



## **SOCIAL MEDIA GUIDELINES: ETHICAL, SAFE AND EFFECTIVE STANDARDS<sup>i</sup>**

### **I. Mission**

To establish guidelines for staff, consultants, volunteers, members, and stakeholders (users). This document covers conduct and expectations of all those participating on our social media or social networking platforms.

### **II. Ethical, Safe and Effective Practical Standards**

#### **A. Audience:**

These guidelines are for members, staff, consultants, volunteers and others who:

- (a) Are charged with creating and/or updating social media sites and forums;
- (b) Participate in COTAPSA's social media sites and forums

#### **B. Definitions:**

Social media/networking includes all forms of online publishing and discussion, including but not limited to: blogs, wikis, file-sharing, user-generated video/audio, social networks and other social networking applications.

#### **C. Ethical, Safe and Effective Practical Standards:**

Guiding principles apply to users participating in social media as a responsibility or who participate to advocate and advance the interests and endeavors of COTAPSA.

Failure to follow the guidelines will put participation, employment and membership at risk.

1. Follow Appropriate Industry Laws and Guidelines
2. Be Informed
3. Be Respectful
4. Properly Attribute All Content
5. Be Responsive
6. Use Discretion
7. Transparency, Honesty, and Integrity
8. Professionalism
9. Authority
10. Respond to Violations of Standards

#### **Public (Non- Members)**

Given the public nature of social media sites/platforms, there will always be non-members who visit and participate on them. Such participation is welcome as a means of sharing information, suggesting improvement, etc.

While not held to the same standards and guidelines as members, non-members are expected to abide by our Code of Behavior with appropriate actions to be taken against those in violation.

#### **Appropriate Public Non-Member Conduct:**

By participating users agree they will not post the following:

- Material threatening, harassing, illegal, obscene, defamatory, libelous, or hostile towards any individual or entity.
- Any phone numbers or email addresses in the body of their comments.

- Material that infringes on the rights of COTAPSA or any individual or entity, including privacy, intellectual property or publication rights. Including improper use of (but not limited to) images, logos, videos, content, documents, white papers, etc.
- Material promoting/advertising a commercial product or soliciting business or membership, or financial or other support in any business, group or other organization.
- Chain letters,
- The same comment multiple times, or otherwise distribute SPAM.
- Also, comments under multiple names, using another person's name, or allowing another individual/entity to use their identification to post or view comments is not permitted.

If a user is found to be in violation of any Standard, COTAPSA has the authority to ban future posts. Bans include refusing posts from specific email addresses or IP addresses, or the removal or editing of comments at any time, etc.

### **III. Ethical, Safe and Effective Practical Standards: Guidelines**

#### **Standard No. 1 - Follow Appropriate Industry Laws and Guidelines**

Always conform to all appropriate laws and regulations, as well as guidelines adopted by and governing COTAPSA.

Adhere to all appropriate intellectual property laws and guidelines.

Communications must not contain confidential, proprietary or trade-secret information.

#### **Standard No. 2 - Be Informed**

Stick to your area of expertise.

Provide a unique perspective on what is happening at COTAPSA, within your field, or community.

Staff/Board -- Read comments, ask for questions, and provide input and opinions.

Write shorter entries... often.

Announce campaigns, appeals and successes and keep readers informed with up-to-the-minute information

#### **Standard No. 3 - Be Respectful and Polite when Disagreeing**

Post meaningful, polite and respectful comments. No SPAM, off-topic or offensive remarks, etc. If misrepresentations are made about COTAPSA by the media, analysts or other bloggers, respectfully identify yourself, point out the error and stick to the facts (or flag to staff).

When engaging in such a discussion, stay appropriate, polite and on point.

When in doubt, consult a colleague or in the case of staff to contact supervisor.

Think of the constituency that reads the posts as an extension of the constituency served.

#### **Standard No. 4 - Properly Attribute All Content**

When reposting or retweeting content from other users, it will be attributed it and linked appropriately. Respect proprietary information, content, and confidentiality at all times. Material with copyrights cannot be reposted to social networks without prior permission.

The ED or President to check entries to reduce the chance of providing incorrect or inappropriate information

#### **Standard No. 5 - Be Responsive**

Pause and think before posting.

Reply to comments in a timely manner when a response is appropriate and advances the topic and understanding. Staff to flag negative comments to supervisor

With ED, President and Communications Chair define what issues COTAPSA can and wants to respond to.

### **Standard No. 6 - Use Discretion**

Referencing COTAPSA in the social media environment can have far-reaching impact- positive and negative. Common sense and best judgment overrides everything. Anything posted is accessible to anyone with a web browser.

Participating in the social web on behalf of COTAPSA is a serious professional opportunity. If posting something making you uncomfortable, review the Standards, if still unsure, discuss with your ED, President or Communications Chair

### **Standard No. 7 - Transparency, Honesty, and Integrity Are Paramount**

- i) *Transparency*: Full disclosure, attribution and transparency are critical. Never write or comment anonymously, or use a fake profile. For any work or social media activity engaged in on behalf of COTAPSA, identify yourself.
- ii) *Honesty*: Be truthful. If an error is made immediately correct. In a blog, if modifying an earlier post, make it clear you have done so, and indicate date of change or update.
- iii) *Integrity*: Check and conform to COTAPSA's branding/communications guidelines to ensure the integrity and uniformity of these is maintained through all social media.

### **Standard No. 8 - Professionalism**

Social media posting is serious, it is a responsibility.

### **Standard No. 9 - Authority**

COTAPSA has determined (policy/constitution) who is to speak for it (**EA/ED, President, and those who are delegated authority (ie. consultant)**). A policy has been established regarding social media platforms, creation and management. Advance authorization should be received from the ED and/or President, and sensitive posting information run by them in advance.

Receive clearance when creating a presence on any additional social network websites, or creating any social networking forum on behalf of COTAPSA.

Before deleting any forums, content, or comments, review and receive prior approval from the authorizing representatives (President, Chair, and ED).

When creating an official presence on a social media network, use a legitimate, designated COTAPSA email address. Make sure the ED (or designee) is provided with the username and password for these sites.

**Do not publish content contradicting the COTAPSA's mission or values.**

### **Standard No. 10 - Respond to Violations of Standards**

All users must be familiar with COTAPSA Standards.

Staff are to follow current policies and ethical guidelines i.e. Confidentiality.

Staff to have proper approval and authority before engaging on a public platform.

The President/ED will determine how to respond when there is inappropriate behavior through social media.

The staff, primarily the EA, with oversight from the ED will manage social media platforms. Postings from COTAPSA will come from either the ED, Communications Chair or the President. Content examples: COTAPSA events, Toronto news, association issues

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<sup>i</sup> Content from Association of Fund Raising Professionals

<https://www.afpnet.org/files/ContentDocuments/SocialMediaGuidelines.pdf>

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\*Note: Standard No. 9 – Authority: updated on August 16, 2017