Policy and Guidelines on Messaging to Groups

Transmission of messages to groups of recipients via directed, addressed electronic communication methods shall take place at Loyola University Maryland in accordance with the policy below.

1. PURPOSE

Loyola University Maryland is committed to the use of electronic communication to improve the efficiency of information exchange, to reduce environmental (paper) waste in communications, to improve the University's ability to provide targeted services, and to help build community.

This policy is intended to manage the volume of messages addressed to our constituents, to ensure that addressed, directed communications to groups of recipients by the University remain reliable, and to ensure that messages sent to constituent groups are supportive of University relationships with its constituents.

This policy will not limit or disrupt typical communication within classes, departments, divisions, programs or other University organizational units.

2. SCOPE

This policy covers addressed, directed messages sent to groups of individuals by Loyola students, faculty, staff, administrators, and contractors employed by the University. Examples of addressed, directed messages within the scope of this policy are those sent via systems such as e-mail, voice mail, and instant- or text-messaging. This policy also covers messages sent within web-based content delivery systems, such as web portal systems, where the content of a web page is determined by the identity of each user or their membership in a group.

Communications through non-addressed, mass-communications methods such as broadcast radio, broadcast television, digital signage, posters, or public-facing web sites, including social media, do not fall under the scope of this policy.

This policy outlines certain responsibilities for the use and management of some Loyola-owned or operated communications systems, and the use and management of certain data.
including directory information, targeted groups, and distribution lists. This policy will not limit or disrupt typical communication within classes, departments, divisions, programs or other University organizational units.

This policy applies to all current students, employees, and contractors of the University, as well as to all users of Loyola messaging systems.

3. DEFINITIONS

**Data Stewards:** The Data Stewards are those individuals who have been formally designated as the originators and/or maintainers of specific data elements, fields, and records in the University information systems.

**Relationship Stewards:** Relationship Stewards are departments and individuals designated by the University to manage the relationships or aspects of the relationships that the University has with particular constituencies of the University community.

**Loyola Voice Mail Systems:** These include any and all voice mail systems provided or managed by the University.

**Group Voice Mail Messages:** A group voice mail is one that is sent to everyone or groups of recipients on the University phone system.

**Loyola E-mail Systems:** These include any and all e-mail systems provided or managed by or on behalf the University.

**Distribution Lists:** A managed list of recipient addresses in an e-mail, voice mail, or other system, which can be referenced as a single recipient entity for sending a common message. Distribution lists may include, for example: all members of the University community, or subsets, such as all alumni, faculty, all students, all biology students, all graduate students. Distribution lists may also be created and used for other user groups in accordance with this and other University policies. Certain distribution lists may be automatically generated based on data available to the University, and some may be manually created and maintained. Certain distribution lists may be generated and used on an ad-hoc basis, and some may be maintained indefinitely.

**Involuntary Distribution Lists:** Certain distribution lists may be involuntary, meaning that recipients cannot elect to be excluded from receiving messages sent to the lists.

**Voluntary Distribution Lists:** Certain distribution lists may be voluntary, meaning that particular users will be included or excluded from the lists by default, but users may be authorized to opt-out or opt-in at their discretion, or the discretion of their supervisor.
4. POLICY

The President, University vice presidents, deans, the Office of Marketing and Communications, designated relationship stewards, and designees of these parties are authorized to send messages to groups of recipients in the Loyola University Maryland community. Such messages must be in compliance with this and other University policies.

Certain University agents are authorized to create and/or use distribution lists for targeted populations. These agents include the president's cabinet, executive officers, the deans, and their designees, particularly the stewards of University data, including for example: records, financial aid, and human resource officers.

Permission to send messages to a distribution list of individuals within a particular University constituency must be obtained from the Office of Marketing and Communications in conjunction with the appropriate Relationship Steward.

Only approved tools and methods, as determined by Technology Services, may be used for e-mail and voice mail distribution. Technology Services is responsible for procuring and managing message distributions systems and integrating them where necessary with University messaging systems.

Messages sent by the University to external audiences and pertaining to the business of the University shall only be sent using approved systems and from approved source and reply-to addresses. Content of the message and timing of the delivery must be reviewed by the Office of Marketing and Communication in conjunction with the appropriate Relationship Steward. Requests for alumni lists should be sent to the Office of Alumni Relations.

In cases where such exposure could potentially harm a recipient, the detailed list of recipients of a message must not be visible by other recipients on the list. For example, the list of individual recipients in a sensitive e-mail message shall not be visible in the TO: or CC: or any other e-mail header field such that a program or recipient might view the information.

Delegation of authority: Agents to whom authority to send messages to groups of University constituents has been delegated may not further delegate this authority without the express written permission of the appropriate relationship steward.

Those officials with the authority to author and/or approve messages to groups of recipients are responsible for ensuring that their designees receive adequate training and guidance regarding the appropriateness of content and the use of proper techniques for posting messages. These officials are responsible for the content of messages sent under their authority.
It is generally inappropriate to do any of the following. Exceptions must be approved by the Office of Marketing Communications and the appropriate relationship stewards.

- Solicit support (financial or otherwise) for charity, or special causes not connected with the Loyola University Maryland, its strategic plan, or in conjunction with the Office of Advancement.
- Send mass messages of a commercial, political, or lobbying nature. No University resources can be used for political activities.
- Forward chain letters or electronic "petitions" or ask recipients to forward messages.
- Send anonymous broadcasts.
- Include attachments if the information is or can be posted on a University web site or portal.
- Maintain databases or distribution lists of groups of individuals separate from the University system of record, which is Colleague.

5. RESPONSIBILITIES

Relationship Stewards: Relationship stewards are responsible for ensuring that the appropriate procedures are in place in conjunction with the Office of Marketing and Communications to review and approve messages prior to posting. Relationship Stewards for various constituent groups are defined as follows:

- Current Undergraduate Students: VP Academic Affairs or VP Student Development
- Current Graduate Students: School Deans or Director of Graduate Student Services
- Prospective Undergraduate Students: Dean of Undergraduate Admission
- Prospective Graduate Students: Director of Graduate Admission
- Alumni: Director of Alumni Relations
- Faculty: VP Academic Affairs
- Staff and Administrators: AVP of Human Resources
- Parents of Current Students: VP Student Development or VP Advancement, VP Academic Affairs
- Friends of the University: VP Advancement or VP Academic Affairs

Loyola University Voice Mail: The Department of Technology Services is responsible for the management of the Loyola telephone voice mail system.

Loyola University E-mail and Instant Messaging: The Department of Technology Services is responsible for the management of the Loyola e-mail and instant messaging systems.

Loyola University Emergency Notification System: The Department of Technology Services is responsible for the management of the Loyola emergency notification system,
a web- and text-message-based system capable of sending messages to addressed groups of users in near real-time.

Constituent Data and Directory Information: Accuracy of constituent data in the online directory is the responsibility of each individual member of the University community, Human Resources, Records and Alumni Relations and Data Stewards.

Responsibility for Receiving Messages Sent by the University:

- Official electronic communications sent from the University are assumed to be received by the recipient. Compliance with the information contained therein becomes a responsibility of the recipient.
- Current faculty, staff and administrators are responsible for receiving messages that have been sent to their Loyola e-mail addresses. Certain staff members may be exempt from this requirement as determined by their supervisors based on their job duties.
- Current undergraduate students are responsible for receiving messages sent to their Loyola e-mail address.
- Current graduate students are responsible for receiving messages sent to their Loyola e-mail address.
- Current students are responsible for the information contained in all official e-mail messages sent by the University and its agents. Failure to use e-mail resources is not an acceptable excuse for failure to comply with directives sent by the University via e-mail.

Forwarding of Messages: In cases where an individual has chosen to forward messages, whether individually or automatically based on rules that user has set up, the user is responsible for managing that forwarding. Any responsibility that he or she may have for receiving any particular message does not change because the message was forwarded.

6. EXCEPTIONS AND GRIEVANCES

Emergency Situations: In emergency situations centralized communications may be necessary to ensure that accurate information is being disseminated. During such incidents all broadcast messages will be coordinated through the Office of Marketing and Communications, consistent with Loyola's emergency operating procedures.

Other Provisions:

- Any individual wanting to send a broadcast message that is not in keeping with the provisions of this policy, but considers it to be of vital importance to the community, shall send a request for an exception to the Office of Marketing and Communications.
- The Office of Technology Support should be notified of any inappropriate messaging. For example; phishing messages which appear to come from a University official asking for restricted information such as an account name and
password, or other personally identifiable information. Technology Services personnel will take appropriate action, possibly including blocking responses to the e-mail, depending on the severity of the situation.

- Any individual believing that private or sensitive information has been disclosed must notify the Office of Technology Support, or notify his or her supervisor if an employee of the University. The matter will be referred to the appropriate University official and appropriate steps will be taken.

7. **ENFORCEMENT**

E-mail distribution list use is subject to the terms of the Loyola University Maryland Computer SystemsAcceptable Use Policy, as is voice messaging and the distribution of portal content.

8. **GUIDELINES**

The following statements are not policy of the University, but are provided as guidelines for senders of messages to use in determining how to comply with the intentions of this policy regarding communication to groups of recipients.

The level of authorization required for sending particular messages should be directly related to the number of recipients and the sensitivity of the message contents.

Questions about appropriateness of message or audience may be addressed to the Office of Marketing and Communications in conjunction with the appropriate Relationship Steward.

Below are appropriate guidelines to follow when sending a broadcast message;

- Consider more efficient mechanisms for dissemination of the information, such as the University portal or NewsHound.
- Ensure that the subject of the message is relevant to the audience, is of interest and not repetitive, and is related to the topic of the list. (e.g., do not send a message to all employees if the message is applicable only to faculty and students).
- As a general principle, the larger the number of recipients, the greater the need for establishing that the recipients will find a particular message useful, and that the message conforms to University goals regarding its relationships with the recipients.
- Ensure that the message is clearly worded and not offensive.
- Consider sending the message through representative groups.
- When possible and appropriate, each message will clearly state both who sent the message and the recipient groups (e.g., all main campus faculty, all students, etc.) Specifically for e-mail, it is recommended that the recipient groups be listed at the
beginning of the e-mail message. For example: "To Faculty, Staff, Administrators and Students"

- Except in cases where divulging a recipient's status as a recipient, or other association with a group or program may potentially harm a recipient, individual recipient's addresses can be visible to other recipients where it supports the individuals' and groups purposes.
- Replies by recipients to group messages are within the scope of this policy, and should be sent only back to the original sender or other appropriate designee, not the entire list, unless such group response supports the purpose of the original message and complies with all University policy.

9. APPROVAL

Preparer name and Title:  Louise Finn, Chief Information Officer

Preparer Signature:  

Date:  11-4-13

Reviewed and approved by the Loyola Conference on October 29, 2013

Final Approval Name and Title: Brian Linnane, S.J., President

Final Approval Signature:  Date:  

Date:  11-4-13

10. REVIEW CYCLE

This policy will be reviewed as needed, but particularly when there are significant changes in messaging systems or policies, and/or underlying information systems or services.