

Text Messaging Policy

[Institution Name]

Messages intended for the campus community are best communicated by [INSERT YOUR COLLEGE/UNIVERSITY PLATFORM, e.g., Portal], [INSERT COLLEGE/UNIVERSITY WEB ADDRESS], regular email, and printed materials, such as flyers.

Text messaging is intended to supplement the [INSTITUTION NAME] communications strategy, and this policy is devoted to the texting medium.

The text messaging policy applies to any [INSTITUTION NAME]-affiliated individual granted permission to text groups of constituents regarding university-related matters.

NOTE:

This policy is intended for everyday, non-emergency use. Use your well-formed judgment in case of emergency, and contact [STAFF NAME] with any questions about [INSTITUTION NAME]'s emergency guidelines at [PHONE NUMBER] or [EMAIL ADDRESS].

Text Messaging Across the Student Lifecycle

Text messaging (which includes SMS and MMS messages) can be used by authorized university officials to relay information about cancellations, closures, admissions and academic requirements or deadlines, registration information, financial aid, alumni giving, and other matters that are time sensitive and necessary for student success.

Texting Prospective Students

For prospective student communication, it is recommended that you ask for permission to communicate via text message during the application process on a request for information form, inquiry card, or on the application itself. Ask them to individually opt in to each communication channel - text, email, phone, mail - for customized preferences. If a student does not choose to attend the institution, an opt-out should be assumed and they should be removed from receiving future communications.

Staff in the Admissions, Financial Aid, and Athletics departments will typically be responsible for texting with prospective students.

The types of text messages that can be sent to prospective students include:

- a. Application status** - submitted, incomplete, missing documents, etc.
- b. Financial Aid/Enrollment**- FAFSA deadline, submitted, missing documents, scholarships, work study, orientation, etc.
- c. Campus visit/tour/orientation information** - visit confirmation, reminder, survey, etc.
- d. Admission status** - congratulations on acceptance, enrollment next steps, advisor introduction, deposit due, etc.
- e. Athletics** - recruiting, official visit, letter of intent, etc.

Texting Current Students

When a student decides to enroll at the institution, ask them to update their communication preferences. Remind them of the types of messages they will receive through text, and ask that they opt in to receiving text messages from each department individually. Institutions may also obtain an opt-in across multiple teams for a similar use case (i.e. opting students into texting with Financial Aid, Academic Advising, Registrar, Retention, Bursar, Business/Student Accounts, etc.) for student retention or student success.

The types of text messages that can be sent to current students include:

- a. Academics** - add/drop deadline, major selection, transfer credits, etc.
- b. Class registration** - advisor meeting, class registration deadline, etc.
- c. Housing** - housing application/deposit, meal plan payment, RA introduction, etc.
- d. Financial Aid status** - FAFSA deadline, submitted, missing documents, scholarships, work study, etc.
- e. Events** - on-campus events, sports, fundraisers, volunteer opportunities, etc.
- f. Career services** - career fairs, resume review, internship placement, etc.
- g. Graduation preparation** - application for graduation, purchase of cap and gown, commencement details, etc.

Texting Alumni & Donors

To prepare for alumni engagement before the student graduates from the institution, ask them to update their communication preferences once again. Ask upcoming graduates how they would like to stay in touch with the university (email, phone, text), and what types of information they would like to receive.

Staff in the Advancement, University Foundation, and Alumni Relations departments will typically be responsible for texting with alumni and donors.

The types of text messages that can be sent to alumni and donors include:

- a. Giving requests** - Giving Day information, initiative-specific gifts, stewardship, etc.
- b. Donor recognition** - acknowledge past donations, share how gifts support the institution, special initiatives, etc.
- c. Alumni engagement** - networking events, regional events, homecoming celebrations, mentoring students, etc.

Text Messaging Procedures

Each department must appoint at least one authorized official to be responsible for monitoring and approving text messaging requests on behalf of their department to ensure compliance.

Opt-Ins and Opt-Outs:

Best practices indicate that message senders should gain contact consent and maintain their communication preferences. By gaining consent, you ensure you have an engaged audience for texts--which is better for everyone.

Opt-in includes students providing their name and mobile number to receive text messages from non-essential departments and ensure their contact information is held by [INSTITUTION NAME] is current.

If a student chooses to opt out of receiving text communications from a specific department, they are not automatically opted out from other departments. Students must have the ability to text 'STOP' or 'OPT OUT' at any time to opt out of messages. It is a best practice for the administrator of the institution's texting platform to run regular reporting and update their system of record to manage contact texting preferences. Students can also be notified of these modified preferences and asked whether or not they would like to receive university communications through another channel - email, phone, mail - or if they'd like to opt out of all types of communication.

Consent Collection:

Methods for obtaining consent should be documented and provable in the event that messaging activity leads to large spikes in opt-out rates or spam complaints. Doing so will give you a record of all opt-ins.

Places to ask for consent (opt-in) include:

- a.** Application or document submissions
- b.** Forms that ask for contact information
- c.** Websites or student portals
- d.** Event registrations
- e.** Appointment scheduling

- f. Requests for information

To obtain consent your collection method should include:

- a. What types of messages the recipient can expect to receive
- b. An indication of the frequency of messages
- c. A place to provide a valid phone number

Texting Preferences Storage:

Contacts opt into texting on a per-team basis. Each contact should have a separate preference per team or department which is aligned with how opt-in status is stored in Cadence.

Data fields associated with texting preferences should include:

- a. Contact name and mobile number
- b. Opt-in status
- c. Date/time that the status was last updated

Re-Establishing Consent:

Obtaining consent to text an individual does not mean that consent is provided indefinitely. Take into account when the consent to text was last established and store a date/time stamp along with a contact's opt-in status. Consent and opt-in should be re-established if a reasonable time (10-12 months) has passed without any messages being sent to the contact.

Text Message Content:

Messages should be as concise as possible (while still maintaining a conversational tone) and should address the student directly by name or with "you/your." They should include essential points and, if needed, further instruction (e.g. Check your email for full details).

Authorized text messaging officials should abide by all policies and ensure the following:

- a.** Content is accurate.
- b.** Wording is appropriate and fits the institution's voice and brand.
- c.** Tone is casual but professional and ends with a question when a response is desired.
- d.** List of recipients is correct and relevant to the message being sent.
- e.** Information within the message is directly related to the student and/or their studies.
- f.** Message clearly states the action that the student needs to take or how the information impacts the student, and who to contact for additional information.
- g.** All messages must be tagged with the appropriate identifiers (your institution's name and department) so recipients can immediately recognize who it's from. The exception being in follow up messages of an ongoing conversation.
 - For example, if an authorized official is sending an initial text message, open with, "Hi Becky, it's Chris Smith from Admissions at Mongoose University." On all subsequent communications, authorized officials can sign off at the end of a text message: "– Chris Smith, Admissions."
- h.** The number of messages received by a student are appropriate to ensure he/she will continue to regard the text messages as important information and does not choose to opt out of future communication.
- i.** Messages are sent with adequate time for a response, action, or activity.
- j.** Abbreviations and text messaging lingo are not used.
- k.** Emojis approved for use by the institution are used appropriately, with no more than one emoji per message. Not every text message should include an emoji.
- l.** Use hyperlinks sparingly, and instead, use text messaging to encourage a student to check their email or your website for more information. When you do use links, it should be the full website URL and not shortened through a service like bitly.
- m.** Initial messages must include instructions for opting out such as "Reply STOP to unsubscribe".

Emergency vs. Non-Emergency Communications:

Text messaging should not be used as the sole means of communicating an essential message or announcement. The text message must be supplemented by some other means of communication, such as an email, phone call, or paper notice, to ensure that all students, including those who have not opted in, receive the message.

Non-emergency text messaging should NOT be used for the following:

- a. Sole method of communication - to ensure that students that have opted out still receive this information.
- b. Communicating personal or confidential information (e.g. GPA, academic standing).
- c. Sending general information to large populations (e.g. Fall classes start Monday!).
- d. Personal matters (e.g. items for sale, farewell messages).
- e. Appeals on behalf of individuals or groups of students (e.g. to attend social, cultural, or sporting events, unless the student opted in for these text messages).
- f. Sending any messages containing social security numbers, passwords, credit card numbers, or any FERPA-protected data.
- g. Emergency alerts.

For any emergency-related communication, please consult [STAFF NAME] for the emergency communication policy at [PHONE NUMBER] or [EMAIL].

Response Timeframe:

As a best practice, text messages should only be sent during designated business hours (e.g. between 9:00am and 5:00pm Monday-Friday) to be respectful of a student's time and your team's availability to respond.

Any incoming replies to messages should be reviewed and responded to in a timely manner (preferably 24 hours), so as to provide optimal student support and prevent future messages from being ignored or a student opting out.

If a staff member is out of the office for an extended period of time, they are required to create an "Out of Office" away message with information about how a student can receive assistance in their absence, such as another staff member's contact information.

Text Messaging Approvals and Institution Policies

Individuals wanting a message sent on their behalf must complete the Online Text Request Form and receive approval before a text can be sent to students. Authorized officials do not need prior approval to send periodic messages.

Text messages containing images or video must be reviewed and approved in advance by the Marketing department to ensure proper logo usage, branding, colors, fonts, voice, etc.

All non-emergency text messaging services and software must be approved by the department of Information Technology.

Failure to comply with the above policy may result in the revoking of texting permissions.

Approved by Cabinet: [DATE]

Signature: _____