RCLS E-Mail Best Practices

E-mails sent from your e-mail account represent your Library. They need to be as professionally written and presented as any communications sent out on your Library's letterhead. The following guidelines are presented to help you ensure that your e-mails meet the highest professional standards.

Before crafting and sending an e-mail, think about the following:

- Is e-mail the best way to communicate this message?
- Would it be inappropriate if the wrong person received it?
- Is the e-mail being sent to the right person or people?
- Keep in mind that e-mail messages can be misinterpreted, especially when dealing with sensitive or emotional subjects.
- Before sending a "sensitive" e-mail, re-read it and consider getting a second opinion.
- Consider every e-mail you send as if it is on your Library's letterhead.
- Respect the privacy of others; keep in mind that e-mail is not private, as it is easily forwarded (accidentally or on purpose).
- Use the telephone if the topic has many of parameters that need to be explained or negotiated and will generate too many questions and confusion; don't handle it via e-mail.
- Always remember that e-mail correspondence lasts forever.
- "Reply All" should be used sparingly. Do not use "Reply All" unless you are sure you want everyone who received the original e-mail to get your reply, including those on the listserv from where the e-mail originated.
- When responding to a message from an individual to a listserv group, sharing information about an event, for example, the fact that the library's budget passed, respond directly to the individual not the list.
- Never assume a position of informality in your business e-mails, especially with people you do not know well.
- Do not e-mail when you are angry.
- Refrain from using e-mail to convey bad or devastating news, to fire a vendor, reprimand someone, to disparage other people, etc.
- Do not use e-mail for last minute cancellations of meetings, lunches or interviews.

Formal e-mails and to individuals outside your library

- Address your contact with the highest level of courtesy (e.g., Dear Ms. McKinley) until your contact indicates that less formal is appropriate.
- Have a salutation (e.g., Hello) and sign off (e.g., Sincerely,) in every e-mail, just as you would in any letter written on your library's letterhead.
- Do not use academic jargon and "institution-speak." Use words and terms your target audience is familiar with.

Using SmarterMail – how-to-videos videos are available at:
https://www.youtube.com/playlist?list=PL1IhfCgqQvsZBJMA8T_v07nst9_0FAUNP

If you use SmarterMail as the primary application to manage your e-mails, you should abide by the following guidelines:
1) In order to keep e-mails beyond the automatic deletion dates outlined in the _RCLS E-mail Account Usage Policy_, create folders to store those e-mails you would like to keep
   a) There is no limit for the number of folders that you can create
   b) Folders can be used to file e-mails by appropriate subject categories, making it easier to find specific e-mails when needed
2) If you are planning to add a photograph to your SmarterMail account you should use a photograph of yourself. Do not use a photograph of your pet or an avatar. If you are not comfortable posting a photograph of yourself, do not upload any image

Guidelines for e-mail subject field and body

Subject field:

- Always use the subject field. Do not leave it blank.
- Use a descriptive, specific subject line that accurately characterizes the e-mail content.
- Always capitalize the first word or use initial caps on all of the words.
- If the e-mail thread goes back and forth and changes direction, consider changing the subject field to reflect the new topic.

E-mail body:

- Make the first paragraph a single, well-written sentence that builds from or repeats the subject line. When people jump from one e-mail to the next, they may skip the subject line altogether.
- Keep messages clear and to the point; use formal conversational style. Write it like you say it. We tend to talk in short sentences, using short words. E-mails should read the same.
- If you are sending an attachment, identify the file type (Word, PDF, Excel, etc.) and briefly describe the contents, be sure to note if you are sending multiple attachments.
- If you are sending a URL, identify the website or briefly describe the subject of the web page.
- People are much more action-oriented when they are online. Clearly state what action you want them to take as a result of your e-mail. If you have multiple action items, number them.
- Use hard returns to create line breaks, making white space so your message has visual breaks.
- Do not use all capital letters for body text or subject lines.
- Do not use emoticons in professional e-mails. Use them only if you have a well-established relationship with someone.
- Do not use abbreviations unless they are already common to the English language, such as FYI and BTW.
- Check spelling and grammar. Proofread your messages.
- Do not use patterned backgrounds. They make your e-mail harder to read.

E-mail Format

- When initiating an e-mail, in the "To:" and "From:" fields, have your contacts' names and your name typed with proper capitalization and punctuation.
- When replying to e-mails, your reply should be the first item in the body of the e-mail. Do not place your reply below the original e-mail, requiring the recipient(s) to search for it.
- Be careful when responding or forwarding e-mails, edit your replies and add an explanation about why you are forwarding an e-mail. If you are replying to or forwarding an e-mail, make sure that the recipient(s) understand the context of your reply or understand what you want to bring to their attention in the forwarded e-mail.
- When responding to an e-mail, some parts of the original e-mail, including headers and signature files, which do not apply to your response can be removed to provide clarity to your statements.
- Use "Bcc:" when e-mailing a group of people who do not personally know each other. E-mail Addresses in the "To:" or "Cc:" fields are visible to others. This is a privacy issue. "Bcc:" is also a way to hide long recipient lists and make the message easier to read.
- Use "Cc:" when a couple or small group of people need to be kept informed on information. "Cc:" means FYI and no action is needed.
- Before sending an e-mail, double-check the recipient list and subject line. Make sure that any attachments are actually included.
- Do not flag your message as "High Priority." If it's urgent, use the telephone.
- Do not use the "Request a Read Receipt" feature unless you absolutely need it. This feature notifies senders when their messages have been opened. Recipients might feel that this is an invasion of their privacy.
- Use common file formats for e-mail attachments (DOC, JPG, GIF, PDF, TXT, and XLS). If you are sending a file from a Mac to a PC user, be sure to add the proper file extension so the recipient can open your file.
- Use standard e-mail signatures of no more than four to seven lines and include all of your contact information.

Using non-RCLS e-mail accounts

If you use a non-RCLS e-mail account it is recommended that you use a mail client like Thunderbird or Outlook to manage your e-mail addresses.

a) An e-mail client allows you to manage multiple e-mail addresses and keep the correspondence in each separate;
b) When configuring an e-mail client it is possible to setup each e-mail account with different parameters:
  (i) To check for new messages when you open the e-mail client;
  (ii) To only check for new e-mails when you choose to;
  (iii) To check for new messages periodically while the e-mail client is open
  (iv) To automatically download new messages;
  (v) To leave all messages on the originating server for a predetermined period or when you delete the message from the client;
  (vi) To delete e-mails from the originating server when you download them to the client.