

DEEP: Privacy & Preference Center Communications Plan

SPRING 2025

1.0 Background

Data serves a critical role in successfully running our operation, determining our strategy, and fulfilling our goals. The needs of our constituents (i.e. alumni, donors and friends) are changing and require the OSU Foundation (OSUF), which includes the OSU Alumni Association (OSUAA) and Our Beaver Nation (OBN), to evolve with these changes. These changes include the ability to (1) deliver on personalization and preference, (2) ensure we're engaging with the right people at the right time, (3) complying with new privacy regulations and being good stewards of our constituent's data, and (4) building sustainable donor and volunteer pipelines. To meet these new demands and successfully achieve our strategic goals, the OSUF launched the Data Ecosystem Enhancement Project (DEEP) to evolve our technology infrastructure, redesign and reimagine antiquated or cumbersome processes, and upskill and develop our employees' skillsets. DEEP will future proof our organization for the next decade, ensuring the best experience for our constituents and maintaining an innovative yet fiscally responsible approach to technology spend in support of OSUF's strategic plan. The three deliverables for DEEP are to build:

1. A **privacy & preference center**, providing power to our constituency to control what they receive and meet regulatory requirements.
2. A **modern, scalable data warehouse**, providing OSUF with the scalability to grow with our data.
3. **Data automation pipelines**, providing OSUF with improved data automation and process efficiency that will increase staff efficiency, capacity, and augmenting our work.

This communication plan focuses specifically on the launch of a new web-based privacy & preference center for OSUF and its constituents.

2.0 Objective

The objective of this communications plan is two-fold. First, we aim to prepare and educate OSUF staff prior to the public launch of the center to ensure all key staff are aware of the change and can support OSUF constituents in its use once the center is publicly launched. Second, we aim to strengthen trust with OSUF's constituents (alumni, donors, etc.) by demonstrating the value we place on their data, privacy and communication preferences. The DEEP Project Team aims to help stakeholders and constituents understand the change by communicating the vision and motivation behind this effort. Messaging will be used to highlight the benefits this change will bring to OSUF and its constituents and tie the change into a common, relatable thread.

3.0 Benefits

- **Strengthened trust with our constituents.** OSUF values the personal data of our constituents, providing them with easy access to the OSUF privacy policy and the ability to update their communication preferences simply and securely.
- **Personalized communications.** Constituents will have the ability to control what content they want to opt-in/opt-out of, as well as how they want to receive the content (e.g. email, postal mail, etc.).
- **Privacy law compliance.** OSUF will be compliant with the OCPA and other privacy laws by giving consumers to ability to (1) obtain confirmation that OSUF has processed their personal data, (2) obtain a report of the personal data OSUF has processed, (3) correct inaccuracies in their personal data, and (4) upon request, delete their personal data.
- **Reduced risk of monetary penalties for non-compliance.** The penalty for non-compliance with the OCPA is up to \$7,500 for each violation. By complying with the OCPA, as well as other consumer privacy laws, OSUF is avoid the risk of being assessed monetary penalties.
- **A unified web experience.** Constituents will use a single login to access services provided in the donor & alumni experience portal as well as the services provided in the privacy & preference center.

4.0 Challenges

The privacy & preference center will be a novel experience for our organization and our constituents; as such, the challenges stem from the change management needed in adopting a new service, including:

- Adoption of the new service.
- Adoption of the new processes associated with the service and letting go of the former processes.
- Constituents being challenged to navigate the new center.
- *Technical challenges:*
 - All processes, including data deletion request, communication preference opt-in/outs, and personal information updates, need to be planned for and tested in advance of launch.

5.0 Key Messages

Most of our key messages are universal, though a few are dedicated to our internal OSUF staff as we prepare for the public launch.

5.1 Key Messages for All Audiences

1. **OSUF values the personal data of our constituents.** Our value in our constituent's data is reflected in our investment in an updated privacy policy and the development of this privacy & preference center.
2. **Simple and secure access to personal information.** A single, unified web-based center simplifies access to donation history, setting communications preferences, managing personal information, requesting a report on personal data that's been processed, and requesting removal of personal data. Authentication will be required to secure access to the information and controls.
3. **Ability to personalize communication preferences for OSUF content.** OSUF wants to understand how our constituents want to engage with us. The center empowers constituents by giving them control over the channels (e.g. email, direct mail, phone, text) they want to receive OSUF content, and what types of content they want to receive from OSUF.
4. **Compliance with the OCPA and other privacy laws.** The center will ensure OSUF is compliant with the OCPA and other privacy laws, promoting security of our constituent's data, honoring their preferences, and avoiding the risk of paying monetary non-compliance penalties.
5. **Shifting the perception of privacy and preferences.** Privacy and preference options are not limitations but advantages. By respecting consumer privacy, OSUF creates a more targeted, personalized and relevant communication strategy.

5.2 Key Messages for OSUF Staff and Board of Trustees

1. **Internal "soft" launch for OSUF staff in April.** An internal-only pre-launch will help educate OSUF staff about the change in advance of a public launch.
2. **We will educate OSUF staff and its constituents** about the benefits as well as changes to internal processes that support privacy law compliance and honoring constituent preferences.
3. **Public launch for OSUF constituents by July 1.** The center's public launch for all OSUF constituents will occur by July 1, 2025 (the deadline for OCPA compliance for non-profit organizations, including OSUF).

6.0 Elevator Pitch

We have two (2) elevator pitches, #1 is for OSUF staff and our boards, and #2 is for OSUF constituents:

1. "We are excited to introduce the new web-based Privacy & Preference Center, part of the DEEP initiative and a new feature of our Donor & Alumni Experience Portal. This platform empowers our

constituents by giving them control over their personal data and communication preferences, enhancing their experience and ensuring compliance with privacy laws like the OCPA. It reflects our commitment to being trustworthy stewards of their data and future-proofing our organization."

2. "We are excited to introduce the new web-based Privacy & Preference Center, a new feature of the OSU Foundation's Donor & Alumni Experience Portal. This platform empowers you by giving you control over your personal data and communication preferences. It enhances your experience, ensures compliance with privacy laws, and reflects our commitment to being trustworthy stewards of your data."

7.0 Expected Outcomes

- Increased constituent engagement with communications that are more personalized and targeted.
- Greater satisfaction by constituents as they gain control over the content they receive and how they receive it.
- Compliance with OCPA and other privacy laws, coupled with improved constituent trust in OSUF.

8.0 Audience & Stakeholders

We need to engage with these groups to ensure a successful outcome:

- OSUF: general staff – general awareness and education
- OSUF: SLT – general awareness, education and strategy
 - All-staff (via special sessions and/or all-staff meetings)
- OSUF: Development officers – awareness and education of new subscription category framework labels in CRM
- OSUF: Board of Trustees and External Relations Committee (ERC)
- OSUF: OSUAA Board of Directors (TBD)
- OSUF constituents – general promotion and awareness
- OSU: UIT – general promotion and awareness.
- OSU: campus partners (TBD) – general promotion and awareness

9.0 Timeline

The timeline covers (1) an internal awareness campaign, (2) planning and implementing a beta test, (3) pre-launch final preparations, and (4) an external awareness campaign.

The strategic focus for an internal awareness campaign with OSUF staff and our boards will be on:

- The new center is the first of three key deliverables of DEEP.
- The new center positions OSUF as a privacy-forward organization, building trust with our constituents.
- The new center doesn't limit but rather leverages constituent preferences to create a meaningful and personalized engagement strategy that aligns with strategic fundraising goals.
- The new center supports OSUF's compliance with the OCPA and other data consumer privacy laws.
- Our value in our constituent's data is reflected in our investment in an updated privacy policy and the development of this center.

9.1 Timeline Overview

- *March 2025:*
 - Complete communications plan

- Internal test site launch
- Completion of updated OSUF privacy policy
- *April-May 2025:*
 - Begin and run internal awareness campaign activities
 - Conduct UI beta testing of test site
 - Preparing external awareness campaign for public launch
- *June 2025:*
 - Public launch of the privacy & preference center
 - Begin external awareness campaign activities
- *July 2025 & beyond:*
 - Continue promoting the center as needed

9.2 Week-by-week Timeline [Items subject to change]

Items in **blue** relate to UI beta testing. Items in **orange** are meetings to attend as part of the internal awareness campaign.

- *Week of March 17: Comms planning*
 - Communications planning work
- *Week of March 24: Comms planning (* spring break *)*
 - Complete the communications plan
- *Week of March 31: Internal awareness prep & beta test prep*
 - Internal launch of the privacy & preference center test site
 - Preparing for UI beta test activity (i.e. recruit volunteer testers, prep work, etc.)
 - Staff update: OSUAA All-staff (4/2)
 - Planning/storyboard for privacy & preference center tour video
- *Week of April 7: Internal awareness start & beta test kick-off*
 - Preparing for UI beta test activity (i.e. recruit volunteer testers, prep work, etc.); Recruit from:
 - OSUF BoT: External Relations Committee
 - OSUF staff
 - OSUAA BoD (TBD)
 - Beta testing: Schedule 15-min testing sessions with individual testers
 - Prep & record privacy & preference center tour video
 - Test privacy & preference center tour video
- *Week of April 14: Internal awareness (cont.)*
 - Staff update: All-DO meeting (4/15)
 - Staff update: MarComm meeting (4/15)
 - Conduct beta testing sessions (cont.)
 - Post and promote privacy & preference center tour video to DEEP website, etc.
 - Possible DO/DXO privacy & preference center training video?
- *Weeks of April 21-28: Internal awareness (cont.) and beta test (cont.)*
 - OSUAA Board of Directors (Apr. 24, 25)
 - Staff update: SLT meeting (Apr. 28)
 - Summarize beta test feedback and review with Fundmetric
 - Promote privacy & preference center tour video
- *Week of May 5: Internal awareness (cont.) and beta test (cont.)*
 - Board meeting (May 7, 8) – ERC, OBN, OSUAA boards? (Fundmetric will be on-site)
 - Raise awareness with OSU UIT CIO (Mark)

- Fundmetric: Apply & validate final changes
 - Beta test group feedback
 - *Week of May 12: External awareness prep*
 - Prepare external awareness messaging
 - *Weeks of May 19 and 26: External awareness prep*
 - Prepare external awareness messaging
 - Internal staff check-in: ensure support teams are prepared for inquiries.
 - *Week of June 2: Public launch & mass announcement*
 - Public launch of the privacy & preference center
 - Start external awareness messaging (TBD):
 - Existing digital newsletters
 - One standalone email sent to constituents
 - Direct mail
 - *Week of June 9: Engagement & Education*
 - Ongoing promotion: Integrate reminders in newsletters, etc.
 - *Following weeks:*
 - Assess engagement metrics and refine outreach strategies.
 - Consider targeting new constituents added to CRM after the initial launch.
 - Support update: Address common issues and refine support materials
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