



# MASS EMAIL SERVICE

POLICIES AND PROCEDURES

# ABOUT THIS RESOURCE

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This resource describes the policies and procedures for using the BACB mass email service after January 1, 2021. Potential applicants considering the use of the BACB mass email service should make note of upcoming implementation dates for revised policies and procedures. Please refer to the [Mass Email Service](#) web page for the most up-to-date information. New versions of this document will be published as needed.

*The BACB does not discriminate against any individual because of race, ethnicity, gender, age, creed, disability, religion, marital status, sexual orientation, or national origin. The BACB reserves the right to amend the policies and procedures outlined in this resource.*

Please reference the version number on the cover of this resource to identify which iteration of this resource is being viewed. For a complete list of updates included in this version of the Mass Email Service Policies and Procedures, please see [page 13](#).

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# OVERVIEW

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## Overview

The BACB mass email service allows behavior-analytic organizations to communicate with BACB certificants for commercial-use purposes, such as advertising job or continuing education opportunities. To use the mass email service, read the following policies and procedures and submit an application. If approved, the BACB will create and deliver the specified email on behalf of the requesting organization.

## How the Mass Email Service Works

The first step in using the BACB mass email service is to submit an application. Please read through the policies and procedures further in this resource and, when ready, visit the [Mass Email Service](#) web page and click the Mass Email Application button at the bottom of the page to be directed to the application form.

Once you submit an application, the BACB will review it and provide a determination within 3 standard business days (i.e., not including weekends, holidays, or BACB office closures).

**If your application is approved**, you will receive an approved determination and an invoice. You must pay the mass email service fee no later than 14 days after you have received the invoice. Once payment is received, the BACB will place your application in the mass-email queue and begin crafting your email (i.e., this typically takes 7 days). Once your mass email is complete, it will be scheduled for delivery on the requested date or another agreed-upon date if rescheduling is required.

**If your application is denied**, you will receive a denied determination and an explanation. Your application will then be closed. A denied application cannot be reopened or altered, but you may submit a new application.

## Important Considerations Before Applying

Before you begin, please review these important considerations:

- **Is the organization that you represent a part of the behavior-analytic community?**  
Any organization submitting an application undergoes review by the BACB's mass email team to ensure that the nature of the work the organization does relates to behavior analysis or the behavior-analytic community, and that the organization is in good standing.
- **Is your message relevant to behavior analysts?**  
All mass email content must relate to one of the 7 content types covered further on this page. The content must be timely, referring either to content or events within the last 6 months or to content or events coming within the next year.
- **Which certificants do you want to reach (location and certification level)?**  
Mass emails can be sent to certificants in any combination of the states or provinces within the United States and Canada, as well as to over 100 other nations. Please note that some locations may be ineligible as an audience if there are not enough certificants of your preferred certification type residing there. Further, mass emails can be sent to any combination of the BACB's certificants by their certification type: RBT, BCaBA, BCBA, and BCBA-D. Please note that some certification types may not be eligible as an audience for certain topics (e.g., RBTs cannot be sent employment emails).
- **When do you want to deliver the email?**  
The BACB requires time to review each Mass Email Application before issuing a determination. Further, the BACB does not start work on an approved application until proof of payment has been received, with timely payment being your responsibility. For this reason, the BACB highly recommends submitting your application at least 10 days before your intended date of delivery and as early as 30 days before if you are intending to send a survey or regulatory email.
- **Should you send a follow-up email?**  
All applications include an initial email. Follow-up emails can be requested in your application (for a 50% increase on your application fee) and, other than their subject lines and send dates, are identical in every way to the initial email.

# OVERVIEW

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Additional details about the mass email service:

- The mass email service is available solely at the discretion of the BACB. The BACB does not distribute certificant contact information under any circumstances.
- The mass email service is a pre-pay service. No work will be performed on an approved application until proof of payment is received.
- No applicant can send more than one email (follow-ups included) within a 7-day window. Applicants will be notified if a conflict occurs and offered alternative send-date options.
- The BACB is not responsible for longer-than-standard review or processing times caused by a lack of response from the applicant or edits/changes requested late during processing.
- The BACB will inform applicants of any concerns before an email's release, but the BACB is not responsible for engagement results of emails sent through its system.

## Important Notes About the BACB Mass Email Service

The BACB mass email service is not associated with the [Certificant Registry](#).

Use of the BACB Certificant Registry is subject to agreement and compliance with the BACB's [Terms of Use](#). The BACB Certificant Registry is available as a resource for consumers, employers, and licensing authorities to verify certification status. You must be at least 18 years old to use the BACB Certificant Registry and associated email contacts. The registry and associated email contacts may not be used for commercial purposes.

Prohibited uses of the BACB Certificant Registry include, but are not limited to:

- sale of products
- information about products
- information about educational or professional programs
- vulgar or harassing emails
- solicitation for employment
- creation of a mailing/emailing database

# APPLICATION PROCESS

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## Application Process

### Review Stage

Once a Mass Email Application is submitted, the BACB will review the application for approval or denial. All applications will be reviewed within 3 standard business days, in the order received.

The following factors are considered during the review process:

- The applying organization is behavior analytic in nature and in good standing.
- The applying organization does not have any additional unpaid and/or open applications.
- All necessary elements of the application are included and abide by the BACB Mass Email Service Policies and Procedures and Terms and Conditions.
- The content of the mass email aligns with the requested audience.

If questions or concerns arise during the review process that could impact the determination, the BACB will reach out to the applicant.

### Determination Stage

A determination of approval or denial will be issued when the review stage is completed (within 3 standard business days). The determination will appear in the applicant's BACB account, and a determination notice will be emailed to the applicant. If the applicant does not have a BACB account, one will be created for them, and log-in instructions will be included in the determination notice.

If for any reason the BACB cannot complete mass email reviews within the standard 3 business days, a notice will appear at the top of the Mass Email Services web page. The BACB may reach out to an applicant by email if a delay specific to their application occurs.

### Processing Stage

If an application has been approved and the attached invoice has been paid, the BACB will process the application within 7 days from the date of confirmed payment. All applications are processed in order of payment received.

Please note that the applicant is responsible for paying their application within 14 days of notification. If the invoice is not paid within that timeframe, or the applicant does not reach out to the BACB to provide a reason for delayed payment (i.e., payment coming via check), the application may be denied.

Processing includes:

- uploading the provided content to the mass-email software
- making all necessary alterations to maintain design and proper functionality
- providing the applicant with a test email for approval
- scheduling the mass email for delivery
- producing and scheduling a follow-up email (if requested)

All applications include a review during the processing stage. Once the BACB has finished building the email associated with an application, a test email will be sent to the applicant for review. The applicant will be able to provide notes and edits as needed before approving the email for delivery. Please note that the BACB is not responsible for delays in delivery caused by extensive changes or untimely response by the applicant during the review.

# MASS EMAIL FEES

## Mass Email Fees

### Standard Fee Description

The cost to use the BACB mass email service is based on two factors: the total number of certificants in the BACB Certificant Registry and the percentage of certificants who fall into the specifications of the application (e.g., content type, certification type, geographic location).

Applicants may use the following table for a rough estimate of mass email service fees, but more accurate estimates will appear in the application as it is filled out.

It is important to note that not all certificants have opted to receive mass emails. For example, if the Certificant Registry contains 120,000 certificants, the number of certificants who opted to receive mass emails may only be 90,000, and the number of certificants who opted to receive employment-related mass emails may only be 70,000. Certificants may also update their mass-email preferences without updating their BACB account, leading to further disparities. The BACB would like to emphasize that the “estimated audience size” is an estimate, and may not reflect the final audience of an applicant’s campaign.

### Follow-Up Fee Description

Applicants have the ability to request a follow-up email when they apply for a mass email. The standard cost to use the BACB’s mass email service does not include the follow-up email.

When a follow-up email is included in an application, a 50% supplemental fee is added to the standard fee. Follow-up emails only incur a 50% increase in fee because they are identical to the main email of the application in every way except subject line and delivery date. If you want to send a completely unique secondary email to follow a previous mass email, a second application will be necessary, and that second application will follow the standard fee breakdown.

### Fee Breakdown

Percentage of Total Audience	Standard Fee	Follow-Up Fee	Max Fee (Standard + Follow-Up)
90% – 100%	\$500	\$250	\$750
80% – 89%	\$450	\$225	\$675
70% – 79%	\$400	\$200	\$600
60% – 69%	\$350	\$175	\$525
50% – 59%	\$300	\$150	\$450
40% – 49%	\$250	\$125	\$375
30% – 39%	\$200	\$100	\$300
20% – 29%	\$150	\$75	\$225
10% – 19%	\$100	\$50	\$150
5% – 9%	\$50	\$25	\$75
2% – 5%	\$25	\$13	\$38
Less than 2%	\$10	\$5	\$15

# AUDIENCE REQUIREMENTS

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## Audience Requirements

There are 3 types of information that an applicant must provide to help the BACB determine their audience: content types, certification types, and geographic locations.

The BACB has access to certificant information beyond the 3 types available in the Mass Email Application, but that data is not accessible to the mass-email system and cannot be used by applicants to further pinpoint their audience. This rule is in place to protect certificant privacy and to ensure equality of reach across mass-email applicants. As a result, Mass Email Applications that request data beyond those stated here may be denied.

### Geographic Locations

Applicants are able to select any combination of states and provinces of the United States and Canada—as well as most other countries—as the audience for their mass email; however, it is important to note that some locations may not have any certificants that meet a requested certification type or content type.

In addition, the geographic location selected may affect the application determination or review process. For example, if an applicant requests that a mass email be sent in a language other than the primary language of the geographic location selected, the application may be denied.

### Content Types

There are 7 content types that a mass email may fit into. Applicants must select the content type that best suits their mass email (i.e., they cannot select more than 1). If an application includes content that does not align with the content type specified, it may be denied. Certain content types may elicit longer application review or processing times (please see the blue text below).

The available content types are as follows:

- **New University Program Announcements**

This content type applies to mass emails that advertise a new behavior-analytic university program.

- **BCBA and BCaBA Employment Opportunities**

This content type applies to mass emails that advertise employment opportunities for BCBA and BCaBA. **Employment-related mass emails directed at RBTs are not permitted.**

- **Academic Research Surveys**

This content type applies to mass emails that contain surveys for academic-research purposes. The survey must be considered scholarly and professional and have been approved by the appropriate research-committee (e.g., Institutional Review Board). The content will be reviewed by behavior analysts at the BACB and only sent out if the survey data will yield valuable and contemporary information for the field and for BACB certificants.

Other considerations include the current frequency of survey requests, the existence of similar or identical survey research (including whether the same survey is to be distributed via other means), the advice of legal counsel, and the best interests and reputation of the BACB. Please note: Distribution of the survey is discretionary and contingent on the BACB's review and the previously mentioned factors.

*Applicants submitting under this content type are requested to submit an Institutional Review Board (IRB) letter, a completed attestation form (found on the [Mass Email Support form web page](#)), and a PDF version of the survey. A member of the BACB will reach out during the review process to retrieve these elements.*



# AUDIENCE REQUIREMENTS

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- **Resource Announcements**

This content type applies to mass emails that announce resources, such as books, journal publications, white papers, products, or services relevant to the practice of behavior analysis (e.g., software, billing services).

- **Continuing Education Events**

This content type applies to mass emails that advertise continuing education events offered by ACE Providers.

- **Invitations to Join Provider Networks**

This content type applies to mass emails that advertise provider networks. These emails are typically sent to new clients by insurance providers or funders.

- **Professional and Regulatory Communication**

This content type applies to mass emails that include public policy position statements, legislative initiatives, or convention information and surveys—all of which must be behavior analytic in nature and relevant to BACB certificants.

*Applications that fall under this content type must be submitted by established professional associations or regulators. Applications should be submitted at least 30 days before the desired send date, as the review process may take longer than the standard 3 business days. Direct lobbying and indirect legislative efforts (e.g., grassroots organizations) will not be permitted.*

## Certification Types

Applicants are able to specify one or more of the BACB's certification levels (e.g., RBT, BCaBA, BCBA, BCBA-D) to be the audience of their mass email; however, some certification types may be ineligible depending on the content type selected. For example, applications related to employment may not be sent to RBTs.

# CONTENT AND FORMATTING REQUIREMENTS

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## Content and Formatting Requirements

### Standard Mass Emails

Applicants should keep the following considerations in mind when building and submitting a mass email:

- The content of the mass email must align with the content type specified in the application.
- The mass email must clearly state which organization is responsible for the mass-email delivery (i.e., if a third party submits the application on behalf of another organization, this must be clearly stated and noted in the content).
- The mass email must include the BACB's mandatory disclaimer. Applications lacking the mandatory disclaimer will be denied. The disclaimer may appear in the body of the email or as a footnote:

*MANDATORY DISCLAIMER: The BACB's distribution of this message does not constitute sponsorship, approval, or endorsement of (Company name) or the content of the message.*

*This message was distributed as part of the BACB's paid mass email system, and unsubscribing will prevent receipt of mass emails from any party, regardless of your BACB Account settings. Should you unsubscribe, you can resubscribe at <https://www.bacb.com/want-to-resubscribe-to-mass-emails/>.*

- All requested contents must be included within the body of the mass email, as it is not possible to include attachments. Hyperlinks are permitted.
- Applicants must include any desired formatting (i.e., bold, italics, text-alignment, bullets, numbers, colors, tables, etc.) when designing their emails.
- Applicants can include imagery within the body of their email, but only in PNG, JPG, JPEG, and GIF formats. Inclusion of a PDF may cause delays in processing or may result in the application being denied.
- The BACB is not responsible for the look or design of the mass email. The applicant must provide a mock-up for their email to the BACB (i.e., a Word document with all text, images, and content formatted as desired). Applicants will receive a test email to review during the processing stage, and can provide notes and edits to ensure the final product is correct before approving it for delivery.

### Pre-Built Html Emails

Applicants who prefer to develop their own email design using code or 3rd-party software may submit their mass emails in the form of HTML. **The BACB does not provide HTML support and will not make any changes or alterations to the code.** If an applicant wishes to change or alter their mass email before delivery and the application included pre-built HTML content, the applicant must provide the updated HTML. This submission method may cause processing times to extend beyond the standard 7-day period.

Applicants should keep the following considerations in mind when building and submitting a mass email using HTML:

- There is a difference between HTML for emails and HTML for websites. If a developer is designing the mass email, applicants should ensure that they are taking those differences into account.
- The BACB uses Campaign Monitor to implement its mass email service, and code generated by another software may not innately work with it. The applicant is responsible for resolving any code differences that could cause upload difficulties, and the BACB is not responsible for delays in application-processing times due to HTML updates.

# CONTENT AND FORMATTING REQUIREMENTS

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- The BACB mandatory disclaimer is still required for HTML emails. If the applicant does not include the mandatory disclaimer in their HTML, their application may be denied.
- If an applicant chooses to utilize not-publicly-hosted images, a .zip file with all of the images used in the HTML will need to be provided to the BACB. The .zip file should be named appropriately so that the HTML being submitted in the application can reference it. If the applicant does not provide the .zip file in a timely manner, the application may be denied (the BACB will attempt to contact the applicant for the imagery once prior to denial). Please note that any references to images that are not publicly hosted online will not show in the application preview. The BACB will always send a test email from the mass-email system for such applications to ensure the applicant can see the email in its final state for approval purposes.

To submit an HTML mass email, please use the normal mass email application. A member of the BACB will reach out to retrieve the HTML file and any respective .zip files during the review stage.

# OPTIONAL SERVICES

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## Optional Services

### Authentication

Unfortunately, the BACB cannot guarantee that a mass email will be opened or pass a spam filter. To mitigate this risk, applicants should use an online program that assesses their email address and determines the likelihood that the email will trigger a spam filter. Find these programs online by searching “mass email spam checker.”

In addition, the BACB offers an optional authentication process for email domains (i.e., @bacb.com). Authentication is no longer a guaranteed way to protect against advanced spam filters, and in some cases, authentication is not possible (e.g., free-to-use Google and Yahoo email addresses, certain university email addresses). Even so, authentication still makes a difference in certain situations.

To authenticate a mass email:

- If the applicant is not comfortable altering their host server by adding DNS and TXT records or changing TTL and DKIM settings, they should consider involving an IT professional or someone who is comfortable doing so.
- Before paying their invoice, the applicant should tell the BACB that they wish to authenticate their domain. They may do so by replying to the approved determination.
- A member of the mass email team will then respond to the applicant with further installation instructions.
- Once the applicant—or someone assisting the applicant—has made the necessary installations, they should notify the BACB so that they can test the connection and troubleshoot if necessary. This can take anywhere from 15 minutes to a week, depending on technical comfort and troubleshooting.

For further technical instructions and details about the authentication process, please visit Campaign Monitor’s [Email Authentication](#) web page.

### Engagement Metrics

Applicants may request their mass-email engagement results during the processing stage of the application or after delivery by using the [Mass Email Support](#) form. The BACB requires 3 standard business days after the release of the mass email to collect and record data. However, it is recommended that applicants request their engagement metrics 7 days after release, as 95% of engagement occurs within the first week. If the application includes a follow-up email, it is best to wait 7 days after the follow-up is released.

Upon request, the engagement metrics the BACB provides can include:

- total audience size
- total opens
- unique opens
- open rate (%)
- total clicks
- unique clicks
- click rate (%)
- total unsubscribed
- unsubscribe rate (%)
- total marked as spam
- total social media shares
- engagement timeline

Please be aware that the BACB does not automatically send engagement metrics. It is the responsibility of the applicant to request the data within 365 days of the delivery.

# REFERENCE

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## Reference

### Documents and Resources

#### Overview

- [Mass Email Service](#)
- [Mass Email Support Form](#)

#### Important Notes

- [Terms and Conditions](#)
- [BACB Certificant Registry](#)

#### Audience Requirements

- [Survey Attestation Form](#)

#### Optional Services

- [Campaign Monitor Email Authentication](#)

## Glossary

**403 Errors:** A special set of errors that, while rare, can occur when an applicant attempts to submit an application. 403 errors prevent the application submission from going through. The BACB is not automatically made aware of 403 errors, so it is the responsibility of the applicant to notify the BACB via the [Mass Email Support](#) form.

**Authentication:** An optional service provided by the mass email team that adds a specific email domain to the mass email system. Authentication is not a guaranteed way to improve the metrics of a mass email, but it can improve the chances of success in certain situations. Authentication is not available for free-to-use email addresses. Most universities are also ineligible for authentication due to privacy and security concerns.

**Applicant:** An organization (or an individual acting as an organization) that is the responsible party behind the submission of a Mass Email Application. Applications are organized by applicant, not contact person. Regardless of which contact person handles the application submission, all applications are expected to abide by applicant-related policies and procedures. Applicants can have multiple contact persons.

**Audience:** The segment of the BACB certificant body that the applicant selected to receive the mass email. Applicants specify their audience by selecting geographic locations, a content type, and certification types in the Mass Email Application. No further audience segmentation is available, and requests for custom audience segments cannot be supported by the mass email team.

**Behavior-Analytic Community:** The greater industry that the BACB serves and supports. Applicants must be a part of or serve the behavior-analytic community to use the mass email service.

# REFERENCE

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**Contact Person:** A person acting on behalf of the applicant. The contact person is responsible for submitting the application with the appropriate content and formatting, liaising with the mass email team, receiving and paying the invoice related to the application, and providing follow-up information or requests as needed. Applicants may have multiple contact persons. Furthermore, a single contact person may represent multiple applicants.

**Content Type:** One of the three audience demographics an applicant must specify in the application. The content type chosen should match the content of the desired mass email in the application. If the content type does not match the application content, the application may be denied.

**Determination:** The mass email team's decision to approve or deny an application. Once a decision is made, a contact person from the mass email team will deliver a notice of determination to the applicant. Approved determinations are accompanied by a notice of approval and an invoice (sent to the contact person's BACB account). Denied determinations are accompanied by a notice of denial, an explanation, and depending on the reason for denial, an invitation to reapply.

**Domain:** The portion of an applicant's requested reply-to email address after the "@" symbol. The mass email system only references domains for the BACB's optional authentication service.

**Employment Email:** A particular category of mass email on which the BACB applies particular limitations, specifically around the eligible audiences an applicant can select. Employment emails cannot be sent to RBTs, nor can mass emails that contain RBT-related employment opportunities. The mass email system is built to implement this limitation on its own, but should an application be submitted that is an RBT-targeted employment email or employment opportunity, the application will be denied.

**Initial Email:** The standard product provided through the Mass Email Application. It is an email campaign generated to match the contents, formatting, and requested send details of the applicant as specified in the application.

**Fee:** The amount due to the BACB before an approved Mass Email Application can proceed to processing. As a prepaid service, no work will be performed on the application until payment is received.

The BACB holds the right to waive fees without explanation. All applicants should assume that the estimated fee in the application will be the fee to send the mass email.

**Follow-Up Email:** A additional email campaign that can be requested in an application. It is identical in every way to the initial email aside from a different subject line and a different delivery date. Adding a follow-up email to an application adds a 50% fee on top of the standard fee.

**HTML Emails:** Mass email contents that have been pre-built by the applicant and sent as code to the BACB. HTML emails require a level of technical expertise, so the BACB requires additional time for review. The BACB does not provide HTML support and will not make changes or alterations to the code on the applicant's behalf.

HTML emails that contain code errors or that do not cooperate with the mass email system require the applicant to fix the code in a timely fashion. The BACB is not responsible for delays in processing or delivery due to large-scale code changes or untimely responses. The applicant's refusal to update the code or communicate with the BACB for more than 2 weeks may lead to a denial of the application.

**Mandatory Disclaimer:** A disclaimer that all applicants must include within the content of their mass email. Applications that do not include the mandatory disclaimer may be denied.

# REFERENCE

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**Mass Email Application:** A completed form from the [Mass Email Service](#) web page. Applications contain all of the information needed to:

- identify the applicant,
- identify the contact person(s) acting on behalf of the applicant,
- define a specific segment of the BACB certificant body as an email campaign audience,
- create an email that contains the content and formatting desired by the applicant,
- determine an ideal date of delivery for that email campaign,
- determine if a follow-up email campaign is needed, and
- generate a unique invoice based on the particular information provided.

Applications are organized at the applicant level, meaning that the applicant and all involved contact persons must abide by the applicant-related policies and procedures.

**Processing:** The final stage of the application process, in which the mass email team converts the approved application into the requested mass email campaign. At this point, the contact person should make all additional requests known to the mass email team. Processing does not begin until proof of payment has been received.

**Proof of Payment:** An auto-generated notification sent to the BACB when the applicant has paid the invoice in their BACB account, or a physical check received by the BACB. Once proof of payment is received, the mass email team may begin processing the approved application.

**Reply-To Email:** The email address provided by the applicant that the mass email will be sent from and that certificants can reply to.

**Review:** There are two different ways in which the term “review” is used for mass emails:

1. The first stage of the application process after submission, in which the mass email team reviews the applicant and application and provides an approved or denied determination.
2. A step in the processing stage where the BACB sends the applicant a test email for review, allowing the applicant to provide notes and edits prior to approving the email for delivery.

**Survey:** A category of mass email that requires additional, specialized review from the BACB and supplemental documentation from the applicant.

**System:** An umbrella term for the software and programs used in the mass email service. The system is responsible for hosting the application form, handling the technical requirements of each campaign, generating metrics based on results, producing invoices in BACB accounts, and organizing the mass email queue.

# VERSION HISTORY AND UPDATES

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## Version History and Updates

### Version 1.0.0 (04/20/2021)

This is the original development of this resource. This version was not made public and was for internal review and approval by the BACB only. The first public version of this resource is 1.0.1.

### Version 1.0.1 (05/03/2021)

This is the first public version this resource. Changes made between versions 1.0.0 and 1.0.1 are not recorded within this document, as they did not impact policies and procedures of mass email applicants or certificants. Future updates to this resource will be recorded here as upcoming versions are needed.

### Version 1.0.2 (08/20/2021)

These policies and procedures were updated to align with alterations made to the online mass email application. These changes include:

- Removal of references to the Body of Email field.
- Altering of language referring to the review step of the processing stage.
- Altering the language referring to HTML emails and how they are submitted.
- Updating of references to the Mass Email Support form and what it does and does not handle.
- Updating of timelines related to the review and processing stages.

### Version 1.0.3 (09/24/2021)

These policies and procedures were updated to align with alterations made to the online mass email application. These changes include:

- Updated language for the mandatory disclaimer.





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