation's largest nonprofits who use direct marketing to raise funds. Their online standards were adopted in January 2002.

## 3. University standards

- All e-communications must include a link to the university or VCU Alumni privacy statement.
- Departments must provide official university logos and banners using proper VCU identity. Units must provide these graphics in a jpg or gif format. DAR Communications consults with University Relations if an identity question arises.
- All DAR emails follow university and Associated Press style guidelines.

## Forms

1. Advancement Services Online Request form (<http://staff.oda.vcu.edu/HelpDesk>)



## Related Documents

1. Advancement Services' Request for Services Policy
2. Correspondence and Solicitation Code policy
3. Disciplinary Policy
4. DAR calendar (<http://staff.oda.vcu.edu/calendar>)
5. DAR intranet (<http://staff.oda.vcu.edu/>)
6. VCU Identity guidelines (<http://www.identity.vcu.edu/>)
7. CAN-SPAM Act: Requirements for Commercial Emailers
8. Direct Marketing Association's Online Marketing Guidelines
9. E-Communications Best Practices [See DAR staff Intranet]

## Revision History

This policy supersedes the following archived policies:

December 2013 *Policy on DAR-related e-communications*

December 2012 *Policy on DAR-related e-communications*

May 2009      9.1.4 *Advancement-related E-mail Policy*

## FAQ

- 1. Can I sent an email based off the constituent list in RADAR?** No. This data does not have exclusions, such as do not email or deceased, applied. A list exported from the constituent list can be provided to DAR Communications for import. DAR Communications will apply exclusions and ensure that constituent records are marked with a communication.