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Social Media, Risk, and Policies for Associations

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A NOTE FROM THE AUTHORS



From member engagement and volunteer management, to thought leadership and word of mouth marketing, social media is empowering associations and charitable organizations to

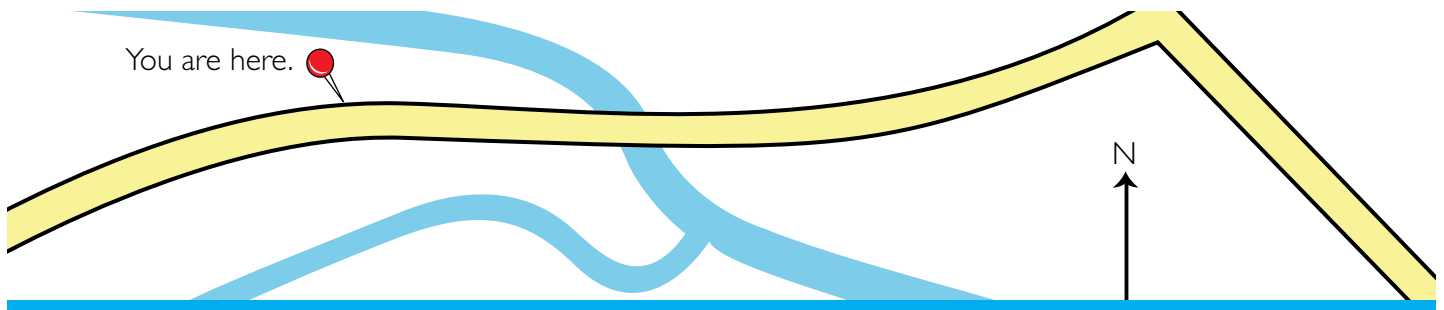
accomplish more by leveraging relationships. With every passing month of writing and speaking, we have watched hundreds of association executives come to a very important, if somewhat scary, revelation. Engaging in social media requires a shift in the way associations view themselves and their relationships with members. The shift is happening on a cultural, organizational, and individual level. Before committing resources to a social media program, associations want to know how to mitigate the risks while maximizing the rewards. The first step is to create a safe space for staff, volunteers, and

“...associations want to know how to mitigate the risks while maximizing the rewards. The first step is to create a safe space for staff, volunteers, and other stakeholders through clear, effective social media policies.”

other stakeholders through clear, effective social media policies. Clarity over control. If everyone involved knows the purpose of the organization’s social media initiatives—if each individual is clear about his or her role in achieving that purpose and the parameters in which they can participate—those social media initiatives will be that much more successful from the start.

The purpose of this white paper is to help association executives create effective social media policies for themselves, their staff, and key

volunteers. We’ll use our own social media guidelines as a template. We’ll show you the building blocks we used to write the guidelines, and explain what risks each section is meant to address. We hope you will feel free to use it, edit it, and put it into language consistent with your own organization.



LAYING THE GROUNDWORK

Social media policies are one component of a bigger picture. When you're laying the groundwork for your social media efforts, it's important to be very clear about your objectives, your strategy for achieving those objectives, and the role your staff and key volunteers can play to help. That means working across departments to coordinate efforts and to figure out how everyone's work fits together. That also means inviting strategic thinking from the staff and volunteers who will be actively engaged in social media on behalf of the organization. The most successful efforts break out of traditional silos and organizational hierarchies to enable staff and volunteers to accomplish more together.

ASSESSING RISK

While different associations face different types and levels of risk when engaging in social media, the steps to mitigate those risks tend to be fairly similar. For any new program or service, conducting a risk assessment and mitigation prior to launch will help determine which issues need attention. A risk assessment consists of first identifying your risks or exposures to harm, from the mundane to the serious. The next step is to evaluate these risks in terms of how often an event may occur versus the potential financial effect if the risk happens. After the assessment of the possible frequency and severity of an identified risk, you establish your priorities for mitigating the various exposures. You address the most severe and frequent events first. [More about risk assessment.](#)

MITIGATING RISK

Once you understand your risk, you can develop techniques for managing it. Many associations choose techniques like 1) avoiding certain platforms, 2) prohibiting some activities, or 3) limiting who can participate. While these techniques may be useful in the short term as you develop your objectives and strategy, we would argue that all three techniques are an attempt to exert control when clarity would be better over the long term. Here are a few methods that rely on clarity to manage risk.

- Adopting policies for staff and volunteers
- Monitoring the social web so you know what people are saying
- Providing education on legal issues like copyright and anti-trust
- Providing education on social media principles
- Updating insurance policies to provide coverage for your social media work

Once you've laid the groundwork, you'll need to dig right in to the social media policy basics.

8 STEPS FOR BUILDING SOCIAL MEDIA CAPACITY

- 1 Monitor the social web for discussions about your brand and industry.
- 2 Understand your objectives for using social media.
- 3 Develop a social media strategy by prioritizing those objectives and applying your learning from monitoring in step 1.
- 4 Assess and mitigate your risks—include your legal counsel and insurance professional in the discussion.
- 5 Make sure your insurance coverage is appropriate for your social media activities.
- 6 Adopt the appropriate policies and guidelines.
- 7 Set up interdepartmental workflows for social media collaboration.
- 8 Educate your staff and volunteers.

SOCIAL MEDIA POLICY BASICS

The most basic policy, frequently referred to as a social media policy or social media guidelines, provides a framework for your employees' and key volunteers' online behavior. Your association's social media policy is a statement of how your association and its stakeholders will use social media tools and techniques to achieve your goals. Should your social media strategy change, your social media policies will likely need to change as well.

The nature of your policy can range from minimal guidance to full prohibition, however the breadth and value of social media makes it very difficult to restrict employees' online behavior. Most policies encourage employees to engage in online communities, and offer guidance on how to participate effectively while protecting both the employee and the organization. You may be able to have a single, universal policy that will apply to all, or you may need to have two or more policies that apply to specific sets of people. Remember, a simple policy is nearly always better, because it is more likely to be remembered and followed.

“Social media policies that are too restrictive will handcuff your staff and volunteers from ever developing the skills and processes they need to build that capacity.”

ADOPTING POLICIES

How do you know it's the right time to adopt a policy? Some organizations—especially small staff organizations with low risk—are quite comfortable operating without a specific social media policy. But most organizations are looking at policies as a way to add structure and harness social media enthusiasm from their staff and volunteers. They might even be hearing from employees who are specifically asking for guidance.

Many associations adopt a social media policy prematurely—before having a social media strategy, in response to an embarrassing incident, or simply because other organizations are doing so. We believe that adopting policies too soon is counterproductive. For associations to take full advantage of social media, they need to build the capacity to handle two-way communications with ever-increasing immediacy. Social media policies that are too restrictive will handcuff your staff and volunteers from ever developing the skills and processes they need to build that capacity.

Policies should flow from your social media strategy and serve to educate your staff. You're giving staff and volunteers guidelines for how your association expects them to use social media in spaces where members (past, present, and future) are, which is essentially everywhere on the Web. Ideally, in the process of developing both your strategy and policy, you'll involve key staff and volunteers—especially the people who are using social media tools and have insight into what will work well for your association.

SEIZING THE POSSIBILITIES

Perhaps the biggest risk of social media is the missed opportunity for organizations not participating or engaging poorly. Social media enables people to collaborate and form groups and to find information for free. Some associations may have their very survival at risk if they do not adapt to this changing landscape.

The social media policy we'll outline in this white paper is designed to encourage engagement within a framework that provides direction and clarity of purpose. The policy is not about regulating Facebook, or Twitter, or any specific site for that matter, since the tools change too frequently for that type of policy to be practical. Therefore, these policies focus less on the “don'ts” and more on the “do's” so your employees and top volunteers can share their enthusiasm for their association in any online space. From here, your staff and volunteers can figure out the most effective ways to collaboratively and strategically engage members in any social space.

“The policy is not about regulating Facebook, or Twitter, or any specific site for that matter, since the tools change too frequently for that type of policy to be practical.”

CHARACTERISTICS OF A GOOD POLICY

For your staff, the social media policy is a personnel policy that interfaces with other corporate policies affected by social media such as codes of conduct or ethics, conflict of interest, and confidentiality.

Ideally, your social media policy will make interacting on the web easier, more comfortable, and safer for your stakeholders, while enhancing their ability to accomplish their work. Depending on your approach to writing your policy, your members and volunteers may be able to adopt the same policy as your staff, or a slightly modified version that incorporates your association's code of conduct or code of ethics.

All good policies—including those for social media—share a few characteristics. Good policies are...

Built on trust • A good policy starts from a position of trust—belief that your people want to do the right thing. The job of the policy is simply to guide your people on their behaviors and activities in social media. A policy focused on what and how to do social media is preferable to a long list of what you don't want people to do.

Practical • A good policy reflects your association's values and culture. If the organization trusts and empowers its employees then the policy is more flexible and grants greater discretion to the employees. The policy should be intuitive to your employees and members based upon their understanding and acceptance of its culture. Employees should not have to review the policy every time they plan to interact online but only when they are presented with a new or unusual situation.

“A good policy starts from a position of trust—belief that your people want to do the right thing.”

Designed to educate • Social media is evolving constantly, so the policy is as much education as rule making. The various outposts (Facebook, LinkedIn, Twitter, YouTube, etc.) have their own culture and unwritten rules, which are likely different from your association's website. Use your policy to help your people be successful in their online interactions.

Without absolutes • Eschew establishing a zero tolerance policy; avoid using words such as must, shall, always, and never. Zero tolerance is very difficult to enforce and limits your

MORE POLICIES TO CONSIDER

We're focusing on guidelines for staff and volunteers who are engaging in social media related to the organization. But there are lots of policies and plans worth reviewing to make sure they are up-to-date with your social media strategy.

- terms of use/user agreements
- disclaimers
- community guidelines
- privacy policy
- copyright policy
- anti-trust policy
- branding/trademark guidelines
- blogging guidelines/blog moderation policy
- crisis communication plan
- business continuity plan
- employee code of conduct

options in addressing a transgression. You will never identify the multitude of ways a person can use the Internet for good or evil (people can be very creative). Management needs to be able to use discretion in addressing situations they never considered; to be able to assess each infraction and determine the appropriate discipline.

In plain language • Avoid the use of legalese or highly technical language (unless you are a technical organization). A policy that is easily understood encourages meaningful and appropriate participation.

Friendly • You don't want people to be put off by your policy... quite the opposite. You want them to feel like it's safe to engage because they know what's expected of them.

Consistent • The policy needs to be consistent throughout the organization. You can grant different privileges to different personnel levels but the privileges and expectations need to be constant for all people within that level. Enforcement also needs to be consistent so that the same discipline is given to a similar infraction. Being consistent and even-handed will help you keep your social media efforts on course while avoiding accusations of favoritism or discrimination.

Prepared for mistakes • Mistakes happen. You want to outline a clear path for correcting mistakes. Going a step further; if someone violates your trust or policy, you need to be clear how those mistakes will be handled.

Clear about due process • A person that violates the policy should have access to due process by being able to present his or her side of the story. Due process is especially important if the infraction has serious disciplinary consequences.

“Start with the simplest policy that could possibly work.”

POLICY STRUCTURE AND CONTENTS

When you're creating your social media policy, follow the policy model used within your organization. The document needs to be *your* social media policy and reflect *your* association's culture and core values. The actual social media guidelines—the meat of the policy—can be selected from an array of alternatives chosen to meet your association's mission.

Start with the simplest policy that could possibly work. Your organization may not need every single component outlined below, especially if you already have other policies in place to deal with things like consequences and due process. On the other hand, you may need more structure than we have listed if, for example, your organization has specific legal risks that need special attention.

KEY COMPONENTS

The model in this whitepaper is in three sections:

Preamble—This section is your introduction. It usually includes the organization's philosophy or core values relevant to online activities, their purpose for using social media, who the policy applies to, and acknowledgement that the policy may change.

Main guideline points—This section is the meat of the policy. Some of the points frequently covered include professional versus personal identity, transparency, authenticity, disclaimers, disclosure, confidentiality, copyright, attribution, avoiding spam, avoiding accidental endorsements, and more.

Conclusion—This section covers what happens when something goes wrong. It usually lays out the procedures and consequences in case the policy is not followed for any reason.

TIPS FOR WRITING YOUR FIRST SOCIAL MEDIA POLICY

It's easy to get caught up in all the different audiences and guidelines you want to include. Staring at the blank page can be intimidating. Here are a few tips to get you past the writer's block and get something down on paper:

Pick one audience. Start with writing a policy for your employees. It may help to focus on a single employee—perhaps the one most involved with social media. Don't worry about expanding or altering the policy for different audiences such as board members, key volunteers or chapters until you have a good basic policy written.

Refer to other organizational policies in your social media policy. Don't crowd the social media policy with too much information. Stay focused on the social media things.

Forget about the tools. You could create separate policies unique to every tool (blogs, microblogs, networking sites, media sharing, etc.) —it would take too long and need updating every third day as the tools change. Instead, focus on the universal truths about online behavior:

Write more DO's than DON'Ts. Empower your audience with what they can do, not what they can't do. Simple stuff...like DO be honest. DO use appropriate privacy settings. DO share content that is publicly available.

Copy from folks who are making it work. This white paper has a good sample with some annotation to help you decide what you need. You should also check out examples from these sources:

[Intel Social Media Guidelines](#)
[Sun Guidelines on Public Discourse](#)
[IBM Social Computing Guidelines](#)
[Mayo Clinic](#)
[Edelman Online Behavior Policies and Procedures](#)
[Easter Seals Internet Public Discourse Policy](#)
[NTEN Community Values](#)
[Social Media Governance Policy Database](#)
[10 Must-Haves for Your Social Media Policy](#)
[Opposites Attract: Corporate Social Media Guidelines](#)

SAMPLE SOCIAL MEDIA POLICY

In this section, we will look at the SocialFish social media guidelines, inspired by the [Intel](#) and [Sun Microsystems](#) examples. This is written with a personality consistent with the SocialFish culture, and it contains all of the key components we feel should be covered in every social media policy. We've annotated this in such a way as to point out all of those components; if you take this as a template, you can adjust the language and/or order of elements to match your own organization's culture.

Since we are evangelists for the strategic use of social media, we encourage a very open social media policy that empowers all employees to partake. However not all associations are ready or able to embrace such a non-restrictive approach. Your social media policy will reflect your perceptions of the risks and rewards of social media engagement, and will be as open or restrictive as you deem necessary. You'll need to modify our model to address your own needs and expectations.

ANNOTATED SOCIALFISH SOCIAL MEDIA GUIDELINES

PREAMBLE

These are the official guidelines for social media use on behalf of SocialFish. If you're a SocialFish employee, intern or contractor creating or contributing to any kind of social media both on and off socialfish.org, these guidelines are for you. We expect all who participate in social media on behalf of SocialFish to understand and follow these guidelines, and to be aware that they will continually evolve as social media evolves. Check back periodically to make sure you're up to date.

The preamble to SocialFish's social media policy explains who the policy applies to. It also reserves the right to change the policy. This preamble does not explicitly state the purpose and objectives for using social media, but you might choose to include that.

MAIN GUIDELINE POINTS

Live the SocialFish philosophy. In online social networks, the lines between public and private, personal and professional are blurred. Just by identifying yourself as a representative of SocialFish, you are creating perceptions about SocialFish and your expertise. Be sure that all content associated with you is consistent with your abilities and SocialFish's philosophy (that social media is about building relationships—not a numbers game).

SocialFish begin their main guideline points with a statement about their core philosophy. This is meant to help educate new employees about the responsibility that comes with being a part of the SocialFish brand. This first point could be included as part of the preamble instead.

Understand and use privacy settings on outposts. We don't expect all of your social media use to be work-related, but we do expect you to keep the items you share with your close personal friends separate from what you share with your work "friends."

This point relates to employee privacy and professional conduct. It is meant to educate new employees about creating an appropriate filter between their personal and professional online identities.

Be yourself. You are responsible for the content you post. Never impersonate someone else, or purposely obscure your identity as a SocialFish. Build your own reputation. Care about what you are talking about.

This point relates to two core social media values: transparency and responsibility. In this model, SocialFish has decided that the risk of appearing duplicitous is more damaging than the risk of having an employee identify themselves openly and potentially become an accidental spokesperson.

MAIN GUIDELINE POINTS CONTINUED

State when it's your personal opinion versus the SocialFish opinion.

For your personal blog, twitter account, or lifestream, we have a handy disclaimer that you can use. Always disclose if you've received something in exchange for a review of a product or service.

Write what you know. Stick to your area of expertise and provide unique, individual perspectives on what's going on at SocialFish and in the world.

Don't tell secrets. Respect proprietary information and content, confidentiality, brand, trademark, copyright, and fair use. Know the laws and don't break them. Don't discuss client work without permission.

Don't spam. Ever. You can link to other SocialFish blog posts or information about services but do it subtly and only in response to a specific query. We have other ways of sharing our awesomesauce.

Give credit where credit is due. Always cite when quoting someone else. Make sure images are shareable through [Creative Commons](#), and attribute them, too. Never use copyrighted material without permission.

Mistakes happen. If you make a mistake, admit it quickly. Most of the time, you can then move on. If not, let the team help you fix your mistakes; explain the situation and the team can come together to find a solution to any problem.

This point refers to disclosure, an important piece of the trust and transparency puzzle. A disclaimer states that the author's opinion are his or her own.

New FTC regulations require everyone to disclose any benefits received in exchange for a posting (payment or free merchandise, for example).

This point is about deferring to experts—it's crucial that employees not misrepresent themselves as experts in any particular area or subject on which they are not; this would be the equivalent of giving wrong advice. Your policy may need to go into more detail, depending on your industry and risk assessment.

This point addresses some important business and legal concerns. If your strategy and risk assessment hones in on a particular business or legal concern—for example, spam, or anti-trust—you may want to add a separate, more specific guideline point to address that risk.

This point highlights what SocialFish identified as a particular concern, considering the volume of content they create. There are specific laws against spam, and it's always a bad business practice.

This point highlights one of the biggest legal risks for social media—copyright and attribution. Every social media policy should have this element. Your guideline point on copyright might be more specific or restrictive depending on your tolerance for this risk.

This point acknowledges that mistakes happen—having a process for dealing with them will help avoid liability issues. If necessary, this should be one scenario in a wider crisis communications plan so everyone is aware of the process should something arise. SocialFish has chosen a very simple process, but in some cases, an association will need a much more detailed process for correcting mistakes—especially if certain kinds of mistakes can result in legal concerns.

EXAMPLE DISCLAIMER

This is my personal blog.

Oops, there I go again—sharing my personal opinion on my personal blog. You should know that I work for SocialFish. I wouldn't be a SocialFish if I didn't have my own identity, personality, and opinion. So please take everything written here as my own, and not representative of the SocialFishes.

In other words: This is a personal blog. The opinions expressed here represent my own and not those of SocialFish, my employer.

MAIN GUIDELINE POINTS CONTINUED

Share the love. We believe in sharing and linking to the best content from all over the web. A link is not an endorsement, so don't be shy about sharing something from a competitor if you feel it is worthwhile to our clients and friends.

Be a good conversationalist. Monitor and reply to comments in a timely manner; when a response is appropriate. Add value to the conversation.

Be clear, but not defensive. Be polite and professional, especially when you disagree with someone. Once the words are out there, you can't get them back. If you find yourself working too hard to defend your position, take a step back, let the community defend for you (because they will if you're justified).

Remember everything online is discoverable. If you can't show it to your mother or a judge, don't post it. If in doubt, ask.

Always be learning. This space is fast-moving and ever-evolving. Read more than you write. Ask questions. Link to others and always build relationships. That's what our work is all about.

CONCLUSION

We trust that you will live and breathe these policies. If, for any reason an incident occurs that violates the policy, we expect you to bring the issue to our attention immediately so that we can work together toward a resolution. We'll work through each issue on a case-by-case basis, and we'll listen to every side of the story. We promise that any consequences will be commensurate with the violation.

This point relates to endorsements. SocialFish has chosen to explicitly state that links are not an endorsement. This is a common viewpoint across the social web, but it's still a good practice to be clear on your organization's linking philosophy in both your social media policy and in other policies such as user agreements, disclaimers, and blog policies.

This piece relates both to process and to philosophy—SocialFish has identified relationship building as a key business strategy, so responsiveness to the conversation is very important. Your strategy may focus more on listening and less on conversation. In that case you might choose a guideline point to match listening as a key strategy.

This point is about professional conduct online. It is also designed to help cooler heads prevail, avoiding embarrassment and potential legal issues like slander and harassment.

This point relates to privacy and legal responsibility. It is meant to educate new employees about the potential consequences of posting something that is inappropriate or illegal.

SocialFish has chosen to conclude their guideline points with a summary statement about the organization's philosophy and core values and how employees can live those core values.

In this final paragraph, SocialFish has chosen to emphasize their trust in employees' intentions, even as we outline the process and consequences for violating the policy.

ALTERNATE LANGUAGE FOR KEY POLICY POINTS

You've reviewed the SocialFish social media guidelines and the annotations we provided as a brief explanation of each point. We recognize that not all associations are in the same place as SocialFish; each association must embrace social media at its own pace. You may require some different language and emphasis in your policy. To help you, we offer some alternative language to consider for several key elements and guideline points in your policy. Much of this alternative language was adapted from the sources mentioned in the endnotes on page 14.

Philosophy statements

SocialFish details its philosophy within its guidelines, in *Live the SocialFish philosophy*. Many organizations choose to state their philosophy in the preamble instead. It does not matter where you discuss the media strategy or philosophy but it should be a part of the overall policy or guidelines. Here are some samples of other organizations' philosophy statements.

- To encourage our employees to engage in communities (wherever they gather) as champions to talk about our association, programs and services, and our work
- To build relationships, increase learning, and support collaboration
- To share our expertise with others
- To acknowledge our employees as ambassadors of our association and brand (online, offline, or anywhere).
- To share the exciting things you (employee) and we (association) are learning internally, learning from others, and doing.

Guidelines on personal responsibility

An employee may be an official spokesperson engaging your members on behalf of the organization. Other employees may be participating in less formal ways. Therefore it is important to remind all employees that they are responsible for what they write and how they participate in social media. SocialFish handles personal responsibility in several places: *Live the SocialFish Philosophy, Understand and use privacy settings on outposts, Be yourself, and Remember everything online is discoverable*. Other ways of saying this:

- Be responsible. Blogs, wikis, photo-sharing and other forms of online dialogue are individual interactions, not corporate communications (unless posted by authorized [Association] personnel). All employees are personally responsible for their posts and participation. ⁽³⁾

- Your participation in social media on behalf of [Association] is not a right but a privilege that needs to be taken seriously and with respect. What you write, post or contribute is ultimately your responsibility. Failure to abide by these guidelines and [Association's] Code of Conduct, Code of Ethics, or other personnel and corporate policies could put your participation at risk. ⁽²⁾

Applicable organizational policies

SocialFish is a small firm with very few organizational policies such as a personnel handbook. Your association may have extensive personnel policies, codes of conduct, antitrust, or even legal guidelines for external speech that are applicable to online activity. Your social media guidelines are only one of many policies so it needs to tell employees that their online activities are subject to other corporate policies and guidelines.

- [Association's] Standards of Business Conduct and other [Association] policies including [samples of applicable policies – all personnel policies, antitrust, trademark guidelines, privacy requirements, etc.] continue to apply. ⁽⁵⁾
- Know and follow [Association's] Code of Conduct. Failure to abide by these guidelines and the Code of Conduct could put your participation at risk. ⁽²⁾
- Follow all applicable [Association] policies. Among the policies most pertinent to this discussion are those concerning [list some of the applicable policies, i.e., government affairs, political activity, computer, email and Internet use, media use and releases, etc.]. ⁽⁴⁾

Confidential and proprietary information

This is extremely important and should be in every social media policy. This section corresponds to *Don't tell secrets* in the SocialFish guidelines. Here are some alternative ways to state this.

- Don't Tell Secrets. The nature of your position may provide access to confidential or proprietary information. Remember to respect and maintain the confidentiality entrusted to you. Do not divulge or discuss proprietary information, internal documents, personal details about other people or other confidential material. ⁽³⁾
- Don't Tell Secrets. You are responsible for content you post so please use common sense. It is appropriate to talk about work and have dialog within a community but it is not acceptable to publish proprietary information or any

content under a non-disclosure agreement. When in doubt or a tough judgment discuss it with management or the Legal Department before publishing.⁽⁵⁾

- If you wish to write about a project or experience directly related to [the association, committee, member], request permission from the head of the project who is responsible for the flow of information about the project.⁽⁷⁾

Intellectual property and link love

Social media is another form of publishing so the same intellectual property laws apply. The main issues are copyright infringement, defamation, invasion of privacy, plagiarism, and infringement of trademark, trade dress or trade secrets. The best mitigation techniques are to avoid posting copyrighted material, cite the author when quoting or provide a link to the original content, and request permission to use images or music unless available under [Creative Commons](#) with attribution. The guidance regarding defamation and invasion of privacy can be addressed under “exercise good judgment,” or Google’s famous [don’t be evil](#). Your association may have a separate intellectual property policy that you can reference in the social media guidelines. SocialFish addresses the copyright, trademark infringement, and plagiarism issues under **Give credit where credit is due**. Other ways to express this:

- Follow the established terms and conditions of use established by the outpost. Don’t do anything that would violate those rules.
- Do research to find others blogging, authoring or tweeting about your topic. Always cite your source and always try to link back to original url to create link love.⁽⁷⁾
- Broaden the conversation by citing others, allow your content to be shared or syndicated.⁽²⁾
- Evaluate your contribution’s accuracy and truthfulness before posting. Be accurate, truthful, and without factual error. Provide hyperlinks to all sources that can support your argument.⁽¹⁾
- Identify any copyrighted or borrowed material with citations and links.⁽¹⁾

Community and value

SocialFish reminds us that social media is about building relationships in **Be a good conversationalist**. Other ways to say it:

- It’s a conversation. Talk to your readers like you would talk to real people. Consider content that’s open-ended and invites response. Encourage comments.⁽²⁾
- Always add value and insight, attempt to educate, solve a problem or just don’t bother.⁽⁷⁾

- Are you adding value? Write stuff people value – you should help members, customers, partners and co-workers. Be thought-provoking and build a sense of community. If your content improves knowledge or skills; builds businesses; helps people do their jobs; solves problems; or builds better understanding of the [Association] – you are adding value.⁽²⁾

Authenticity and transparency

Authenticity and transparency are driving factors in social media so it is beneficial to remind people. Often it is unclear to others if an employee is acting in an official capacity online where posting content may imply that it is the official position of the association. To avoid any misunderstandings you can require your employees to include a disclaimer on their personal blog, wiki, forum, photo-sharing account, or video channel. Some associations require a disclaimer while others just encourage employees to indicate that they are speaking for themselves and not the association. SocialFish addresses authenticity and transparency in **State when it’s your personal opinion versus the SocialFish opinion** and **Be yourself**. Other options:

- Write in the first person, however, whenever your connection to [Association] is apparent, make it clear you are speaking for yourself and not on behalf of us. We [suggest/recommend/require] you include the following statement perhaps in the “About Me” section of your blog or website:⁽⁴⁾
 - The views expressed here are my own and do not reflect the views of my employer.
 - The postings on this site are my own and do not represent [Association’s] positions, strategies or opinions.
- If posting in an unofficial capacity, make it clear you are speaking for yourself and not on behalf of [Association]. If the posting (including any photo or video sharing) has to do with your work or subjects associated with [Association], attach a disclaimer:⁽³⁾
- Be transparent. Your honesty or dishonesty will be quickly noted. If blogging about work at [Association] use your real name, identify you work for us and be clear about your role. If you have a vested interest in a product or services, point it out.⁽²⁾
- Don’t write anonymously. If commenting publicly about any issue you’re engaged in as an [Association] employee, even loosely, you must make your status as our employee clear. Also be clear whether speaking for yourself or us.⁽⁵⁾

Exercise good judgment

In addition to authenticity and transparency, good judgement is critical for anyone using social media within an organization. This is such an important point that SocialFish addresses it in three of its guidelines. **Don't spam. Ever** is both a nod to courtesy and recognition that there are anti-spamming laws. **Be clear, but not defensive** is a reminder to be respectful and seek to avoid online battles. Last, **Remember everything online is discoverable** is a critical point. The requirements of electronic discovery (providing electronic information to the courts) are both onerous and expensive to complete. Remind your employees that anything they post online or store electronically can be recovered and may have to be provided to the opposing party. The discovery request can extend to both personal and professional spaces (cell phones, smartphones, networking sites, media-sharing services). We strongly recommend you include a specific statement on electronic behavior and discoverability. Here are other ways to say this:

- Be Smart. A blog or community post is visible to the entire world. Remember – what you write will be public for a long time. Be respectful to the association, employees, members, clients, corporate sponsors and competitors. Also strive to protect your privacy. ⁽³⁾
- If it gives you pause, pause before you publish. If you're about to publish something that makes you even the slightest bit uncomfortable – take a minute to review these guidelines and try to figure out what's bothering you, then fix it. If you're still unsure discuss the situation with a manager or our legal counsel. ⁽²⁾
- Respect the privacy of members, colleagues and opinions of others. Before sharing a comment, post, picture or video about a member, colleague or client through any type of social media, his/her consent is not only a courtesy, it is a requirement.
- Obey the law. ⁽¹⁾ Don't post any information or conduct any online activity that may violate applicable local, state or federal laws or regulations. ⁽¹⁾
- Be respectful. Whether in the actual or virtual world your interactions and discourse should be respectful. We all appreciate actual respect. ⁽⁵⁾
- Think about consequences. Using your public voice to trash or embarrass the [association, member, committee] or yourself is not only dangerous, but not very smart. ⁽⁵⁾

- Avoid personal attacks, online fights and hostile personalities. If someone posts a statement you disagree with, you can voice your opinion but don't escalate the conversation to a heated, personal argument. Speak reasonably, factually, and with good humor. Try to understand and credit the other person's point of view. Avoid communicating with hostile personalities in an effort to avoid personal, professional, or credibility attacks. ⁽¹⁾
- Be Respectful. It's OK to disagree with others but cutting down or insulting readers, employees, bosses, members or corporate sponsors and vendors is not. Respect your audience and don't use obscenities, personal insults, ethnic slurs or other disparaging language to express yourself. ⁽³⁾

Write what you know

When an employee is writing within her area of expertise, her passion and genuine interest will shine through. SocialFish tells us to **Write what you know**. Other policies say it in these ways:

- Ensure you write and post about your area of expertise, especially as it relates to [Association]. ⁽²⁾
- Write what you know best as a way to be interesting, stay out of trouble and have fun. ⁽⁵⁾
- Write What You Know. You have a unique perspective on [Association] based on your talents, skills and current responsibilities. Share your knowledge, your passions and your personality in your posts by writing about what you know. If you're interesting and authentic, you'll attract readers who understand your specialty and interests. ⁽³⁾
- Evaluate your contribution's accuracy and truthfulness (without factual error) before posting. It is always helpful to provide hyperlinks to credible sources that can support your position. ⁽¹⁾

Fixing mistakes

We all make mistakes and unfortunate things happen in the world of social media. Someone posts inaccurate information, sends the wrong link, says something they regret later, offends or angers another, or inadvertently posts something private. Remind your employees that once the words are out there online they can't get them back—they exist forever. But if a mistake is made, the first course of action is to respond quickly, fix the error, and apologize when appropriate. SocialFish uses that approach with *Mistakes happen*, and again in their conclusion. Other options:

- When you correct a mistake or modify an earlier post, make it clear you have made a change. Use strikethrough on the original text and then add the new information. Alternately, add an update (date specific) to your earlier post.
- When you make a mistake—correct the small ones, escalate the big ones to your supervisor. Use good judgment to know the difference.
- Did you screw up? If you make a mistake, admit it. Be upfront and be quick with your correction. If you're posting to a blog, you may choose to modify an earlier post—just make it clear that you have done so. ⁽²⁾

Policy infractions and due process

The SocialFish policy includes a final paragraph that describes what happens in the case of a policy infraction. Your employees need to know the consequences for violating the social media policy. Any policy with the potential to discipline an employee should provide the employee with due process. "Due process" means the employee is informed of the allegations and given the opportunity to defend themselves. If your association has personnel policies there is probably a section addressing employee discipline which should also apply to social media infractions. The discussion of infractions may refer the employee to the appropriate policies with a statement such as this:

- Failure to abide by these guidelines and [Association's] Code of Conduct, Code of Ethics or other personnel and corporate policies could put your participation at risk.
- The consequences for violating these policies range from a warning to withdrawal of social media participation, and possible termination.
- We expect all who participate in social media on behalf of [Association] to be trained, to understand, and to follow these guidelines. Failure to do so could put your future participation at risk. ⁽²⁾

CRISIS COMMUNICATION

Sometimes an incident or issue becomes viral—it travels quickly throughout the online world. When the viral message is negative, your reputation is at risk. You need to be able to respond quickly. Give employees some guidance on identifying a potential incident and how to report it to the appropriate personnel. Hopefully you are using numerous listening tools so you will know early if your association may have a problem.

Ideally you have a crisis communication plan that defines when an incident becomes a crisis and how it will be handled. Most plans identify the official spokespersons, your media contacts, how to notify key personnel, and how you respond to the incident. Social media can be a great tool for getting your message out to your members, sponsors, donors and key stakeholders, as well as the media. Make sure your crisis communication plan is current with how social media will be used to counteract a crisis. Social media can also be an integral part of your business continuity plan as a tool for communicating with employees, members, and others.

Productivity

The SocialFish policy does not include any specific mention of productivity, as the tools are so closely tied to the daily work of the company. For many associations, a point about productivity is very appropriate. Here are two examples:

- Work Matters. Ensure that your blogging doesn't interfere with your work commitments. Discuss with your manager if you are uncertain about the appropriateness of publishing during business hours. ⁽³⁾
- Productivity matters. Remember that in order for your social media endeavors to be successful, you need to find the right balance between social media and other work. ⁽⁴⁾

POLICIES, CLARITY, AND MAKING IT WORK

Right now your head may be swimming in policy soup—how's that for a mixed metaphor? So we just wanted to get back to a few key points that may have passed you by somewhere between there and here.

1. Engaging in social media requires a shift in the way associations view themselves and their relationships with members. The shift is happening on a cultural, organizational, and individual level.
2. The most successful efforts break out of traditional silos and organizational hierarchies to enable staff and volunteers to accomplish more together.
3. Providing clarity of purpose and a framework for success is a better, more sustainable long term plan than trying to control how staff and volunteers use social media.

We invite you to consider how these three realities will impact your organization as social media becomes a more integrated part of the daily routine. Think about how your social media policies can both respect the current culture of your organization and reflect your vision for how the culture will evolve.

Also, think about ways that you can add more clarity to your social media work. Obviously, good policies are one piece. Other questions to answer: How might you collaborate with staff and volunteers who have a stake in the success of your social media work—regardless of their age, level, or specialty? How might you educate your staff and volunteers about the organization's social media work? How might you set up a good monitoring program, with clear processes for responding when needed?

Working through these questions and more will help you transition towards clarity over control—clarity so that everyone knows what you're trying to do and what you're about, everyone knows what role they have to play, and everyone knows what parameters exist for them to play those roles safely. The one thing you can still control with social media is how clear you are about your purpose and process—and that clarity will make the risks much easier to manage.

Endnotes

In the *Alternate Language for Key Policy Points* section, we quoted or adapted language from the following:

1. [Edelman Online Behavior Policies and Procedures](#)
2. [Intel Social Media Guidelines](#)
3. [Easter Seals Internet Public Discourse Policy](#)
4. [For Mayo Clinic Employees](#)
5. [Sun Guidelines on Public Discourse](#)
6. [10 Must-Haves for Your Social Media Policy](#)
7. [Opposites Attract: Corporate Social Media Guidelines](#)

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This white paper is not legal advice, and none of the authors are lawyers. We've done our best to present the process for creating social media policies and the common points you should consider including, but your policy should be reviewed by your attorney and risk manager before you finalize it.

The costs of writing, designing, and producing this white paper were shared between SocialFish and Croydon Consulting in order to be able to provide this as a free resource to the association community. After all, there is no charge for awesomesauce.