Guidelines [1]

- Best Practices
- Branding
- Campus Communications
- CAN-SPAM
- Payment Card Industry (PCI)
- Fundraising

Consider the best practices below when developing your email communication strategy. For additional resources, visit the eComm Wiki [2] or contact your eComm Specialist [3].

Selecting your Audience

[infobox title="Selecting your Audience"]Emails should be sent to the smallest group of individuals possible while still reaching the intended audience. Work with your eComm Specialist [3] to build reports that segment your audience and maximize the effectiveness of your communications.

Examples of strategic audience segmentation include:

- If your email pertains to faculty or staff in a particular school or college, send your email only to those faculty and staff, not to all faculty and staff.
- If your email pertains to all students in a particular major or class year, send your email only to those students, not to all students.
- If your email pertains to alumni who graduated in a specific year from a specific program, send your email only to those alumni, not to all alumni.

Choosing your Subject and From Information

Choosing a Subject Line
Your email design starts with what people see right away: the subject line. Your email subject should be something that grabs your constituents’ attention and gets them interested enough to keep reading.

From “The Email Design Best Practices You Need to Know [4]”

Make your subject line informative so that it offers something of value, but not so long that it gives away too much or reduces your readers’ interest. The ideal email subject should be a good, interesting summary that tells people what they can expect from reading your email in
the fewest possible characters.

Remember, your email subject isn’t the only thing a constituent sees when they see your email in their inbox. The other elements likely to show up are your name (or the sender’s name) and a snippet of the beginning of your email. Those elements are also important when it comes to getting constituents to actually read your emails.

You may choose to keep your “From” name the same throughout all of your emails for consistency, or consider using that opportunity to get even more specific about what constituents can expect from your email.

Keep in mind that the sender’s name field should always include your brand name or something recognizable so subscribers know exactly who sent the email, and that it’s from a sender they trust and subscribe to. Then, the first line of your email can be another opportunity to pique subscribers’ interest about what your email has to offer.

**Creating your Content**

[infobox title="Creating your Content"]Strive to create content that is meaningful and relevant for your readers. You can use functionality such as A/B testing and dynamic content to experiment with your messages to ensure they are truly engaging your audience. Contact your eComm Specialist [3] for more information.

Some best practices for creating your content include the following:

- Keep your message short and to-the-point. Readers are more likely to engage with content at the beginning/top of your message, so limit the need to scroll when possible.
- Limit the number of links in your message to only the ones that are most relevant to your content. No more than 5-10 links per email will generally increase your click rate.
- Ensure the timeliness of your content. Relevant and recent information is more useful than outdated content. If the news happened before your previous e-communication, it’s outdated.
- Make sure that your email compels recipients to take a specific action, such as donate to the university, enroll in a class, register for an event, engage on social media, etc.
- Design an email that is appealing to your audience, that looks professional, and that meets CU brand standards. For examples of well-designed emails visit our Wiki post "Really Good Emails [5]."

**Photos and Graphics**

**Working with Images**
Photos give you the opportunity to brand your emails, make them more visually interesting, and get constituents interested in your offerings. Regardless of what you want your photos to accomplish, you need to make sure they display properly in emails.

*From ‘The Email Design Best Practices You Need to Know [4]’*

Photos and graphics should have excellent resolution no matter their size and high quality enough to get a point across — but not so large that they slow down your email’s load time. You should also consider whether or not they actually add something essential to your emails.
If you’re just using them to take up space, you may be slowing down the loading process and wasting valuable real estate. You can see more specifications about header and email image recommendations here [6].

**Scheduling your Message**

[infobox title="Scheduling your Message"]Schedule your message based on email send reports that indicate when your audience is most likely to engage with the content. Work with your eComm Specialist [3] to access your email send data and make decisions about future sends accordingly.

Examples of strategic email scheduling include:

- Consider the time that might work best for your audience. For example, faculty and staff are most likely to engage with your email during business hours.
- For smaller email sends, the best time to send a message is between 10:00 a.m. - 12:00 p.m. and from 2:00 p.m. - 4:00 p.m.
- Determine how frequently you would like to have email campaigns. Don't send too many, but make sure you're sending them often enough. Sending too often may result in unsubscribes. Use your email send data to guide this decision. Your eComm Specialist can assist you in getting the information you need to guide your future efforts.

**Tracking Your Success**

**Tracking Your Success**

Like anything else in higher education, finding the best email design for your school, college, or program is an ongoing process. You’ll likely need to make adjustments over time to keep your constituents happy and interested.

*From “The Email Design Best Practices You Need to Know [4]“*

Analytics data can provide insights about the effectiveness of your email designs. If you find engagement is consistently higher on emails that use just one or two photos, or if you see the highest open rates when you use a certain format for subject lines, take those metrics as signs you’re doing something right. Make sure you constantly review your results to find the email design best practices that work for your brand.

Make sure your communication is in compliance with CU's brand standards by using the link associated with your campus/unit below:

- Advancement [7]
- Anschutz [8]
- Boulder [9]
- Colorado Springs [10]
- Denver [8]
- System [7]

**Contact the University Brand Identity Standards Board**
The University Brand Identity Standards Board comprises representatives with professional expertise in branding, marketing and communications from each campus, system administration and the CU Foundation. Not sure if your images adhere to branding standards? Contact your board member to find out.

Before you send an email, consider if there are other avenues on your campus or within the system that you can use to disseminate your message. Doing so helps prevent email fatigue among our constituents. A list of campus and CU communications is provided below.

**CU System**

[embed_content nid=78492 (class="additional class")/]

**CU Advancement**

[embed_content nid=78502 (class="additional class")/]

**CU Boulder**

[embed_content nid=78497 (class="additional class")/]

**CU Colorado Springs**

[embed_content nid=78498 (class="additional class")/]

**CU Denver**

[embed_content nid=78499 (class="additional class")/]

**CU Anschutz Medical Campus**

[embed_content nid=78500 (class="additional class")/]

Campus specific branding standards should also be enforced in your communications.

By using the CU eComm system for communicating with CU constituents, communicators are automatically in compliance with the federal CAN-SPAM Act of 2003. Violators of this federal law can incur steep fines. If you’re a CU communicator and not using the eComm system, you are likely a violator.

Why? Because if you send an email via a tool like Constant Contact or MailChimp and someone opts out of receiving emails from CU, but then receives an email from CU via another source (like eComm, which doesn't share data with those other tools), that is a violation. The eComm system is the master source for maintaining email preferences and where CU constituents (via CU's our online communities) manage their preferences.
The CAN-SPAM Act

Congress signed the “Controlling the Assault of Non-Solicited Pornography and Marketing Act of 2003” (“CAN-SPAM”) into law in January 2004. The purpose of CAN-SPAM is to provide relief from unwanted spam e-mail messages. The law covers both unsolicited e-mails, as well as electronic communications where the recipient has initiated the exchange. Non-compliance with CAN-SPAM constitutes “unfair or deceptive acts or practices” that may result in both criminal and civil penalties.

Below are a few highlights of the bill that all CU communicators should be aware of:

- Q & A
- Examples
- Fines
- Consent
- Information to Include
- Solution
- More info

Does CAN-SPAM apply to University of Colorado e-mail?

Yes. There is no general exception to CAN-SPAM for nonprofits or institutions of higher education. However, CAN-SPAM only applies to e-mails that are “commercial” in nature.

What are Commercial E-mails?

A commercial e-mail is “any electronic mail message the primary purpose of which is the commercial advertisement or promotion of a commercial product or service (including content on an internet website operated for a commercial purpose.)” This would include e-mails that promote for profit or revenue generating activities.

Examples:

- Tickets for a play, movie, or event where there is a charge for admittance. It does not matter whether the event is on or off campus.
- E-mails sent to prospective students. This applies even if the prospective student initiates the e-mail communication.
- An emailing offering to sell computers, cars, furniture, etc. This applies whether you are offering the item through your capacity as a University employee or using your e-mail account for personal use.
- E-mails sent by an external organization on behalf of the University. For example, a marketing or publishing company that sends e-mails that contains promotions for a commercial product or service such as an athletic event, play, or exhibit.
- An e-mail that has a web link to a University site that promotes a product or service.

How do I know whether the primary purpose of the e-mail is commercial?
CAN-SPAM only covers e-mails whose primary purpose is commercial. If an e-mail contains only commercial content, then the primary purpose would be commercial. However, if an e-mail contains both commercial content and non-commercial material (i.e. transactional or relationship content) the primary purpose is commercial if:

- The subject line of the e-mail message would lead a recipient to conclude that the message advertises or promotes a product or service; or
- The body of the e-mail does not set forth the message’s transactional or relationship content at the beginning of the message; and
- A recipient’s reasonable interpretation of the body of the e-mail would lead the recipient to conclude that the primary purpose of the messages is to advertise or promote a product or service.

Factors for evaluating the body of the e-mail include:

- The placement of the commercial content in the body of the e-mail
- The proportion of the message that is dedicated to the commercial content
- The color, graphics, type size, and style the e-mail used to highlight the commercial content

What are the Legal Requirements for Commercial E-mails?

CAN-SPAM requires commercial e-mails have the following characteristics:

**Opt-Out link**
- The body of the e-mail must provide recipients with a clear and conspicuous opportunity to decline (“opt-out”) receiving future messages.
- The University must honor the opt-out or unsubscribe requests within 10 business days of receiving the request.

**Valid Return Address**
- The e-mail must contain a valid return e-mail address or Internet-based reply mechanism to comply with the opt-out option. This must work for 30-days past the send date of the message.

**Valid E-mail Information**
- The header and subject line must be accurate.
- The subject line must accurately reflect the content of the e-mail.
- The “from” line must be accurate. You cannot use anonymous, fictitious, or misleading addresses.

What types of electronic communications are not subject to CAN-SPAM?

CAN-SPAM does not apply to e-mail that is directly related to an employment or transactional relationship or is non-commercial. A transactional message must contain a proper routing or tracking number.

**Examples:**

- Human resources sending e-mail directly related to benefit plans in which the recipient is currently involved, participating, or enrolled. An e-mail describing changes in benefits
would be exempt, while an e-mail describing discounts for products or services would require the characteristics described above.

- Financial Aid sending e-mail related to loans and grants for which the student is either currently receiving or has applied for consideration.
- Post-registration event communications (Registration confirmation, Event Reminder, Post-Event Message/Survey)
- An electronic message that details charges owed to the University.
- Announcements of free events or services. If any money is collected, whether or not it is clearly indicated in the e-mail, the law applies and would require the characteristics described above. Additional campus policies provide guidelines regarding the appropriate use of communication channels for events and services.
- An electronic newsletter sent by an external organization on behalf of the University that does not contain any solicitation or advertisement of product or services.
- While e-mail that is clearly not commercial in nature is exempt from the disclaimer, it may be prudent to offer individuals an opportunity to opt-out from your list. This would not be applicable to e-mails that involve a transactional relationship.

CAN-SPAM does not apply to e-mail that is directly related to an employment or transactional relationship or is non-commercial. A transactional message must contain a proper routing or tracking number.

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- An electronic newsletter sent by an external organization on behalf of the University that does not contain any solicitation or advertisement of product or services.
- While e-mail that is clearly not commercial in nature is exempt from the disclaimer, it may be prudent to offer individuals an opportunity to opt-out from your list. This would not be applicable to e-mails that involve a transactional relationship.

Violations are costly.

CAN-SPAM defines certain fines from $25 up to $2,000,000. According to the Federal Trade Commission, each separate e-mail in violation of CAN-SPAM is subject to penalties of up to $16,000.

CU constituents are automatically opted-in because of their relationship with CU.

We opt constituents in to receiving emails from CU based on their affiliations, either as an
alumnus, donor, employee, etc. or at the recipient’s own initiative (by signing up to receive CU communications via CU’s online communities[13]). For example, alumni from the CU-Boulder School of Arts & Sciences will not receive emails from UCCS (except in cases where there’s a previous relationship).

CAN-SPAM requires commercial e-mails have the following characteristics:

**Opt-Out link**
- The body of the e-mail must provide recipients with a clear and conspicuous opportunity to decline (“opt-out”) receiving future messages.
- The University must honor the opt-out or unsubscribe requests within 10 business days of receiving the request.

**Valid Return Address**
- The e-mail must contain a valid return e-mail address or Internet-based reply mechanism to comply with the opt-out option. This must work for 30-days past the send date of the message.

**Valid E-mail Information**
- The header and subject line must be accurate.
- The subject line must accurately reflect the content of the e-mail.
- The “from” line must be accurate. You cannot use anonymous, fictitious, or misleading addresses.

Send your emails through eComm, which globally, accurately and automatically tracks un/subscription preferences.

**Request access today**[14]

Learn more about the CAN-SPAM Act of 2003


The University of Colorado has guidelines for data security compliance that are aimed at protecting not only our constituents, but also university units. As part of our use of Cvent, the Office of Information Security[17] and Treasury[18] has advised us on those guidelines[19] for data security compliance. The merchant accounts that are currently available in Cvent will undergo an audit in August with our partner bank, Wells Fargo Merchant Services (WFMS) to ensure we meet the current Payment Card Industry Data Security Standard (PCI-DSS)[20].

**Help CU stay compliant**

If you create event registration forms in Cvent that require credit card transactions, you must meet CU data security standards to ensure that we can continue to use secure merchant accounts in Cvent.
What is PCI?

The Payment Card Industry Data Security Standard (PCI DSS) is a set of security standards designed to ensure that ALL companies that accept, process, store or transmit credit card information maintain a secure environment.

PCI FAQs [21]

If you create event registration forms in Cvent that require credit card transactions, the following activities are NOT PCI compliant and could result in steep fines or worse, inability to use a merchant account with our partner bank, Wells Fargo Merchant Services (WFMS).

DISCONTINUE

Discontinue accepting credit card information over the phone, via mail and in-person (eg: at an event) and entering it into a Cvent form on/via a CU-owned device (computer, laptop, phone, etc.)

We understand that this may present challenges in the way you meet your business needs. We are offering the following alternatives.

1) TAKE CASH OR CHECK

For those attendees who cannot register for an event using a personal device and who would have previously provided credit card information over the phone or via mail, encourage them to mail a check or bring cash (check with your unit finance representative about cash) or check to the event.

IS THERE A COST?

There is no cost to your unit with this option.

2) PURCHASE (OR RENT) A CREDIT CARD TERMINAL
Obtain an individual merchant account that is owned by your unit AND purchase (or rent) a terminal ("swiper"). You will be able to accept call-in, mail-in and in-person credit card information using this terminal that is associated with your unit-owned merchant account.

[infobox title="IS THERE A COST?"]

Merchant accounts are FREE if associated with a terminal ("swiper"). You must have a merchant account AND a swiper to be compliant.

You have a few options for a credit card "swiper" terminal:

<table>
<thead>
<tr>
<th>PURCHASE</th>
<th>RENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wireless terminal</td>
<td>Wireless terminal</td>
</tr>
<tr>
<td>Must be associated with a phone service (AT&amp;T or Sprint, etc.) so additional cellular costs apply</td>
<td>Must reserve at least a week in advance</td>
</tr>
<tr>
<td>Becomes property of your unit</td>
<td>$45 rental fee + $15 cell service fee = $60 total</td>
</tr>
<tr>
<td>Your unit owns it forever</td>
<td>$600 one-time cost</td>
</tr>
</tbody>
</table>

Other considerations:

- You must have a merchant account AND a swiper to be compliant.
- Your merchant account can be associated with your desired speedtype.
- Your unit's finance representative can access the account for processing, refunding and other purposes for any transaction made via the swiper.
- To obtain a new merchant account, the process takes about 2 weeks
- A new credit card swiper will arrive within a week after purchase
- In addition to using the swiper for call-in, mail-in and in-person transactions, we recommend you also process "OFFLINE" registrations via your Cvent form. This allows you to capture all registrations activity for future analysis, reporting and reconciliation purposes.
- All merchant account holders must work with their campus security teams on their annual compliance assessment.

?

3) USE A TERMINAL AND SET UP A CVENT IMA

In addition to obtaining a merchant account and purchasing a swiper (see 2nd alternative above), you can also purchase a separate Internet Merchant Account (IMA) and set it up within Cvent.
• This option allows you to accept call-in, mail-in and walk-up transactions using the terminal (2nd option).
• The Cvent IMA allows for a smoother money process as all transactions will go straight to your IMA, instead of via the CU-shared IMA where the money eventually ends up in your speedtype via reconciliation and journal entries made by Treasury and Controller offices.
• The separate merchant account is specific to online transactions (e.g., for Cvent). This is required by Wells Fargo Merchant Services (WFMS). If you go with this option, you will have TWO merchant accounts: one for the terminal/swiper and the other for online transactions (via Cvent).
• All merchant account holders must work with their campus security teams on their annual compliance assessment.

[infobox title="IS THERE A COST?"]

• The online gateway (IMA) with Wells Fargo Merchant Services (WFMS) is $200 one-time set-up and then $20 monthly ($240 annual). The process takes about 2 weeks. This step must be complete before setting up the Cvent Internet Merchant Account (IMA).
• The cost with Cvent is $970 set-up and then $750 each year after that. This process takes 5-7 days.

4) SET UP DEDICATED COMPUTERS

NOTE: You must work with your campus information security team to determine if this is an option.

If you set up dedicated computer(s) within your unit that are ONLY used for processing credit card transactions (e.g., via Cvent forms) and that are approved by your campus security team:

• you need to purchase a separate merchant account (see option 3 above)
• you do not need to purchase a terminal (“swiper”).

[infobox title="IS THERE A COST?"]

Yes. There is a cost - see option 3. You would be doing option 3 + option 4 in this scenario.

CONTACT US

Contact Jennifer, Lexie or Brad if you have questions or just want to talk through the options. We're here to help.
Q: What is a Merchant Account?
A: A bank account that enables the holder to accept credit cards for payment.

Q: Why can’t we enter credit card information into a Cvent form on a CU device?
A: The non-compliant component is that the credit card information is transmitted on a CU-owned device.

Check out the "Compliant Alternatives and Costs" tab for details on other options.

Q: Can I use the Cvent mobile app and Cvent swiper?
A: The Cvent mobile app and swiper solution is currently under review by our data security team. As it stands now, it is NOT approved to accept credit card transactions. However, your unit can use it for any purposes other than credit card transactions. We will alert CU eComm Cvent users when we know more. Learn more about Cvent's mobile app, OnArrival [26].

Q: How much does it cost to get a new merchant account?
A: It depends on which option works best for your unit. See the "Compliant Alternatives and Costs" tab for more information.

Q: If I obtain a merchant account for my unit, can I have all of my Cvent forms associated with that?
A: No. You would have to set up a separate merchant account that is specific to online transactions. The cost for a merchant account online gateway is $200 and $20 per month after that. There is an annual cost with Cvent of $750 for an integrated merchant account. One-time cost is $970. Annual cost is $750. See the "Compliant Alternatives and Costs" tab for more information.

Q: Can a “walk-up” attendee use their own phone to register and pay using their credit card?
A: Yes. As long as the transaction takes place on a NON-CU device, you are compliant.
Q: How do I ensure Cvent reflects the registration if we are using a swiper to accept credit card transactions for call-in, mail-in or in-person transactions?

A: Register as normal using Cvent, but mark the registration as “Offline.” Visit our How-Tos page for help on how to do this. You will do this IN ADDITION to using the credit card swiper.

Q: Is there a university policy that addresses PCI compliance?

A: Yes. Visit /ope/aps/4056[19].

Q: What if my event is a University fundraising event and I am using the CU Foundation merchant account (“CUF Cvent“)? Does this apply?

A: You do not need to obtain a merchant account or purchase a swiper for a fundraising event that has been approved to use the CUF merchant account. The CU Foundation can accept credit card and mail-in credit card information as they have a PCI compliant computer that is dedicated to this activity. Contact Matt Roush[27] for more information.

Q: If I am conducting a fundraising event and using the CUF merchant account for registration payments, can I also use this same account for other event activities such as auctions or merchandise sales?

A: No, auction and/or merchandise sales will require the rental or purchase of a wireless terminal through the Treasurer’s Office. Revenues from these types of activities should be deposited to the University and to your event Speedtype.

Have more questions?

Send them to contact@cu.edu[28] and we'll post the answers here.

If you are a CU Cvent user, confirm that you are PCI compliant in your use of the CU Cvent "CU Events" merchant account.

- Complete this form even if you host free events.
- Complete this form even if you are not an authoritative event form "approver" in your unit.
- Failure to complete this form may result in Cvent access discontinuation.
The CU Advancement office is an independent, nonprofit foundation whose sole mission is to support the people, places and programs of the University of Colorado’s four campuses. Having an independent, nonprofit foundation results in greater fundraising efficiencies and benefits for the University by assuring proper stewardship of private gifts, managing assets strategically, engaging volunteers as informed advocates, and ensuring confidentiality of donor records.

The State of Colorado provides less than 6 percent of the University’s operating budget, down from 25 percent in 1990, so private support is more important than ever.

How are gifts spent?

Each gift received by CU Advancement, regardless of purpose or amount, is carefully processed to ensure that the donor’s wishes are honored and that the University receives the maximum benefit.

Can donors choose where their gifts go?

Yes, 98% of gifts are allocated to a specific purpose. Gifts are not spent outside their allocation. For example, if a donor makes a gift to the Cancer Center, every cent of that gift is given to the Cancer Center. That gift cannot be moved to a different campus, program, or initiative.

Who does the CU Advancement office solicit?

CU Advancement development officers solicit individuals, corporations, and foundations that they believe to have affinity and giving potential. These development officers are focused on
higher-level gifts. The Annual Giving program is focused on gifts of all sizes, small or large, and is executed via a call center, mailings, and occasional broadcast emails. The Annual Giving program reaches out to alumni, donors, and parents of CU students. “Friends” (individuals who are not alumni, parents, or donors) are not solicited by the Annual Giving program.

However, if a friend of the university attends selected university events, or is otherwise approached for a gift on an individual basis, they may be contacted directly by a CU Advancement development officer.

**Are interns, residents, and fellows included in Annual Fund solicitations?**

No.

**Are Residents, interns and fellows of the Anschutz Medical Campus solicited?**

Residents, interns and fellows may be solicited on an individual basis depending on their past giving history.

**Do constituents have the option to opt out of communications from CU Advancement?**

Yes. On every email there is an unsubscribe link, which gives constituents the option to opt out of all emails from the University, or opt out of communications specifically from the CU Advancement office, while continuing to receive the communications they choose.

**If I submit my school, department, or unit’s list of email addresses to CU Advancement, will those people be solicited?**

Depending on the individuals on your list, it is possible. As is the practice at all major universities, we rely on alumni for gifts toward CU’s people, places, and programs, and we may reach out to them to encourage them to make gifts to CU. If you submit an updated address for an alumnus, that individual may receive communications if they haven’t already opted out of communications.

**Groups audience:** eComm

Source URL: https://www.cu.edu/ecomm/guidelines

Links