Navigate Staff Messaging Guidelines

Purpose & Expected Outcomes of These Guidelines

Purpose

- Provide clear, consistent standards for using Navigate Staff messaging.
- Ensure student communication is strategic, coordinated, and student-centered.
- Prevent message overload so students remain engaged with important university information.

Expected Outcomes

- Students receive the right information at the right time.
- Messages are clear, targeted, and actionable.
- Reduced message fatigue through limited, consolidated, and coordinated outreach.
- Higher student response rates and improved follow-through on required actions.
- Stronger support for academic progress, financial aid, enrollment, and graduation.
- Improved student persistence and retention, contributing to overall success at EWU.

Why These Guidelines Matter

Students have expressed that they receive too many emails and often struggle to determine which messages are important, which require action, and which can be ignored. As a result, many are tuning out university communications altogether.

While students often respond more readily to texts than emails, all messaging—whether by email or text—must remain strategic, purposeful, and limited to essential information. These guidelines are designed to help faculty and staff use Navigate Staff messaging in a coordinated, student-centered way that improves engagement and retention without overwhelming students.

Note: *Reducing Navigate Staff messaging must not result in an increase in direct messaging through Outlook, Slate, or other platforms.*

Guidelines for Navigate Staff Messaging

Navigate Staff messaging should be used as a student retention tool for current or returning students rather than a recruitment tool for EWU, academic departments, or individual courses.

Definitions:

- ***Navigate Staff*** refers to the staff-facing student success management tool used by staff, faculty, and other EWU employees.
- This differs from ***Navigate Student*****,** which is a student-facing mobile application that provides timely and relevant information that keeps students organized and on-track for graduation.
- ***Message*** refers to any email or text sent through Navigate Staff.

General Messaging Guidelines:

- Messages should never be sent to the entire EWU student population.
- Keep messages short, relevant, and sent only during business hours.
- Messages should be sent as either a text or an email, but not both.
- Limit messaging frequency on the same topic to one per week.
    - Bundle content into weekly summary emails when possible - do not send daily messages.
    - *Exception: This does not include individualized or one-on-one conversations with students.*
- Do not use Navigate Staff for messaging about social or extracurricular activities—these should be posted in Navigate Student (contact navigate@ewu.edu for assistance).
- Check messaging history to ensure that subject matter has not recently been addressed.
- Never send any messages containing social security numbers, passwords, credit card numbers. Do not text any FERPA-protected data (sometimes the cell phone on file is a parent).

Content Requirements:

- Only use Navigate Staff messaging for essential information that directly affects a student's:
    - Academic progress
    - Financial aid
    - Graduation
    - Enrollment or student status
- All messages should be:
    - Clear and concise: Students should immediately understand why they're receiving the message.
    - Targeted: Messages must be relevant to the recipient group.
    - Actionable: Include next steps, deadlines, and contact information.

Email Example:

Subject: Action Needed: Submit Your FAFSA by April 1

Message Body:
Hello {$recipient_first_name},
Our records show you haven't yet submitted your 2025–26 FAFSA. Submitting your FAFSA by April 1 ensures you're considered for the maximum amount of financial aid.
Next Step: Complete your FAFSA online at FAFSA.gov.

If you have questions or need help, contact the Financial Aid Office at finaid@ewu.edu or 509-359-2314.
Thank you,
{$email_signature}

Text Example:

Hello, my name is [First Name] with EWU Financial Aid. Our records show you haven't submitted your 2025–26 FAFSA. Submit by April 1 at fafsa.gov to maximize aid. Questions? Call 509-359-2314.

- Avoid sending non-automated reminders or follow-ups. Instead, send one complete message with all necessary information.
    - *Exception: Follow-up messages are permitted when using Navigate's "Campaign" feature.*
    - If a reminder is necessary (e.g., deadline approaching), clearly differentiate it as a reminder.

Emailing:

- Follow all *General Messaging Guidelines* and *Content Requirements* listed above.
- May include personal/sensitive information such as GPA, Academic Standing, or other information from a student's educational record protected by FERPA.
- Paste the following into messages and message templates to ensure message uniformity:
    - Hello {$recipient_first_name}
    - {$email_signature}

Texting:

- Follow all *General Messaging Guidelines* and *Content Requirements* listed above.
- Always identify yourself and your role at EWU when initiating text communications, as this is not readily apparent.
- Text messages are limited to 300 characters.
- ***Never*** include personal/sensitive information such as GPA, Academic Standing, or other information from a student's educational record protected by FERPA.
    - Sometimes parent's phone numbers are listed under the cell phone for students, which is why it is critical to avoid including sensitive, FERPA protected information in text messages.
- A text message sent to fewer than 100 students comes from a randomly generated 10-digit phone number.
- A text message sent to 100 or more students comes from EWU's bulk messaging number.
    - The bulk messaging number cannot accept replies.
    - Students can opt-out by replying with STOP, QUIT, CANCEL, UNSUBSCRIBE, END.

Departmental and/or Unit Communications

To streamline communication and reduce message fatigue, each department or unit should:

- Develop an internal communication plan for student outreach.
- Differentiate "must-have" from "nice-to-have" messages, prioritizing essential content.
- Ensure messaging coordination across all departmental staff to avoid duplication or timing conflicts.
    - Designate one staff member or a small team to oversee student messaging for the department.
    - Maintain a departmental calendar or log of planned student messages.
- Consolidate messages when appropriate to minimize volume.
- Use Navigate "Campaign" messaging sparingly and strategically.
    - **Navigate Staff Appointment Campaign:** for use when the action you want the student to take is to make an appointment with you via Navigate.
    - **Link to Messaging Campaign tutorial:** for use when the action you want the student to take is to ingest information. No direct action (click link, fill out form, register for classes, etc.) is required of the student.
- **Send messages only within your unit's core area of responsibility.** For example, Financial Aid should not send messages about PLUS services, and CAAR should not send messages about Bursar payment plans. Messages about processes or institutional policies should be coordinated and/or approved through the most appropriate unit.
- **Establish internal message approval processes.** Units are encouraged to develop their own approval structure in addition to their communication plan (e.g., who approves messages before they are sent).
    - These internal approval processes should also be shared with the Degree Completion Team (navigate@ewu.edu) to support coordination and transparency across units.

Tone:

- Use plain language and a conversational, encouraging tone. Assume students may be reading quickly on mobile devices.
- Avoid acronyms without explanation.
- All messages should be:
    - **Supportive:** Use encouraging and empathetic language that motivates students and reduces barriers. Focus on helping, not scolding.
        - ***Example:*** *"We want to make sure you have what you need to stay on track."*
    - **Professional:** Maintain a respectful, concise, and polished tone. Avoid slang, excessive abbreviations, or casual phrasing that might cause confusion or appear unprofessional.
        - ***Example:*** *"Registration for summer and fall courses opens March 25 at 8 AM. You can register through EagleNET or contact Records & Registration if you need help."*
    - **Student-centered:** Frame messages around the student's perspective and needs. Communicate how the information affects them directly and what they should do next.
        - ***Example:*** *Instead of "The department requires this," say "To stay enrolled in your course, you'll need to…"*

    - **Culturally responsive and non-discriminatory:** Use inclusive, plain language that respects the individual needs of EWU students. Avoid assumptions about background, identity, or circumstances. Provide resources that are accessible to all.
        - ***Example:*** *Use "students and families" instead of "parents," or use "financial aid office" instead of acronyms like "FAO."*
- Messages must be consistent with EWU communications policies:
    - https://inside.ewu.edu/policies/knowledge-base/ewu-203-06-contact-information-electronic-mail-and-texting/

Conclusion:

These guidelines are not exhaustive, but they establish the minimum expectations for student messaging. They should be treated as a foundation for clear, coordinated communication. Staff are expected to apply these principles consistently and thoughtfully in all communications with students.

By following these guidelines, we can maintain effective and meaningful communication with students while respecting their time and engagement. By streamlining communication, we ensure students receive the right information at the right time, improving response rates, reducing confusion, and ultimately supporting persistence and graduation. Thank you for all you do to support student success at EWU.

Ongoing Support

Adapting to new communication guidelines may require practice and adjustment. For faculty and staff who need additional help, the Degree Completion Team will provide training, resources, and guidance to strengthen confidence in using Navigate Staff effectively. Our goal is to build consistency and clarity across communications while ensuring everyone has the support they need to be successful in this work. Please email navigate@ewu.edu for more information.