

Mass communication with undergraduate applicants and prospective undergraduate applicants

NB 'Prospects' is used to refer to all of our prospective students, both applicants and those who have not yet applied. 'Applicants' is used where guidance relates specifically to applicants.

Purpose

The purpose of this document is to provide guidance:

- 1) To reduce the risk of prospects receiving potentially misleading or confusing messages from the University. Failure to comply with this guidance carries significant reputational and potential legal and financial risk.
- 2) To ensure that prospects receive timely, clear and helpful communications from the University so that they look favourably on Bath, and to help applicants to progress through the application process in a straightforward manner.

Scope

This guidance covers all 'mass'¹ outbound communications activities targeted at undergraduate prospects prior to arrival². This includes applicants at any application stage, taking appropriate account of the changing status of their application(s).

The guidance applies where communications require the use of individual contact details provided by the prospect, and held by the University within SAMIS and CRM. 'Contact details' include email address, mailing address for paper-based communication, and mobile phone number for SMS.

Separate guidance has been developed to address the specific requirements of communication with postgraduate prospects (PGT and PGR).

Who should follow this guidance?

The below will at times require access to undergraduate prospect contact information in order to implement communications activities in the period before a student arrives at the University:

- Academic Departments
- Accommodation and Hospitality
- Admissions & Outreach
- Alumni and Development
- Faculty and School of Management Marketing teams
- International Recruitment Office (IRO)
- International Student Advice Team (ISAT)
- Marketing & Communications
- Student Experience Officers
- Student Services

¹ A mass communication is defined as any outbound communications activity which is directed at more than one individual. Activities outside the scope of this guidance would include a response to a query from a single applicant which is sent to that applicant alone.

² Excluding pre-arrival communications sent by SREO.

- Any other central, departmental, Faculty or School-based service communicating directly with applicants.

The headlines

1. Communicating departments must develop **communication schedules** in advance of each application cycle. The Student Recruitment Editorial Group is responsible for reviewing these as a whole and approving them.
2. The communicating Faculty or Department is responsible for implementing an **effective quality control process** for communications content.
3. **Mailing list templates** will be provided by Admissions & Outreach to communicating departments. Mailing list users must be trained before they use these lists to send mass communications.
4. Mass communications to undergraduate prospects **must be sent via the CRM system** (apart from in the specific instances listed in 'the detail' below).

The detail

1. Communication schedules

Communicating departments must develop communication schedules in advance of each application cycle. These should include planned Department Open Day communications³.

- 1.1 The Student Recruitment Editorial Group⁴ is responsible for reviewing and approving these communication schedules, looking at them as a whole to ensure that: a) recipients receive communications that complement each other, at the appropriate point in their application journey; b) there is consistency, when appropriate, regarding which groups of applicant we are trying to reach with which information.
- 1.2 The Student Recruitment Editorial Group chair is responsible for organising regular prospect communication updates.
- 1.3 Those communicating with prospects do not need to seek agreement for every individual communications activity within an agreed communications schedule but must undertake only those activities specified in the agreed schedule. There is no requirement to send all individual communications to be checked by Admissions & Outreach or Marketing and Communications prior to sending. Only communications outside the agreed schedule require this check.
- 1.4 Those communicating with applicants need to be aware that if circumstances change during an application cycle, various aspects of a communication schedule may need to be amended. Admissions & Outreach or Marketing & Communications will advise communicating departments accordingly.

³ Excluding invitations which will continue to be sent via SAMIS for 2017 cycle.

⁴ This group meets quarterly (and additionally as required). Chaired by Student Marketing Manager and Digital Editor: Student Recruitment and Experience. Other permanent members: Head of Admissions, Head of UK and EU Recruitment, Head of International Student Recruitment, Faculty Marketing Managers, CRM Officer, AHS Marketing Manager, Graduate School Managers. Extended members: Head of Student Services, Head of ISAT, Head of WP, Head of Events, Head of Academic Skills, Student Finance team representative, SU Marketing Manager.

- 1.5 Since the application status of individual applicants will change on a regular basis, no dataset of applicant contact details must be used for follow-up communication outside the agreed communication schedule without prior approval of the Head of UG Admissions or designated alternate (Communications Officer).

2. *Quality control processes for communications content*

The communicating Faculty or Department is responsible for implementing an **effective quality control process** for communications content.

- 2.1 This quality control process must be agreed with the Director of Marketing & Communications who retains ultimate responsibility for communications content.
- 2.2 It is important that communications content is CMA (Competition and Markets Authority) compliant – see appendix. Specifically, the offer letter and T & Cs must be sent to applicants in a ‘durable medium’. Admissions and Outreach are responsible for this (currently T & Cs in pdf format and offer letters as an html attachment).

3. *Mailing list templates and data usage*

- 3.1 Admissions & Outreach will provide a mailing list template to departmental and Faculty data users and will train them to use the templates correctly. The CRM Officer or relevant CRM Super-user will train data users to create and send the email within ClickDimensions (CRM).
- 3.2 Following receipt of the mailing list template, it is the responsibility of the user to ensure that they have received training in how to use the template correctly, to create and send the communication correctly and to ensure that contact details are only used for the agreed purpose.
- 3.3 The contact details of leads (potential students) can be uploaded into the CRM system by the CRM Officer, for example for International Recruitment Officers in order to follow up after an in-country event. Lead information must be gathered within consistent categories as advised by the CRM Officer in order to make sure that the data can be uploaded and used successfully.
- 3.4 Minimum prior notice of 1 week must be provided to ensure all requests relating to newly commissioned mailing list templates or lead data uploads can be accommodated.
- 3.5 Data users are to use CRM training documentation and any other training aid provided by Marketing & Communications (such as ClickDimensions webinars/videos) for the activities associated with scheduling and sending communications. All CRM training materials can be found here [provide link] and CRM training and refresher sessions organised via the CRM Officer.
- 3.6 To ensure there is transparency on how prospect data is being used, neither data nor mailing list templates should be requested from another team (e.g. SREO, Faculty Marketing offices, departmental staff) unless specific authorisation from Admissions & Outreach has been provided for this in advance. Separate guidance applies to: a) invitations to Departmental (UCAS) Open Days for which the datasets are created within Departments and mailed from SAMIS and b) current student data requests which should normally be made direct to SREO.

4. Mass communications to prospects must be sent via the CRM system

- 4.1 Communications must be sent direct from CRM except for certain process-specific communications and Departmental (UCAS) Open Day invitations which will continue to be sent from SAMIS.
- 4.2 Any external datasets must be checked and uploaded into CRM by the CRM Officer before these datasets are used for communication with applicants/prospective applicants.
- 4.3 The CRM Officer is responsible for uploading external datasets to CRM and advising communicating Departments on how to gather the data so that it can be used successfully within CRM.

All are requested to note that communication with UG applicants in the period surrounding confirmation, clearing and adjustment carries increased risk and requires strict compliance with the above guidance and any agreed or specified embargo period.

Appendix: about applicant communications, CRM, CMA and risk

The launch of CRM is an opportunity we must take to stop using multiple tools to manage communications with applicants, and to improve our quality control processes.

Moreover, universities must now comply with consumer law when dealing with applicants and students. Competition and Markets Authority (CMA) guidance particularly pertinent to communication with prospects and applicants⁵:

- “You must give students the information they need to make an informed decision before they apply. This information includes:
 - course content and structure
 - the total costs of the course including tuition fees and any additional costs associated with the course, such as field trips, lab equipment or bench/studio fees
 - your terms and conditions, including any rules and regulations that students are bound by
- Before, or at the latest when, offering a place to a student, you must tell them of any changes since they applied and give ‘pre-contract information’ which includes course information and costs, information on complaints handling, and any cancellation rights.
- Your terms and conditions, including rules and regulations, should be clear and transparent.
- You need to make sure that surprising or important terms are specifically brought to students’ attention.”

In addition to these, we must provide confirmation of the contract and pre contract information in a durable medium, which has implications for the format in which the offer letter is provided.

Finally, it is important that a departments’ communications are not viewed in isolation but in the context of a) application processes and b) the communications applicants receive from other departments within the University. This is key in order to ensure that all prospect communications are timely, clear and helpful, and provide a good impression of the university.

⁵ www.gov.uk/government/publications/higher-education-providers-short-guide-to-consumer-protection-law