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Policies [1]

The CU eComm program [2] allows CU employees to communicate electronically with internal and external CU audiences. This page outlines policies and guidelines for communicating with both audience types. All CU eComm administrators must review and agree to the eComm policies and guidelines before they are granted access to the eComm system. To request access, go here [3].

- External
- Internal

POLICIES FOR ECOMM ADMINISTRATORS/UNIVERSITY OF COLORADO EMPLOYEES FOR COMMUNICATING WITH EXTERNAL AUDIENCES (ALUMNI, DONORS, PARENTS AND FRIENDS)

Last updated on 3/24/11

BACKGROUND The University of Colorado's single-vendor system for advanced electronic communications to internal audiences and external constituents works to achieve several objectives. Certain policies are required to achieve the objectives of the Harris Connect program. Recommendations are offered that are intended to guide each campus in developing a campus-centric program.

Online community: An Online Community is a social and professional community that is designed for University of Colorado constituents only. An Online Community is password protected and requires authentication after registration. There is a System Online Community, four Campus Online Communities and opportunities for Department Online Communities and Chapter Pages .

Electronic Communications Liaison: Harris Connect program manager on each University of Colorado campus.

Eblast: A term that is used to describe an e-mail that promotes one event or program.

Gatekeeping: The action of monitoring and delivering outgoing e-mail messaging via the Harris Connect E-mail Marketing application.

Solicitation: Fundraising activities conducted by the University of Colorado Foundation. Solicitation is a request for gifts and does not include the sale or advertising of any products or services.

CONFIDENTIALITY AGREEMENT Information in the Harris Connect system is the exclusive property of the University of Colorado and may be used only within the parameters outlined

below. Harris Connect tools and applications are used for University business to communicate electronically with and engage CU alumni, donors, parents, friends, legislators, faculty, staff and other constituents. Any other use of the Harris Connect tools is strictly prohibited. University of Colorado employees who view, enter, request or retrieve information from the Harris Connect system, agree to abide by the following policies by signing this agreement. In addition, if you send e-mail on behalf of or share any information obtained from the Harris Connect system to anyone who is not an administrative user of the Harris Connect tool you accept responsibility for insuring that the non-University, Foundation or approved volunteer users abide by the following policies.

POLICIES FOR ALL HARRIS ADMINISTRATORSGeneral:

- In coordination with the system director, each campus will manage its own Harris Connect program.
- Harris Connect administrators at the school, college, unit and department level will coordinate with its campus electronic communications liaison for leadership, scheduling, training and technical support.
- The Harris Connect tools are to be used exclusively for official University business that engages and informs alumni, donors, parents, friends, legislators and other constituents. E-mail communications to internal audiences are still being discussed.
- To gain access to the Harris Connect administrative tools:
- Staffing resources must be dedicated to support the use of the tools.
- External data lists must be uploaded [4].
- Training must be completed.
- Policies must be reviewed, agreed upon and signed. A printable form is provided at the bottom of this page.
- An Access Request Form must be submitted

E-mail Marketing

- Harris Connect is the **required tool for all mass e-mail communications** with external audiences (ie; alumni, donors, parents, friends, legislators and other constituents). For example, the use of e-mail communication tools for mass e-mailing such as Constant Contact, Outlook, etc. are prohibited. Data collected by use of such tools must be exported and provided to the CU Foundation via upload [4]. *E-mail communications to internal audiences are still being discussed*.
- Electronic newsletters to all campus or system records must adhere to a regular delivery schedule. Calendaring must be coordinated with the system director and other campus electronic communication liaisons during Users Group meetings.
- E-blast promotion or advertising of third-party/non-University products or services via e-mail communications is prohibited. Advertising in e-mail communications is limited to existing contractual agreements with Alumni Associations and athletics. Advertising is prohibited in school, college, unit and department e-mail communications.
- University and Foundation communicators will share upcoming e-mail communication schedules at regularly scheduled Users Groups and will coordinate with schools, colleges and departments on messaging, branding and delivery.
- To support the University of Colorado brand and deliver unified design and messaging, all Harris Connect administrators are required to integrate University brand standards in all e-mail communications. Communicators may choose from one of the following three

options (listed in order of preference):
    - Harris Connect pre-designed e-mail templates
    - Contract services with your campus' brand design division
    - Design a template independently. Template header and footer must meet campus brand standards.

Event Registration

- To support the University of Colorado brand and deliver unified design and messaging, all Harris Connect administrators are required to integrate University brand standards in all event registration templates. *Available templates are provided within the Harris Connect Event Registration tool.*
- Harris Connect administrators may choose to charge for registrations with credit cards. To do so, the school, college or department must:
    - Acquire an Internet Merchant Account (IMA) through the campus electronic communications liaison and the Treasurer's Office.
    - Have sufficient accounting staff in place to support credit card transaction processes.
    - Cover the cost of an Internet Merchant Account, which is a one-time fee of $1,500 – paid directly to Harris Connect Connect.

  More information [5].

- **All event registrations must require authentication**, by directing individuals to register for the Online Community before registering. For registrations that invite non-alumni, donors, friends and legislators, forced authentication is not required, but administrator must provide contact information that was collected during the event registration process to the CU Foundation Records Management team (records@cufund.org [6])
- Capturing event activity is not a function of the CU Foundation Records Management team department. After an event, admin must create an event in Advance and import EIDs to tie event activity to records. More information.
- The following fields must be included in all event registration forms:
    - Online community log in (required)
    - First name (required)
    - Last name (required)
    - E-mail address (required)
    - Phone number (required)
    - Mobile number
    - Home address (required)
    - Business address

Data on Demand (reporting)

- Harris Connect administrators may not use the Data on Demand tool for mailing list purposes. The Harris Connect database does not contain postal mail preferences (creating the potential to mail to individuals that have asked to not receive mail from the University) or the ability to household data (multiple mail pieces will go to the same address if alumni are married). To ensure the tool is not used for mailing list purposes, administrator accounts will not have access to addresses within the Data on Demand

tool. Mailing list requests should be submitted to the Advancement Reporting via the campus, school, unit or department development office contact, or directly to advancement.reporting@cu.edu [7] if a report cannot be produced out of Advance independently.

Records database, under User Management

- Only University of Colorado employees designated as Harris Connect administrators may view and modify records within the Harris Connect records database.
- Changes to a record may only be made by designated Harris Connect administrators and may only be made when the constituent directly requests the change.
- Volunteers may not have access to Harris Connect records database.

Online Communities

- Each campus shall provide and support a Harris Connect online community. But schools, colleges, units and departments may choose to purchase an online community or manage Chapter Pages within the campus' online community.
- Each campus, school, college, unit or department that has purchased an online community may choose which of the following applications to activate (or deactivate) as needed.
- Event Registration

- Yellow Pages
- Class Notes
- Groups 2.0
- Jobs / Mentor
- Permanent E-mail
- Facebook application
- Internet Processing via an Internet Merchant Account

- Each campus, school, college, unit or department that has purchased an online community is required to use the online directory, search and profile applications of the Harris Connect online community.

Data integration

- The only data integration with Harris Connect is with the CU Foundation's Advance database.
- It is at the CU Foundation's discretion to determine what data integration points it will accept into the Advance database. Currently, Harris Connect, CU-SIS, PeopleSoft and Lutz ADvantage (athletics) are supported.
- Queries and data in the Harris Connect system may not be reproduced or reused beyond their original intent.
- Data or e-mail queries may not be exported and reused outside of the Harris Connect Email Marketing tool for use in another email tool such as Constant Contact or Outlook.
- Changes to the data transfer from Advance to Harris must be submitted to the Director of Electronic Communications [8]at the CU System for review, approval and prioritization. Requests must include a statement of the business need for the change.The Director of Electronic Communications will submit the request to the

University of Colorado Foundation Reporting department. Lower priority changes may be grouped together for submission as a package of modifications. CU Foundation Reporting will provide a determination of the viability of the modification(s), as well as a timeline for implementation of the change(s).

RECOMMENDED POLICIES FOR CAMPUSES TO CONSIDERE-mail marketing

- In coordination with campus electronic communications liaisons, Harris Connect administrators will identify an audience and adhere to a delivery schedule for recurring e-newsletters.
- If a school, college or department does not have a Harris Connect account and would like to send an ad-hoc e-blast, it must be coordinated with the campus electronic communications liaison and scheduled at least three weeks in advance.
- If a school, college or department that has a Harris Connect account and would like to send a non-regularly scheduled e-blast or other e-communiqué, it must be coordinated with the campus electronic communications liaison and scheduled at least two weeks in advance.
- E-blasts announcing the same event or program may not be sent more than twice (original and reminder) to the same audience. Reminders shall be used sparingly.
- The campus electronic communications liaison will serve as gatekeeper for all e-mail communications. Doing so maintains a schedule and ensures branding requirements are adhered to.

Event Registration

- Harris Connect administrators may post an event to the system-wide calendar, the campus event calendar, may purchase a separate online community for an individual event calendar or all three. To post to the system or campus calendar, Harris Connect administrator will work directly with campus electronic communications liaison.

Click for printable version [9]

CU eComm Program

CU System *Internal* Electronic Communication Guidelines

University Relations has launched an electronic communication program designed for system administrative departments that communicate with internal audiences such as faculty, staff and/or students. Access includes training, support and resources to help make your communications successful. Given the large number of electronic communications, the tool should be ued judiciously and under the auspices of system administration vice presidents or their designees. Guidlines are:

Communications must:

1. Be relevant and fulfill an essential and compelling information need.
2. Be disseminated only to appropriate personnel across the CU system.3.Approved by a vice president or high level designee in your department

3. Adhere to university content and branding standards.
4. Meet CAN SPAM Act of 2003 requirements. (Find out more.) We'll help you with this one.
5. Be posted on the CU eComm Scheduling Calendar at least two weeks in advance.
6. Delivered via the university's eComm system (http://ecomm.cu.edu [10])

Examples of acceptable email communications from a system department:

- From Payroll & Benefits Services to systemwide faculty and staff announcing campus health clinics.
- From Academic Affiars to systemwide faculty announcing call for award nominations.
- From the Office of the President to all systemwide faculty, staff and students announcing significant budget issues.

Examples of emails that are not acceptable for dessemination:

- An email to all system empluyees announcing a birthday celebration for a department director.
- An email to all CU students announcing an alumni event hosted by the CU-Boulder Alumni Association.
- An email that is a classified ad (yard sale, house for rent, etc.)
- Any email promoting a product or service.
- Any email not directly related to the university.
- Any email in support or in opposition to political candidates or ballot initiatives.
- Any email on behalf of an organization external to the university.

The logistics:

1. To request access to the eComm tools go to http://ecomm.cu.edu [10].
2. To schedule an email, visit http://ecomm.cu.edu/internalmastercalendar/ [11] or email contact@cu.edu [8].
3. Announcements and notices of systemwide interest should be submitted for inclusion in CU Connections (hhttp://connections.cu.edu), the faculty and staff enewsletter.
4. Reference the CU style guide (http://www.cu.edu/style [12]) when writing your content.

ECOMM.CU.EDU | CONTACT@CU.EDU [13]

Groups audience:
eComm

Source URL:https://www.cu.edu/ecomm/policies-0

Links
[1] https://www.cu.edu/ecomm/policies-0

[2] https://www.cu.edu/ecomm/what-ecomm-0 [3] https://www.cu.edu/ecomm/request-access-form
[4] https://www.cu.edu/ecomm/new-users/request-access/data-lists
[5] https://www.cusys.edu/universityrelations/?page_id=167 [6] mailto:records@cufund.org
[7] mailto:advancement.reporting@cu.edu [8] mailto:contact@cu.edu
[9] https://www.cu.edu/ecomm/wp-content/uploads/2011/03/Policies6.pdf [10] http://ecomm.cu.edu
[11] http://ecomm.cu.edu/internalmastercalendar/ [12] https://www.cu.edu/style
[13] mailto:CONTACT@CU.EDU