

UCSF Mobile App Communication Guidelines

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The CLS Digital Governance Committee may revise these guidelines periodically.
Any substantive changes will be shared with entities/partners.

I. UCSF Mobile App: History and Information

In 2014, Campus Life Services introduced a GPS-enabled mobile app to help guide the UCSF community to services and events. It served as a concierge of local content and multimedia for the campus's on-the-go community of staff, faculty, and students. In 2017, the app was redesigned and upgraded using an industry-leading platform from Modo Labs. The app was then re-launched as the official campus app with improved functions and features. Today, the UCSF Mobile App has been downloaded over 47,000 times. It provides real-time data integration for essential information (i.e. shuttle departures) and leverages proximity of useful information in a single app environment for UCSF.

Effective use of mobile media is becoming increasingly important to today's communicators. The UCSF App is positioned to pilot new features and functionality, including enhanced communication options (i.e. interest-based opt-in channels), personalization options, and advanced analytics. Incremental addition of high-demand features will increase the value of the app and its adoption.

In 2019, CLS Tech conducted a roadshow and stakeholder interviews to groups throughout UCSF, including the Deans offices, Office of the Registrar, student and trainee offices, and the offices of other campus leaders to learn about demand for app functionality. From those interviews, CLS Tech identified key projects to grow, develop, and centrally manage the app. Mobile app pilot projects are underway today to increase the value and effectiveness of the app, and to provide necessary experience with app functions and features.

II. Governance

The CLS Digital Governance Committee, co-led by the UCSF IT - CLS Tech Digital Solutions Manager and the CLS Communications Director, manages the policies and procedures to maintain and manage CLS websites, UCSF Mobile App, and other digital collateral. Its goal is to facilitate a user experience that develops a lasting digital relationship with all visitors, providing them with the information they need quickly, easily and enjoyably while supporting the University's mission.

The Committee meets monthly.

III. Communication and the UCSF Mobile App

Sending information to the campus community using mobile-specific communication channels can be vital in sharing resources, services, event information, and more. UCSF IT- CLS Tech and CLS Marketing & Communications (CLS Marketing) supports three communication options for UCSF entities looking to expand their communication channels to users of the UCSF Mobile App.

Managed by CLS Tech and CLS Marketing

1. Public Notifications/Messages (Push Notifications/Messages)

Public notifications and messages can be sent to all users or a specific app experience that have enabled push notifications for UCSF Mobile.

2. In-App Banners/Messages

In-app banners and messages create notifications inside the UCSF Mobile App at the top of the main homepage or specific module pages.

Managed by an approved UCSF Entity/Partner

3. Opt-In Channel Notifications/Messages

Opt-in channels are a feature of the UCSF Mobile App that enables UCSF entities and partners to send messages manually, scheduled, or linked to an RSS feed to a specific messaging channel in the UCSF Mobile app.

IV. Policies & Guidelines and User Agreement

1. UCSF/UCOP/CLS Tech Policies and Guidelines

Using the UCSF Mobile App communication platform is a privilege, and its usage is subject to the guidelines and policies of UCSF, UCOP, and UCSF IT - CLS Tech. Specific UCSF and UCOP guidelines and policies include:

- [UCSF Code of Conduct](#)
- [UCSF Pride Values](#)
- [Health Insurance Portability and Accountability Act \(HIPAA Business Associates Policy No. 200-28\)](#)
- [UCSF Brand Identity Guidelines](#)
- [UCOP Electronic Communications Policy](#)
- [UCOP Use of Name Policy No. PACAOS-Appendix-B](#)

An approved **User Agreement** between CLS Digital Governance Committee and the UCSF Organization is required to post to or use the platform. Additionally, UCSF IT - CLS Tech and CLS Marketing will provide training on how to use the platform, explain usage expectations, and share Best Practices to support an effective and active communication tool.

2. User Agreement and Approval/Renewal Process

The purpose of the **User Agreement** is to ensure that users understand and follow the guidelines, policies and processes governing the Mobile App and that CLS Digital Governance Committee has oversight to ensure compliance, access and basic usage standards.

Components of the **User Agreement** include:

- Guidelines and Supporting Policies
- Platform(s) selected (Public postings and/or Opt-In channel)
- Usage expectations such as user count and content updates for Opt-In channel
- UCSF Group and UCSF/Department affiliation with contact information
- Signature of Organization Executive Sponsor/Leader
- Signature of Communications contact
- Date of agreement

See last page for UCSF Mobile App User Agreement

The CLS Digital Governance Committee will review and approve the **User Agreement** for a 12-month period.

Annually, CLS Marketing will review activity on the platform and, if found to have met expectations, will recommend renewal to CLS Governance Committee.

If a **User Agreement** is not approved or renewed, the UCSF organization may appeal the decision by requesting time at the next Digital Governance Committee meeting.

V. Posting to the UCSF Mobile App: Public and Opt-in Channels

1. **Public Channels: Public Notifications/Messages and In-App Banners/Messages** CLS Marketing & Communications manages both the UCSF Public Notifications/Messages and In-App Banners/Notifications postings.

Posting Process

UCSF organizations may request a Public Notification or In-App Banner posting by submitting The [UCSF Mobile App Notification Reservation Form](#) within 14 days of desired posting date. CLS Marketing will partner to determine appropriate delivery method and timing.

The Reservation Form can be found at:

<https://form.asana.com/?k=uD653Z5w6WMNXr7HtmRBUQ&d=941465331525662>

CLS Marketing manages the posting schedule and may reschedule postings when there is a need for emergent notices with broad impact to the UCSF community, operations or safety. (ex: Traffic alert due to construction or a community event or message from Chancellor).

Types of messages appropriate for Public Notifications/In App banners:

- Events that will impact campus operations – Calls to Action that contribute to UCSF mission
 - shuttles, construction impacts, Game Days, strike information, etc.
 - calls to action that are time sensitive
- Messages from UCOP and UCSF which impact the larger campus community
 - State of the University Address, UC Votes, etc – broad messages!

Public notifications will include an attribute from the requesting UCSF department> Ex: *Posted at the request of UCSF Government Relations*

It is not appropriate to post emergencies, Warn Me messages, transactional promotions, advertisements, evergreen material, and department/unit specific notices on the Public Notifications/In App banners channels. These are more appropriate on an Opt-In channel.

A Scoring Matrix will be developed to provide guidance if Public Notification requests need to be prioritized.

2. Opt-In Channel

With an approved **User Agreement** and training, the UCSF Organization is empowered to manage their Opt-In channel and is allowed to post without coordinating postings through CLS Marketing.

CLS Marketing reserves the right to remove postings on any Opt-In Channel for non-adherence to the Policies and Guidelines stated to and agreed upon in the **User Agreement**.

Annually, CLS Marketing will review activity on the Organization's channel and advise on components such as frequency of updates, user threshold and other Best Practices of an effective and active communication tool. Organizations meeting established expectations will be recommended to the CLS Governance Committee for **User Agreement** renewal.

VI. Expectations of Opt-in Channel Usage

1. Training

UCSF IT - CLS Tech and CLS Marketing teams will provide training on how to manage the Opt-In Channel platform, including explaining usage expectations such as frequency of updates, user thresholds and other components of an effective and active communication tool.

2. Content Frequencies

Outside of a specific event or function that is approved beforehand, an Opt-in channel is expected to post content at least once every four weeks. After four weeks, the Organization will be issued a warning, if content in the channel is not updated within the following four (4) weeks, the channel will be under consideration for removal.

3. User Thresholds

A user threshold of **at least 50 users** after the first three (3) months is the expectation. After 3 months, the Organization not reaching this threshold will begin formal monitoring. If the channel is not above this threshold after 6 months, the channel will be under consideration for removal.

4. Annual Monitoring

Each year, UCSF IT - CLS Tech and CLS Marketing will review activity on the Organization's channel and advise on components such as adherence to established policies and guidelines, frequency of updates, user threshold, and other Best Practices of an effective and active communication tool.

Organizations meeting established expectations will be recommended to the CLS Governance Committee for **User Agreement** renewal.

VII. Disclaimers

The CLS Digital Governance Committee may revise these guidelines periodically. Any substantive changes will be shared with entities/partners.

UCSF IT - CLS Tech/CLS Marketing reserves the right to remove postings on any Opt-In Channel for non-adherence to the Policies and Guidelines stated and agreed to in the User Agreement.

The CLS Governance Committee maintains the decision to cancel a User Agreement for a UCSF organization with repeat violations of established Policies and Guidelines thereby revoking the privilege to post on UCSF Mobile App.

VIII. Addendum

Mobile App Communication Options, Definitions with Visuals.
For any questions, please contact CLSTech@ucsf.edu.

PUBLIC NOTIFICATIONS & MESSAGES (Push)

Public notifications and messages can be sent to all users or a specific app experience that have enabled push notifications for UCSF Mobile. These notifications are generally reserved for app updates and features, and campus-wide events. On rare occasions, public notifications can be sent by CLS Marketing on the behalf of an UCSF entity with prior approval.

Public Notifications & Messages Example

Staff Resource Days is one of the largest UCSF events, affecting all app users. Updates and notices about the event are sent to app users via push notifications.

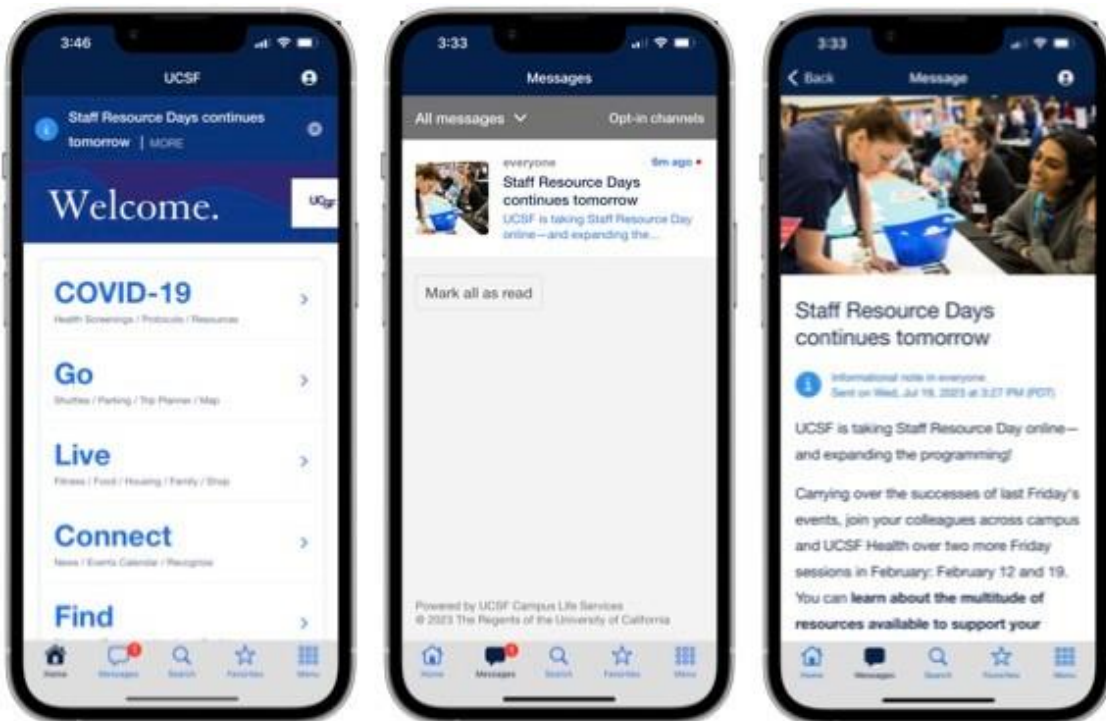


IN-APP BANNERS & MESSAGES

In-app banners and messages create notifications inside the UCSF Mobile app at the top of the main homepage or specific module pages. These are a good alternative to public notifications because all users will see these banners within the app but will not receive a push notification. These banners are generally used for app updates and features, maintenance, events, and survey opportunities. The banners and messages can be sent by CLS Marketing on the behalf of an UCSF entity with prior approval.

In-App Banner Example

The in-app banner at the top of the screen alerts users to Staff Resource Days on the UCSF Mobile app. Tapping the banner would direct users to the full notification message.

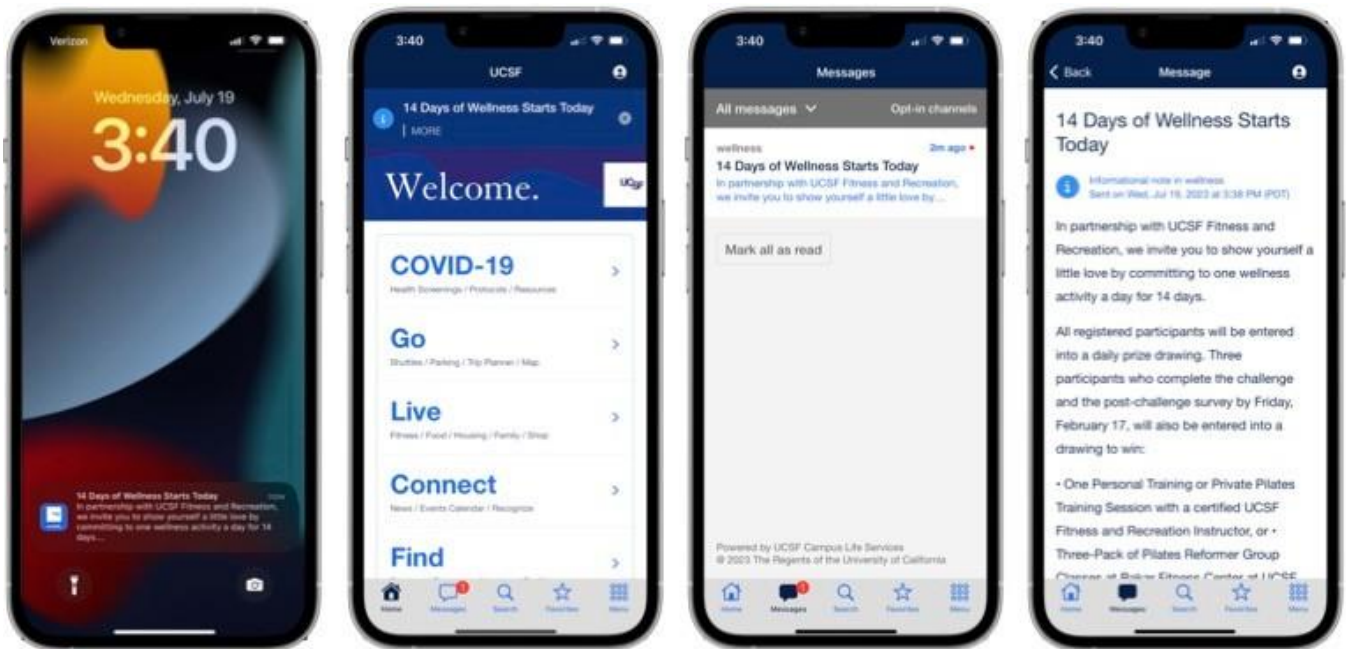


OPT-IN NOTIFICATIONS

Opt-in channels are a feature of the UCSF Mobile app that enables UCSF entities and partners to send messages manually, scheduled, or linked to an RSS feed to a specific messaging channel in the UCSF Mobile app. These channels send a push notification to subscribed users and allow all users to read information from specific messaging channels in the UCSF Mobile app.

Opt-In Notification Example

The 14 Days of Wellness notification displayed here is an example of an opt-in notification. Only users subscribed to Wellness—the channel that distributed this message—will receive a push notification for this message.



Opt-In Communication FAQs

What are opt-in channels?

Opt-in channels are a feature of the UCSF Mobile app that enables UCSF entities and partners to send messages (manually, scheduled, or linked to an RSS feed) to a specific messaging channel in the UCSF Mobile app. These channels allow all users to read information from specific messaging channels in the UCSF Mobile app.

What are opt-in messages?

Opt-in messages are delivered to specific opt-in channels in the UCSF Mobile app and can be read by all users. The UCSF entity or partner can include a title, description, category, delivery method, and links to content from within a message.

Do users need to opt-in to read messages?

All users of the UCSF Mobile app can opt-in to any opt-in channel within the app. There is no authentication required to opt-in or read any messages in these channels. A user can opt-in to receive push notifications to their device when new messages are available in a channel. If the user does not opt-in to a channel, they will not receive a push notification, but can still read the message in the message center in the app.

What are opt-in notifications?

Opt-in notifications allow users of the UCSF Mobile app to opt-in to specific messaging channels and get push notifications when new messages are posted to these channels in the UCSF Mobile app.

What is Modo Communicate?

Modo Communicate is the platform UCSF entities and partners will use to create, approve, and send messages to a specific messaging channel or app persona in the UCSF Mobile app. Each user requires their own unique account to Modo Communicate.

UCSF Mobile App User Agreement

UCSF Mobile app is administered by UCSF IT - CLS Tech and CLS Marketing. This agreement governs Public Notifications/Messaging and Opt-In Channel postings.

Guidelines and Policies

Usage of UCSF Mobile app communication portals is a privilege and is subject to the guidelines and policies of UCSF, UCOP and UCSF IT - CLS Tech. UCSF IT - CLS Tech and UCSF Office of Communications reserve the right to update or make exceptions to these guidelines, and updates will be communicated to Users. Specific UCSF and UCOP guidelines and policies include:

- [UCSF Code of Conduct](#)
- [UCSF Pride Values](#)
- [Health Insurance Portability and Accountability Act \(HIPAA Business Associates Policy No. 200-28\)](#)
- [UCSF Brand Identity Guidelines](#)
- [UCOP Electronic Communications Policy](#)
- [UCOP Use of Name Policy No. PACAOS-Appendix-B](#)
- [UCSF Mobile App Communication Guidelines](#)

Scheduling of Public Notifications/Messages and In-App Banners/Messages

CLS Marketing approves and manages the posting of all Public Notifications/Messages and In-App Banners/Messages. CLS Marketing will work directly with the UCSF Organization to coordinate scheduling and may decline postings due to scheduling conflicts.

Monitoring of Opt-in Channel Content

Although managed by each Organization, CLS Marketing reserves the right to remove postings to Opt-In channels if established policies and guidelines are not followed. CLS Marketing will partner with Users to annually monitor and advise on frequency of updates, user thresholds and other components of an effective and active communication tool.

By signing this agreement, _____ is agreeing to the conditions of this User Agreement, and the Executive Sponsor and Communications Contact assures the content reflects established guidelines, policies, and expectations as monitored by CLS Marketing.

UCSF Organization: _____

Organization's Executive Sponsor/Leader: _____

Communications Contact: _____

Date Signed: _____