DAR Communications

Policy Type: Local
Responsible Office: Development and Alumni Relations
Initial Policy Approved: 05/25/2010
Current Revision Approved: 06/23/2022

Policy Statement and Purpose

Virginia Commonwealth University is committed to creating a collaborative and successful fundraising environment to develop and enhance programs beyond what is possible with state support and generated revenue. Philanthropic gifts increase access to exceptional education, institutional research and health care.

This policy defines requirements that contribute to the value and quality of Development and Alumni Relations (DAR) communications while maintaining compliance with applicable legal and regulatory requirements. This policy ensures the:

- Integrity and accuracy of data used to contact alumni, donors and prospects as well as the ability to process email opt-out requests in accordance with the federal CAN-SPAM Act.
- Communications with prospects, donors, alumni and other constituencies are recorded in the university’s database of record, allowing for robust segmentation and reporting opportunities.
- Recipients are positively influenced by the quality and frequency of development- and alumni-related messaging.

All official business communications with donors, alumni, prospects and other external constituents must be coordinated with DAR Strategic Marketing and Engagement and executed using DAR systems. All DAR fundraising and alumni relations staff must adhere to the Commonwealth of Virginia’s Use of Internet and Electronic Communications Systems (Policy 1.75). DAR maintains university records by collecting, storing or using personal information for the purpose of conducting DAR activities. Data integrity and accurate university records are required to implement university communications strategies that require personal information, such as bounce backs, information updates and subscription requests. Constituents who provide personal information to VCU through a voluntary contact update, online giving or event registration give implied consent for DAR to send future communications until they explicitly opt out.

Noncompliance with this policy could result in disciplinary action up to and including termination. VCU supports an environment free from retaliation. Retaliation against any employee who brings forth a good faith concern, asks a clarifying question or participates in an investigation is prohibited.
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

Advancement Solutions’ systems
All systems managed by Advancement Solutions, including, but not limited to, RADAR, Development and Alumni Relations intranet, online reporting center, online giving and payments, online event registrations, e-communications and alumni and development websites.

Ask ladder
A fixed or calculated solicitation amount based on a constituent’s giving history.

Buckley hold
Under the provisions of the Family Education Rights and Privacy Act of 1974, also known as the Buckley Amendment, currently enrolled students have the right to withhold disclosure to third parties of their directory information, including contact information, major, dates of attendance, etc.

Communication preferences and record exclusions
Any communication preferences requested by a constituent or a university representative that are applied as solicit codes to all email and mail communications (i.e., do not mail, do not solicit, do not email) as well as inactive and deceased individual record exclusions.

Campus partner
Any entity affiliated with the university or VCU Health System and its hospitals, including, but not limited to, a college, school, department, division, agency, center or foundation.

Constituent
Any individual, corporation or foundation, especially an alumnus/alumna, donor or prospect, with a record in the university’s database of record, RADAR.
**Constituent marketing contact**
The Strategic Marketing and Engagement team member assigned to work with a campus partner to provide strategy, lists, e-communications and reports from DAR systems.

**Constituent marketing request**
A request for any DAR-related business communication, which is submitted via the DAR intranet.

**Custom audience digital advertising**
A marketing tactic that uses constituent data to segment an audience by demographics or interests, allowing an organization to target messages to the right person at the right time.

**DAR-related official business communications**
Communications that are sent to any constituent in RADAR and pertain to any fundraising, donor, prospect, alumni or university-affiliated foundation activities, including, but not limited to, publications, solicitations, event invitations, surveys, emails, custom audience digital advertising and acknowledgements.

**E-solicitations**
Communications, either one-time or recurring, that ask constituents to make a gift. E-solicitations always require either a companion new or existing trackable giving form created through DAR systems.

**Nonengaged email**
An email that hasn’t been opened or been submitted through an online form in the past 12 months.

**One-to-one contact**
Any communication between a university or affiliated-foundation employee and a donor, prospect, alumnus or other constituent that furthers an official university relationship. Examples include inviting an individual donor to coffee and emailing an alumnus about their event registration.

**RADAR (Rams Advancing Development and Alumni Relations)**
The database of record for VCU’s Office of Development and Alumni Relations, currently Blackbaud CRM.

**Recipient list**
The list of constituents to receive a communication.

**ThankView**
An email platform for sending personalized engagement videos.

**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 revisions as required by the policy “Creating and Maintaining Policies and Procedures” through the appropriate governance structures. Please direct policy questions to the Strategic Marketing and Engagement division of DAR.
1. **Exclusions for board members**

Official business communications to board and volunteer committees are not governed by this policy because their members have an existing, active relationship with VCU and a reasonable expectation to receive communications as a result of their volunteer service.

Members of the VCU Board of Visitors and the VCU Health System Authority Board and their life partners can receive general correspondence, such as e-newsletters and magazines, but are excluded from solicitations and communications promoting events, unless permission is granted by the AVP for Strategic Marketing and Engagement in consultation with DAR leadership.

2. **Turnaround times**

All communications are deployed following turnaround times established and defined on the request form. Any major changes or additions to the communication draft or the recipient criteria could result in delay or reschedule of the communication.

3. **Criteria for communications audiences**

Campus partners are permitted to communicate only with constituents who are affiliated with that area. Partners wishing to communicate with constituents who do not have an affiliation with that area must receive approval from the AVP for SME or designee. Additionally, the AVP of SME or designee must approve any communication sent to the entire alumni or donor base.

4. **Data privacy**

Refer to the DAR policy on data governance for guidance on sharing alumni and donor information with volunteers. Employees are responsible for the security and integrity of personal information.

**EMAIL REQUESTS (recipient list and/or send)**

**Guidelines**

VCU DAR sends no more than three emails per day to ensure alumni and donors are not overwhelmed by the frequency and number of communications from the university. In addition, each constituent should receive, at most, one email from VCU per day.

- Review the DAR calendar before choosing an email send date to ensure no more than three emails are scheduled and there is no audience overlap, keeping in mind the turnaround time for emails.
- Rush requests must be approved by the senior director of Constituent Marketing in consultation with DAR leadership. Constituent Marketing reviews requests and approves or adjusts, as necessary, the requested send date.
- When managing the calendar, Constituent Marketing follows this hierarchy:
  - **Priority 1**: Communications sent to the entire alumni and/or donor base have first priority. No additional emails can be sent on a day that the entire alumni and/or donor base
receives an email. Exceptions can be requested by contacting the assistant vice president for Strategic Marketing and Engagement at irvinms@vcu.edu.

- **Priority 2**: E-newsletters. These will rarely, if ever, be moved from the scheduled send date. These should be scheduled well in advance.

- **Priority 3**: Emails. These might be added to the calendar closer to the mail date, but campus partners are encouraged to schedule these well in advance and submit the content closer to the send date.

- **Priority 4**: E-solicitations. These should be scheduled well in advance and have flexibility in mail date if an urgent email needs to be sent on the same day.

**Procedures**

- Submit a Help Desk Ticket for a campus partner constituent marketing request or 111 constituent marketing and communication request. To expedite creation of the request, ensure the form is complete. All content (copy and graphics) is due 10 business days before the send date.

- In the ticket, provide the criteria for your audience so that an accurate list can be generated from RADAR. Requestors can pull a list of recipients using the constituent list in RADAR, but that data must not be used as the final mailing list because the initial list might contain individuals who have opted out of receiving our communications. If the requestor is using a list of recipients pulled from the constituent list, a constituent marketing request must be submitted, with an Excel list of RADAR IDs, adhering to the established turnaround times. The constituent marketing team member applies exclusions to the list of RADAR IDS provided.

- DAR staff can send mass email to only constituents with RADAR records. If a new record needs to be created for a constituent to be added to mass communications, complete a Data Integrity - Constituent Record Updates > Create a new record.

- Recipient lists do not include constituents whose email is marked as “nonengaged.” If a campus partner wants to include unengaged constituents in the email communication, they must receive approval from AVP of Strategic Marketing Engagement or their designee. While constituents whose emails are marked as “unengaged” do not receive email campaigns (with the exception of monthly alumni enews), they can still receive communications through other marketing channels (including direct mail, social media, phone, websites, etc.). In addition, campus partners can email individuals with a Buckley hold on their record, either as a one-to-one contact or a mass email, as long as it is from a @vcu.edu email and the recipient isn’t specifically disclosed as being a student or former student.

- A maximum of two emails can be sent to promote an event. An optional third email can be sent for post-event follow-up. Digest emails are encouraged.

- Turnaround times must be adhered to when scheduling emails. Turnaround times begin when all information and content is received by Constituent Marketing. If all information and content is not received in sufficient time to meet the turnaround guidelines, the email might be rescheduled.

- When a ticket is submitted, the email is automatically entered on the DAR calendar for planning purposes. Requestors should not create a separate calendar entry. The Constituent Marketing team reviews email requests weekly. Any necessary adjustments are coordinated with the requestor.

- Strategic Marketing and Engagement reviews and copy edits email content and facilitates the approval process before the email is deployed. All email copy must have previously been approved by the necessary parties (i.e., volunteers, deans, etc.) in the requestor’s area before submitted in the ticket, and changes at the proof stage should be minimal. Extensive changes to the email
content or recipient list at this stage could result in the email being rescheduled. Emails must be approved by noon the day before the scheduled send date. If approval is not received from the requestor, the email might be rescheduled.

- All emails are scheduled using a send-time optimization tool. Different send times are available on request.
- After the email is sent, a report of the message performance (from the platform) is sent to the email requestor.

**Opt-out standards**

- All e-communications must include an option to unsubscribe from future e-communications.
- Constituents can unsubscribe to stop e-communications. If they unsubscribe from a single email, they are unsubscribed from all university emails.

**University standards**

- All e-communications must include a link to the university or the VCU Office of Alumni Relations privacy statement.
- Campus partners must provide official university logos and banners using proper VCU identity in a jpg or gif format. Constituent Marketing consults with University Relations if an identity question arises.
- All communications follow university guidelines, which call for adherence to Associated Press style guidelines.
- All communications must meet [ADA guidelines](#).
- To be in compliance with VCU's equal employment opportunity/affirmative action policy, all direct mailings must include the following statement: VCU is an equal opportunity/affirmative action institution.
- All invitations, flyers, posters, etc., announcing events should include a special accommodations contact phone number, email or both.
- Registration forms for events should include a “Space is limited” or “Registration is limited” line to manage constituent expectations in the scenario the event sells out.
- Giving and registration forms must contain the following language: “Thank you for providing your contact information for VCU to communicate with you in the future.”

**PRINT MAIL REQUESTS**

**Procedures**

- Submit a Help Desk Ticket for a campus partner constituent marketing request or 111 constituent marketing and communication request, keeping in mind the turnaround times for mailing lists. Rush requests must be approved by the senior director for Constituent Marketing or designee in consultation with DAR leadership. When a ticket is submitted, the direct mailing is automatically entered on the DAR calendar for planning purposes. Requestors do not need to create a separate calendar entry.
- If a list is pulled from the constituent list in RADAR, the list **cannot** be used as your final mailing list because the initial list might contain individuals who have opted out of receiving our communications. If the requestor is using a list of recipients pulled from the constituent list, a constituent marketing request must be submitted, with an Excel list of RADAR IDs, adhering to the
established turnaround times. The constituent marketing team member applies exclusions to the list of RADAR IDS provided.

- Before a solicitation mailing list is provided to a campus partner, the Strategic Marketing and Engagement and Gifts and Records Management must review a proof of the solicitation, including content, images and return mechanism, to ensure proper use and placement of branding, identity, messaging, grammar and source codes or finder numbers in accordance with AQ2 remittance design guidelines. Failure to do so could result in a delay in processing gifts and/or cause gifts not to be attributed to your mailing.

- Communication preferences and record exclusions (e.g. do not mail) are applied to all mail lists.

- It is the requestor’s responsibility to review and approve the mail list and to let the Constituent Marketing contact know when it can be activated so the communication can be applied to recipients’ RADAR records.

- If the requestor does not respond by the mail date of the communication, it will be activated and records will be marked.

THANKVIEW
ThankView is an email and texting platform designed to send customized stewardship/engagement videos. ThankView is not intended to be used as a solicitation or event promotion channel and as of Sep. 1, 2022, ThankView is not used by DAR for mass communications. Emails with video content intended for large constituent groups should follow the procedures outlined above.

Questions about ThankView and its use as a one-to-one or one-to-few engagement tool should be directed to the Donor Engagement team. After sending a ThankView message, the user must note the communication as an interaction on the constituent’s RADAR record.

DIGITAL ADVERTISING
Constituent Marketing generates custom audience lists using RADAR data for digital advertising campaigns conducted by requestors who work in the 111 N. Fourth St. building. A Help Desk ticket must be submitted for this request and follows standard turnaround times.

TEXTING
Constituent Marketing generates custom audience lists using RADAR data for text messaging campaigns conducted by partners who work in the 111 N. Fourth St. building.

- The program owner must meet with Strategic Marketing and Engagement to discuss use of the texting platform.

- SME determines whether the channel is used and the appropriate recipient list is.

- DAR Communications crafts the message and sets message timing.

- A Help Desk ticket must be submitted to the Constituent Marketing team by the SME project coordinator.

- The Constituent Marketing team builds the effort/list in RADAR and the message in the texting platform.

- The Constituent Marketing team grants the program owner user access to the texting platform and provides training.

- The Constituent Marketing team sends the message.

- The program owner responds to incoming messages in the platform.
• The program owner marks wrong numbers, etc., as “invalid” in the platform.
• The Constituent Marketing team completes post-text management, including exporting opt-outs and invalid numbers to submit to Gifts and Records Management for updating in RADAR.

Communications tickets can be submitted by DAR personnel with access to the DAR intranet on support.vcu.edu or through the Help Desk.

Related Documents

1. Development and Alumni Relations’ Activities
2. Employee Ethics, Conduct, and Practices Related to University Advancement and Development
3. Data and Information Governance
4. DAR data access
5. Use of Electronic Communications and Social Media
6. VCU Identity guidelines
7. CAN-SPAM Rule
8. CAN-SPAM Act: A Compliance Guide for Business

FAQ

1. Can I send communications using data pulled from the constituent list in RADAR?
   No. This data does not have communication preferences and record exclusions, such as do not email/mail or deceased, applied. A list exported from the constituent list can be provided to Constituent Marketing for import. Constituent Marketing applies communication preferences and record exclusions to ensure that constituent records are marked with a communication and preferences are respected.
5. I do not engage in development and alumni activities as a part of my job responsibilities. How do I get in contact with my area's development and alumni relations representative to execute official business communications with donors, alumni and prospects? Visit the Development and Alumni Relations staff directory to find the appropriate representative from your area. If you need assistance finding the appropriate representative, contact your assigned Constituent Marketing contact.

6. My area has constituent contact information that is not in DAR's database of record [RADAR]. Can this information be submitted so that constituent records accurately receive official business communications? Yes. Submit a Help Desk request ticket for a constituent record update and note any specific communication preferences. Otherwise, the constituent will receive all communications from your area as well as all-alumni/donor communications.

7. Can I use data from another database to email my area's constituents? No. RADAR is the university’s official alumni and donor database of record. All official business communications with donors, alumni, prospects and other constituents must be executed using the data in RADAR.

8. How does Constituent Marketing receive consent to send constituents communications? Constituents who provide their email address to VCU by either updating their contact information or providing the email when making a gift or registering for an event provide implied consent for the university to send them communications until they explicitly opt out. Giving and registration forms all contain the following language: “Thank you for providing your contact information for VCU to communicate with you in the future.”

9. Can I use Ovrture, Igniter, Google mail merge or other marketing and communications vehicles to contact constituents on my own? You can use these tools to send one-to-one contact messages where a standard opt-out vehicle is not required. To comply with the CAN-SPAM Act, however, all other communications must be processed through DAR marketing and communications systems to ensure that each communication includes an opt-out mechanism and preferences are respected.

10. Some of my constituents have opted out from receiving email from VCU. Can I email them directly? If you have an existing relationship with a constituent (for example, that person is in your portfolio or you met them at an event and they handed you their business card and expressed interest in continuing communications), then you can send a one-to-one email to that person to further your relationship. You can also ask, one time, if they are interested in opting back in to receive communications. If so, you should submit a biographical update ticket to GRM to update that preference. Navigating the CAN-SPAM Act can be tricky. Please email the AVP for Strategic Marketing and Engagement for any clarifications.
11. Some of my constituents have opted out from receiving email from VCU, but I want them to know about an event my area is hosting. Can I invite them personally via email or via social media, such as LinkedIn?
If you have an existing relationship with this person and you’ve had a conversation about their interest in the topic of the event, then yes, you can send them a one-time personal invite to the event. You cannot, however, simply forward a mass mail invitation or repeatedly contact them after they have indicated a desire to opt out. You must include personal language indicating your knowledge of their interest. Consider including words such as “special,” “customized” or “individualized” or referring to the last time you saw each other and why you think they might be interested in the reason you are now contacting them again. If you don’t have this specific knowledge, consider sending the constituent a paper invitation or calling them. Navigating the CAN-SPAM Act can be tricky. Please email the AVP for Strategic Marketing and Engagement for any clarifications.

12. My school/program needs to send a survey to our alumni to gather information for our accreditation/reaccreditation. Do I need to send the email through Strategic Marketing and Engagement?
Because of the specific intent of accreditation, you are not required to execute the survey through SME. Submit a Help Desk Ticket for a campus partner constituent marketing request to request a list of alumni for your survey, and the records will be marked accordingly.

13. I want our faculty and staff to know what our college or school is doing. Can I email them?
If you want to share general events and news about your school or college with faculty and staff, then you can communicate with them through your unit’s internal channels. You only need to use DAR channels when you are directly soliciting faculty and staff. As a general rule, faculty and staff are not included in general information mass emails (i.e., newsletters). It is OK, however, if faculty and staff fall into your criteria, for example, they are alumni and you are sending an email about an opportunity to attend an alumni event. If you would like to request an exception to include faculty and staff in your communication, please email the AVP for Strategic Marketing and Engagement.