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Alumni and Advancement Services Office

Customer Service Charter

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## 1 Introduction

The customer service charter outlines our service commitment to our alumni, clients and stakeholders and outlines how our clients and stakeholders can help us to provide them with a quality service.

Our service commitment takes into consideration RMIT best practice, data integrity and confidentiality in line with Privacy Policy at RMIT University, which is based on the Information Privacy Act 2000 (VIC).

This document has a number of major audiences; these include but are not limited to:–

- Alumni and Advancement Services staff members
- Authorised Alumni Networks
- RMIT Academic Portfolios/Colleges
- RMIT Non Academic Portfolios
- Authorised Government Bodies E.g. Australian Council for Education Research

## 2 Customer Service Standards

In providing our services, we wish to ensure that our vision for customer service can be managed and will become a reality. A set of standards have been developed to assist Alumni and Advancement Services in managing internal and/or external client expectations and alumni relations effectively and efficiently.

These Customer Service Standards are presented in five categories, which relate to:

- Commitment to the alumni community
- Requests for an ongoing service
- Requests for an adhoc service
- Telephone contact
- Written communication

### 2.1 Commitment to the Alumni Community

Our *customer service commitment* to the alumni community is to:-

- Abide by privacy legislation and stringent regulatory controls – respect for alumni privacy at all times; alumni contact details will not be released to third parties.
- Ensure communications to the alumni community is relevant and informative.
- Respect alumni members wishes to 'Opt In' or 'Opt Out' of receiving communications.
- Ensure that no more than one email will be sent to the same alumni group within a two week period.
- No more than two survey requests will be sent to the same alumni group per year.

### 2.2 Requests for an Ongoing Service

*Requests for an ongoing service* refer to any situation where a client requires our services beyond their initial approach or contact. When responding to this type of request, Alumni and Advancement Services should:

- Provide the service within a maximum period of 10 working days.
- If due to extenuating circumstances we cannot deliver the service within 10 working days, then within 3 working days the customer will be advised of this in writing. When writing, the customer will be advised of the date the service will be provided.

## 2.3 Requests for an Ad hoc Service

*Ad hoc requests* refer to any situation where a client requires a service as a one off service. Alumni and Advancement Services should:

- Provide the customer with a written confirmation of the date the service will be provided.
- Provide the customer with details of any costs that may be incurred.

## 2.4 Telephone Contact

When using telephones Alumni and Advancement Services staff should, in general:

- Aim to answer phone calls within four rings
- Minimise the use of voice mail, and use it as a last resort
- If out of the location temporarily or on leave, redirect their phone
- Log or note calls as appropriate
- Forward on messages to appropriate staff for action

## 2.5 Written Communication

Written communication may be in the form of letters and other documents that are posted, faxed or emailed. When writing Alumni and Advancement Services staff should:

- Respond to any customer email correspondence within a maximum period of 48 hours
- Respond to any customer correspondence (letters) within a maximum period of ten working days
- Be sensitive to cultural factors and write accordingly
- Use clear and understandable terminology
- Avoid abbreviations and jargon
- Be accurate with information
- Use the appropriate corporate letterhead
- Date all correspondence
- Sign correspondence, detailing name and position
- Be mindful of any potential confidentiality issues when a fax or email arrives or is sent
- Ensure the necessary disclaimers are attached

## 3 Service Request Categories

Alumni and Advancement Services will act as the medium to communicate with alumni, facilitate alumni surveys or polls for authorised business purposes, facilitate and manage RMIT University fundraising campaigns and appeals, operational and relationship management of identified fundraising prospects/major gifts/donors, and run reports to support authorised and approved internal and/or external stakeholders and clients.

Service	Definition
Communications	Communications may be in the form of email, electronic newsletters, alumni website ( <a href="http://www.alumni.rimt.edu.au">www.alumni.rimt.edu.au</a> ), direct mail, and where relevant verbal.
Surveys/Polls	Internal and/or External surveys - these requests will be permitted if there is a business requirement to survey or poll alumni which has been signed off by the Manager, Alumni Relations and/or Assistant Director, Alumni and Advancement Services.
Fundraising Campaigns and Appeals	Direct communication with Alumni, prospects or industry organisations as part of a University fundraising Campaign/Appeal will be coordinated and approved through Alumni and Advancement Services. Pre and post campaign/appeal reports will be provided by Alumni and Advancement Services to Campaign/Appeal strategy/planning groups where required and subject to

	relevant approvals from Assistant Director, Alumni and Advancement Services.
Prospects/Major Gifts	Direct communication with identified University prospects or individual/organisational representatives concerned with donating a Major Gift to the University will be coordinated through Alumni and Advancement Services. Information concerning prospects/major gifts will only be provided to staff members following approval from Assistant Director, Alumni and Advancement Services.
Donors & Sponsors	Direct communication with donors/sponsors is in accordance with the relevant, signed Donor Agreement, Sponsorship Contract, and associated management plan accompanying each agreement/contract. Approval prior to contacting donors/sponsors must first be sought from the identified 'Client Relationship Manager' within the University. Reports on donors/sponsor information will be provided to staff members following approval from Assistant Director, Alumni and Advancement Services.
Reports & Queries	Generating reports, address labels for direct mail collateral and/or statistic analysis of constituents in the Raiser's Edge. E.g. Annual Snapshot Report, Engagement Reports - relating to alumni, individual donors, prospects, campaigns, funds and appeals. Ad hoc queries on alumni, donors and/or companies.

## 4 Service Request Guidelines

Help us to help you by following the service request guidelines outlined below.

### 4.1 Communications

To assist Alumni and Advancement Services in meeting the alumni customer service commitment and ensure events, news and opportunities are published within the desired timeframes, requests for communications to alumni will need to: -

- Be submitted in writing to the Alumni Communications Coordinator with a completed **Alumni Request Form** available at [www.alumni@rmit.edu.au](http://www.alumni@rmit.edu.au).
- Comply with corporate brand guidelines.
- Be scheduled within the Alumni Communications Calendar.
- Meet submission timelines.

In order to effectively monitor the volume and frequency of communications and most importantly reduce risk of SPAM and number of unsubscribe requests from Alumni Community members, requests which do not meet submission timelines may not be actioned.

The Alumni and Advancement Services **Communications Calendar** and **submission timelines** are available online at [www.alumni@rmit.edu.au](http://www.alumni@rmit.edu.au).

#### 4.1.1 Email communication

- To reduce the number of emails to alumni, email messages will be incorporated in the monthly e-news as a matter of preference.
- Upon request statistics on bulk email release may be produced for internal clients within five working days.

#### 4.1.2 Electronic Newsletters

- Newsletters are scheduled in accordance with the Alumni and Advancement Services Communications Calendar.
- Newsletter guidelines and submission dates are found at [www.alumni.rmit.edu.au/NetCommunity/Page.aspx?pid=1272](http://www.alumni.rmit.edu.au/NetCommunity/Page.aspx?pid=1272) - Can this be changed to a friendly url??

- Requests to include an article in a newsletter must be made in writing in accordance with the submission date time lines.
- It is requested copy be kept to one or two paragraphs – items may be edited. Please provide web addresses for relevant web links.
- Where possible, alumni-related stories that cannot be included in *Alumni eNews* will be published elsewhere on the Alumni Relations website at [www.alumni.rmit.edu.au](http://www.alumni.rmit.edu.au) or may be used in other alumni publications.

#### 4.1.3 Direct Mail

- Due to privacy legislation and stringent regulatory controls alumni contact details or mailing lists will not be released to third parties. Alumni and Advancement Services may however produce address labels for internal clients who wish to conduct direct mail out for alumni related events.
- Based on the volume and frequency of requests for direct mail labels, the requesting party will be liable for costs associated with purchasing and/or printing of stationary. Associated fees will be quoted to the requesting party prior the service request being actioned.
- The requesting party is responsible for direct mail preparation and postage fees.

#### 4.2 Surveys and Polls

Alumni and Advancement Services currently support the University's obligation to participate in key government and industry related annual surveys of RMIT graduates, and will conduct a targeted online survey for alumni bi-annually.

In order to effectively monitor the volume and frequency of survey and poll requests and most importantly reduce risk and number of unsubscribe requests from Alumni Community members, *no more than two survey requests* will be sent to the same group of alumni per year.

Existing surveys consist of:-

- MBA and MBA (Executive) Graduate Survey, in February.
- Australian Financial Review Boss Survey, to MBA Graduates – Bi annually in April or May.
- Employer Survey – Conducted in May or June.
- Australian Graduation Survey also referred to as Graduation Destination Survey (GDS) conducted two times per year in April and October.
- Alumni Relations Survey – Bi annually.

#### 4.3 Fundraising Campaigns and Appeals

University Fundraising Campaigns and Appeals are undertaken in line with the University's Business Plan and strategic objectives. Approval to initiate a Fundraising Campaign is granted through University Council and enacted through the Vice-Chancellor's Executive. Approval for University Fundraising Appeals is granted through the Vice-Chancellor. Each Campaign and/or Appeal is dictated and directed by an individual Campaign/Appeal strategy and operational plan.

The role of Alumni and Advancement Services is to facilitate, mentor and project manage Campaigns and/or Appeals across the University, in accordance with the given strategy and operational plan. In all instances, Campaigns and/or Appeals require significant alumni, donor and staff support, and in most cases involve industry partners. The nature of the Campaign and/or Appeal will dictate the communication strategy adopted with alumni, donors, staff and industry partners. Communication with Campaign/Appeal stakeholders must be discussed with and approved by Assistant Director, Alumni and Advancement Services.

- All direct communication with alumni must first be approved by the Manager, Alumni Relations and/or Assistant Director, Alumni and Advancement Services.
- The University is committed to running an Annual Appeal. The 'ask' period for the Appeal is undertaken in May/June to coincide with the end of the financial tax year.

- The communication and operational needs of Campaigns and Appeals require a mix of communication and reporting tools targeted to Alumni. For this reason all communications to alumni require prior approval from Manager, Alumni Relations and/or Assistant Director, Alumni and Advancement Services.

#### 4.4 Prospects and Major Gifts

Fundraising prospects or potential major gifts identified by the University are managed through Director, Fundraising ~~Alumni and Advancement Services~~. Each prospect and proposed major gift opportunity is assigned a Client Relationship Manager, whose responsibility is to manage and facilitate communication with each prospect (or their nominated representative)/major gift opportunity, in accordance with the individual strategy devised.

Often the prospect/major gift opportunity process includes direct Vice-Chancellor/Senior Executive team involvement, and for this reason it is imperative that all communications, approaches or engagements with identified prospects are undertaken with prior approval from the Client Relationship Manager and/or Manager, Benefit Attraction and/or Assistant Director, Alumni and Advancement Services.

#### 4.5 Donors and Sponsors

All direct communication with individual Donors/Sponsors must first be approved by the designated 'Client Relationship Manager' for each donor. All communication and engagement with donors/sponsors must be in accordance with the individual, signed Donor Agreement/Sponsor Contract and Management Plan. Client Relationship Manager contact information can be accessed through Alumni and Advancement Services. Collective communication to donors must first be approved by the Manager, Benefit Attraction and/or Director Alumni and Advancement Services.

#### 4.6 Reports and Queries

Queries and reports relating to statistical information on alumni and donors may be produced as ad hoc queries, standard statistics or unsolicited reports generated by Alumni and Advancement Services as a matter of process, for internal authorised clients.

Please submit requests in writing via a *Request Form*, outlining the specific type of data or report required.

Delivery timeframes will vary depending on size and volume of query - It is advised a minimum of **four weeks notice** (or earlier if possible) for ad hoc requests be provided to facilitate scheduling and delivery of request.

##### 4.6.1 Unsolicited Generic Reports

A schedule of standard generic reports will be made available to internal stakeholders upon request as ongoing report parameters are constructed.

These include, but are not limited to the Annual Snapshot Report, Engagement Reports - relating to individual donors, prospects, campaigns, funds and appeals.

## 5 Glossary of Terms and Abbreviations

Authorised Party	An organisation or individual determined by a set of criteria based on their role in the organisation, where verified is permitted to request a service, view or is given access to data for the sole business purpose in line with the legal framework in place within the jurisdiction of RMIT University operations.
Prospect	A person identified by the University who has the potential to donate a significant gift (money, equipment, collection, estate etc) to the University.
Donor	A person(s) or organisation that has donated a gift to the University without receiving material benefit in return.