

PAGR-03.1 — Procedures for Students

Policy PAGR-03: Constituent Relationship Management-Communications Policy

See also:

- [Policy PAGR-03: Constituent Relationship Management Communications Policy](#)

Procedures

1. Student Population

- a. The student populations include:

Suspect	An individual who has been identified as a potential prospect of one or more campus, typically received through a purchase of names from an outside entity
Prospect	An individual who has actively responded to or made an inquiry of an IU campus.
Applicant	A prospect or a non-prospect individual who submitted an application to an IU campus.
Admit	An Applicant who has been accepted as a student at an IU campus.
Enrolled	An admitted student who has enrolled for classes at a campus.
Former Student	A former student who is no longer taking classes at an IU campus. Note: a former student may not have graduated from IU
Alumni ¹	Any of the above student constituencies may also be an alumnus

For purposes of this document, the two primary categories of student data will include prospective students (i.e. suspect, prospect, applicant, and admit) populations; and enrolled students which cover enrolled or former. A constituent will be considered a member of a campus, school, unit or program's constituency for the purposes of communication when:

Prospective Students:

¹ Access to *student data* related to alumni of the university is governed by these Procedures for Students under the auspices of CRM Communications Policy. Procedures for *communication* with alumni of the university are governed under the Procedures for Advancement Constituents under the auspices of the CRM Communications Policy.

- i. The constituent has expressed an interest in pursuing admission at a particular campus, school, unit or program
- ii. The constituent has or will receive a degree from the campus, school, unit or program and has expressed an interest in pursuing a particular program of study
- iii. The constituent is a member of a university-sanctioned club/activity/program
- iv. The constituent has subscribed to a recurring communication or attended a recurring event sponsored by the campus, school, unit or program

Enrolled Students:

- i. The constituent is currently enrolled at the campus(s)
- ii. The constituent has registered for a future term at the campus(s)
- iii. The constituent has or will receive a degree from the campus, school, unit or program
- iv. The constituent is a member of a university-sanctioned club/activity/program
- v. The constituent has subscribed to a recurring communication or attended a recurring event sponsored by the campus, school, unit or program

b. Accessible Student Data

The following prospective student data will be accessible to users:

- i. Name and contact information (e.g. address, phone).
- ii. The prospective student's status or relationship to the university

The following enrolled and former student data will be accessible to users:

- iii. Name
- iv. Local and permanent address
- v. E-mail address
- vi. Primary phone
- vii. Major field of study
- viii. Dates of attendance
- ix. Admission or enrollment status
- x. Campus
- xi. School, college, or division
- xii. Class standing
- xiii. Degrees and awards
- xiv. Activities, sports, and athletic information

c. Inaccessible Student Data

- i. Country of citizenship is restricted information and should be handled accordingly.
- ii. Cell phone information requires additional consent from a student, unless the student has included the cell phone number in the primary phone field.
- iii. If an enrolled student restricts his or her directory information, any such restricted information will be unavailable to many users of the system.

2. Student Communications Generally

There are two types of communications that may be sent to students: Official Communications and Engagement Communications. All communications will be considered engagement unless it meets the definition of official.

a. **Official Communications to Prospective Students:** Mass email communications sent to prospective students must be related to recruitment activities by the campus Admissions office (e.g. purchased names, inquiries concerning the campus/programs, event attendance, contacts at high school fairs, etc.). In collaboration with the campus Admissions office, communications may also be sent by schools/departments/units.

Examples include:

- i. Campaign communications to students who have applied to the university
- ii. Communications to students who submit "Request materials" inquiries
- iii. Individual Communications regarding the status of an application.

b. **Engagement Communications to Prospective Students:** Student Engagement communications are communications which engage the student in a manner which is not critical to the mission or business of the University, but further develops the relationship the individual has with the University. Typically such communications do not include a call to action on behalf of the student, but a more passive message of information or camaraderie. In collaboration with the campus Admissions office, communications may also be sent by schools/departments/units.

Examples include:

- i. Information about an upcoming lecture presented by an academic related to the field of interest.
- ii. Campaign announcement of upcoming special events
- iii. Individual communication regarding the student life opportunities on campus

c. **Official Communications to Enrolled Students:** Campuses have established policies that mass e-mail to all students will be limited to emergencies, urgent needs, and required notifications related to compliance, student enrollment, progress toward degree, and mission-critical messages surrounding student advancement toward degree on campus.

Examples include:

- i. Notices to enrolled students regarding availability of registration for next term and registration appointments
- ii. Welcome Back message at the beginning of a term regarding federally mandated campus information and disclosures.
- iii. Notifications of cancelled classes, changes in building/room or time for an enrolled class
- iv. Student death information
- v. Messages regarding campus vandalism, flu shot availability, etc.
- vi. Spring Break safety message
- vii. Quell rumors or fears

d. Engagement communications to Enrolled Students: Engagement communications to this group should be geared toward specific “segments” of the population (e.g. students enrolled in Biology, students in the School of Public Health, etc.). Communications in this category must provide an opt-out. Requests to send engagement communications may be fulfilled by other publicity venues on the campus such as campus specific newspapers; public posting boards; printing and sharing with colleagues on campus.

Examples include:

- i. Fliers about governmental representatives lecturing on an IU campus
- ii. Notices about need for volunteers at the Glick Eye Center
- iii. Academic speakers and lecturers
- iv. Auditorium events
- v. Athletic events
- vi. Alumni events and opportunities; e.g. the first message informing a constituent about the opportunity and benefit to joining the Alumni Association sent to rising seniors.

3. Approvals for Student Communications

Any campus or unit that plans to contact a group of student constituents, by methods including but not limited to, e-communications, mail, newsletters, notices, bulletins, solicitations or any other contacts, whether in electronic or hard copy form, must obtain approval for the contact from the appropriate authority listed below.

- a. Prospective students
 - i. To the entire prospective undergraduate student population of a campus, by the campus Admissions Office
 - ii. To the prospective undergraduate student population of a school, department, program or activity, by the Senior Executive Officer of the school, department, program or activity, in collaboration with the campus Office of Admissions.
 - iii. To the prospective graduate or professional student population of a campus, school, department, program or activity, by the Senior Executive Officer of the school, department or program.
- b. Enrolled students (undergraduate, graduate, professional)
 - i. To the entire enrolled student population of a campus, by the Chancellor or Provost, or a designee as determined by each campus
 - ii. To the entire enrolled student population of a school, department, program or activity, by the Senior Executive Officer of the school, department or program.
- c. Exceptions

Any exceptions shall be granted at the discretion of the Chancellor or Provost. It is assumed that approvals and exceptions will be handled via standard System routing approval processes.

History

The policy was endorsed by the CRM Policy Committee on April 26th, 2013.

The policy was revised and endorsed by the Lifetime Engagement Functional Council on July 22nd, 2013.