



Advancement

Email Communications Policy

Policy approved on 7.29.20 by the Online Management Subcommittee

Edits and Additions made on 5.10.23

Purpose:

The purpose of this policy is to encourage partnership with UCF Advancement and the university's units, as well as ensure data integrity and email best practices.

Applicability:

Applicable to anyone requesting UCF Advancement data.

Requesting and Sending an Email:

Step 1: Review the UCF Advancement email calendar to select send date(s) that are available. The calendar is available here: [bit.ly/UCFEmailCalendar](https://ucfalumni.com/workorders).

Step 2: Submit a work order to UCF Advancement - <https://ucfalumni.com/workorders>. **Work orders must be submitted two weeks in advance of the email send date.**

- **Why do I have to submit a work order?** Work orders allow the communications team to review the request and follow up for additional information if needed. The form also enables the team to reserve dates on the calendar and task out your request to the appropriate team members.
- **What if I submit less than two weeks out?** The communications team has the right to refuse turning around your project in the condensed time span. **Failure to submit your work order in the appropriate time frame puts your project at risk of being delayed.**

Step 3: College/unit/department designee creates email in their appropriate sub-account in UCF Advancement's Emma platform: <https://myemma.com/>.

- Once email is created, it is your responsibility to have the email reviewed and approved through your leadership team. Following approval, click "Schedule and Submit" in the Emma platform to notify the communications team that your email is clear to send.
- **PLEASE NOTE: step 3 must be completed in its entirety at least 24 - 48 hours in advance of your intended scheduled send time. Additionally, please keep in mind that email**

campaign approvals received by the Communications team outside of normal business days/hours may not be seen or approved until the following business day.

Step 4: The UCF Advancement communications team will send the email on your behalf.

Email Lists and Data Requests:

- All email requests submitted through the above actions will exclude those who have opted out or have solicitation codes that legally prevent us from communicating.
- Alumni and donor data cannot be requested for use outside of **Advancement's** email system. Colleges and units that wish to email their respective constituencies are encouraged to do so, but the **emails must be sent via UCF Advancement's system, not external services such as MailChimp, Constant Contact or an Emma account run by a separate UCF department** . By using the centralized system, individuals who have chosen to opt-out of receiving emails will not pull into distribution lists, as required by law. Units that use external email platforms run the risk of including these individuals.
 - **Exception:** UCF Advancement employees may request lists for individual correspondence with constituents via your UCF Outlook account. However, any commercial, promotional and/or marketing emails should be sent through Advancement's system.
- We have "basic" alumni email lists available at any time and are working on basic donor lists. A basic email list is one that can be segmented by city, state, academic college, degree or any combination of these fields. If other email lists are required (such as donor or special interest lists), you must submit an Advancement ITS Foundation Data Request that outlines your specific needs through the Support Center at <https://ucf.service-now.com/>. **Please be aware that Advancement ITS requires a minimum of 10 business days to turn around requests.**

Standards for Email Procedure:

- If you are in a college or unit, your email requests must be submitted through your Alumni Engagement officer who will be responsible for submitting work orders, building the email in Emma and managing your distribution lists.
- If your college or unit does not have an alumni engagement officer, your Advancement administrative assistant will be your contact to do the work listed above.
- Each college or unit is permitted two users on the Emma platform, in addition to their Advancement administrative assistant.
- Requests to promote fundraisers conducted outside of the UCF Foundation, third-party surveys, or related money-raising/data violations will be denied.

Best Practices:

- The email calendar is packed with communications. Consider combining your messages when possible to avoid hitting the same audiences within the same week.
- Keep your messages short and to the point. Provide a clear call-to-action in your email.
- Use colorful, eye-catching images to help tell your story.
- Consider clever, quippy subject lines for optimal open rates.
- Plan! From experience, we can tell you that rushing a project results in mistakes, broken links, typos and dismal email scores. If you want a project to succeed, work with the communications team in advance to ensure a quality product.