Sam Houston State University
A Member of The Texas State University System

Integrated Marketing Communication Policy IMC-04 Mass Email Policy

1. **Purpose of policy**: This policy provides guidelines on the sending of emails to the university community through Emma and who has access and rights to do so.

2. **Scope of policy**: This policy applies to all mass email messages sent through Emma. The use of other email tools is prohibited, with the exception of university-approved campus software with built-in email capabilities.

3. **Emma Subaccounts**: An Emma subaccount is a segmented section within the main Emma account designated for a specific department, program, or administrative unit at SHSU. It allows for organized management of email lists, templates, and campaigns.
   a. **Internal Subaccounts**: Used for communication within the university community. Emails sent from internal subaccounts are directed to recipients with university email addresses (e.g., @shsu.edu domain). This subaccount has no opt-out messaging.
   b. **External Subaccounts**: Used for communication with individuals outside the university. Emails sent from external subaccounts are directed to recipients with non-university email addresses (e.g., Gmail, Yahoo). This subaccount requires opt-out messaging.

4. **Emma Subaccount Permissions and Approval**: SHSU utilizes Emma subaccounts to manage email communication within the university and with external audiences. Access and permissions for these subaccounts are determined by their intended use:
   a. **Access**: Restricted to authorized users within the designated department, program, or unit for both internal and external subaccounts. Users can manage email lists, templates, and campaigns specific to their area.
   b. **Approval**: Sending emails to external recipients or large internal audiences (e.g., all faculty) requires additional review or approval to ensure appropriate content and adherence to university policies. For external subaccounts, all emails require review and approval to comply with university communication policies, anti-spam regulations, and appropriate content for external audiences.

5. **Mass Email Review and Approval**: To ensure consistent messaging, brand adherence, and optimal deliverability, all emails meeting the definition of a "Mass Email" at SHSU must undergo review and approval by IMC before sending. This applies to emails sent from both internal and external subaccounts with the exception of subaccounts that have an approved manager.
   a. **What emails require review?** Emails are considered mass emails if they meet one or more of the following criteria:
      i. Targeted to a large audience, including university-wide audience lists (e.g., all faculty, all staff, and/or all students).
      ii. Sent to over 5,000 internal recipients with SHSU email addresses.

   iii. Sent to external audiences through an external subaccount, regardless of recipient count.
  b. **Who performs the review?**
   i. Divisional Review (as needed): Approval and feedback documented in Asana.
   ii. Content Review: The content team will review your email for accuracy, clarity, and adherence to university communication policies. This ensures your message is informative and professionally written.
   iii. Creative Review: The creative team will ensure your email adheres to SHSU's branding guidelines for a consistent visual identity.
  c. **Timeline for Review**:
   i. For a smooth review process and timely sending of your mass email, we recommend submitting your email for review well in advance of your desired send date.
   ii. Minimum: 2-3 business days before your desired send date.
   iii. Optimal: For complex emails or newsletters requiring extensive review, submitting 1-2 weeks in advance is ideal.
   iv. **Please note**:
    1. Submitting your email early allows for content and creative review, as well as any internal scheduling or technical configurations needed by the IMC team.
    2. If you would like the IMC team to create your email in addition to reviewing it, please factor in additional lead time for the design and content development process. Discuss your specific needs and desired turnaround time with the IMC team to ensure they can accommodate your request.
  d. **Daily Limits (Internal)**:
   i. This policy establishes a daily limit on the number of emails sent to broad internal audiences to create a more streamlined and efficient communication environment for faculty, staff, and students.
   ii. To promote focused communication, emails sent to broad internal audiences (all faculty, all staff, all students) are limited to no more than 3 per day.
    1. Emails exceeding the daily limit will be automatically queued for delivery on the following business day.
    2. **Exceptions:** Urgent communications requiring immediate university-wide notification may be approved by the Chief Marketing Officer (CMO) on a case-by-case basis or the subaccount manager.

6. **Contact Archiving for External Subaccounts:** To optimize our use of contact space within the Emma account, we have implemented an archiving process for contacts in external subaccounts.
  a. Any contact within an external subaccount who has not received an email for a period of 12 months is subject to be archived.
  b. This archiving process aims to:
   i. Maintain email deliverability: By removing inactive contacts, we can improve the overall health of our email lists and enhance the deliverability of future campaigns.

      ii.   Optimize contact space: Archiving inactive contacts helps us manage the limited contact storage available in the Emma account more efficiently.
c.   Archived contacts:
      i.   Will no longer be included in future email campaigns.
      ii.   Remain accessible within the Emma platform for historical reference and potential future re-engagement (if permissions are renewed).

Reviewed by: Jeff Harris, Chief Marketing Officer & Public Information Officer
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