



# DAVIDSON COLLEGE Office of Alumni & Family Engagement

## Process for Student Groups Sending Emails to Alumni

### Overview

The Alumni and Family Engagement (AFE) Office is the database of records for alums and families for Davidson College. AFE regularly sends emails to these constituent groups. AFE coordinates with other departments within College Relations, and the larger college, to plan content and timing for all email communications. Communications typically include newsletters, event invitations and reminders, important announcements from the college and more. AFE staff accept requests for email communications from campus partners and student groups and approve or adjust timing after reviewing and considering other scheduled emails.

The Office of Alumni and Family Engagement is not able to share lists with students or other alumni; however, it will send out communication on behalf of the requesting organization using the following process.

### Type of Email- BBIS vs CRM

When requesting AFE to send an email, it is important to determine which type of email needs to be sent:

- BBIS- General information and announcements not tied to a specific event.
- CRM- Invitations and related communications associated with a specific event and/or event registrations.

Most emails sent from campus partners are BBIS emails.

### Audience/Lists

Determining the target audience for any communication is an important early step. Each email is sent to a list(s). Some lists exist and are used regularly within Blackbaud. Other lists need to be requested, which adds time to the process of sending an email. Consider early on who the target audience is. Emails can either be sent to all alums, for example, or can also be segmented, i.e. the same email sent to different audiences with or without an adjusted message. Once requested, allow one week for the list creation if the list is not a standard list already available.

### Message

The office requesting email communication should send content to AFE. AFE will not create content for other offices. Consider the audience and be sure the content sent is relevant and appropriate. Please know our data shows that segmentation significantly improves open rates and click-through rates.

***Before sending content, review it thoroughly and share it with anyone who will be making changes to the content.*** The email should be as close as possible to the final message. After it has been created in Blackbaud it will be sent back to the requestor for review and corrections/changes which should be



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minimal. Please note, multiple changes and reviews will delay the process and the project may not meet the deadline that has been set.

### Process

- Submit [email communication request form](#) which will include the desired date and audience/list of the email(s) to be sent as well as the date all content for email(s) will be sent to AFE.
- AFE staff will consult the communications calendar and report any suggested alternative dates, as needed.
- Provide content to AFE by agreed-upon date and time. Allow ample time (ideally at least 5 full business days) between providing content and when you want the email sent.
- If the email is for an event, all information needed to create the event, registration form, reminder emails and follow-up communications will need to be created and dates you would like those sent (i.e. reminders, see you tonight, end of event surveys, RSVP dates)
- For all emails, specify the sender that will be noted on the email itself, text for the subject line, any text for the teaser line that appears at the top of the email and the address for replies to the email(s).
- Sponsoring departments should send any graphics or pictures to be included in the requested email(s). Images should not contain text as they are not accessibility compliant. Editing (sizing, compression, accessibility requirements) takes additional time for preparation so please factor in these steps.
- AFE will share draft messages with the requestor so the content and formatting can be checked before the email is sent. Please note edits and changes which require significant updating may delay the sending of the email.

All questions about this process should be directed to Chelsea Savage '21 at [chsavage@davidson.edu](mailto:chsavage@davidson.edu).