sample social media guidelines and policies

# Use this template to build a social media policies and strategies for your Health Center.

The [YOUR ORGANIZATION] defines social media as internet-based communications tools with a focus on interactivity, user participation, and information sharing. These include social networking sites, forums, blogs, online chat sites, and video/photo posting sites or any other such similar output or format, including but not limited to Facebook, Twitter, LinkedIn, YouTube, and Google+.

[YOUR ORGANIZATION] recognizes today’s widespread use of social media and the importance of the internet in shaping a positive image and brand of our organization and health centers overall. [YOUR ORGANIZATION] also recognizes the important role staff play in helping shape that image through their use of social media. To that end, [YOUR ORGANIZATION] sees social media as an opportunity to:

* Build new and strengthen existing relationships and collaborations with health centers, primary care associations and health center controlled networks, advocates, influencers in the healthcare arena, and other public and private organizations and individuals with shared or complementary missions.
* Expand our ability to reach, educate and mobilize potential supporters and advocates.
* Serve as a significant source in the online environment of information related to healthcare delivery to medically underserved people and communities and the health centers that serve them.
* Expand the reach of our messages and information via channels that individuals, policymakers, thought-leaders and the media increasingly turn to as their main source for information.
* Share important breaking news related to the health center community.
* Boost traffic to [YOUR ORGANIZATION]’s main web site as well as to its subsidiary sites and other [YOUR ORGANIZATION] social media vehicles.

**NOTE: Policies contained in the *[YOUR ORGANIZATION] Employee Handbook* *and the [YOUR ORGANIZATION] Administrative Policy Manual* govern the use of [YOUR ORGANIZATION]’s electronic communication systems, equipment and resources. Also, policies in these two documents relating to staff conduct also apply to staff use of social media.**

**Policies and Guidelines for Social Networking**

[YOUR ORGANIZATION] employees are responsible for ethical and professional conduct vis-à-vis [YOUR ORGANIZATION] and are solely responsible for what they post online. Staff should use good judgment when communicating via social media.

* Staff may not discuss or disclose confidential and/or proprietary [YOUR ORGANIZATION] information online (or through any other means) to anyone, including, but not limited to, all entities and individuals that have a relationship with [YOUR ORGANIZATION], (i.e., through charterships/affiliations/partnerships, grants and contracts).
* Official [YOUR ORGANIZATION] news, statements, etc., are to be *first* shared through official [YOUR ORGANIZATION] social media accounts. Information that an employee thinks might be suitable for social networking distribution should be emailed to the [APPROPRIATE ORGANIZATION CONTACT] as the day‐to-day manager of all official accounts. Should the material be approved for social media use, the employee is free to re-tweet or re-post the information as desired.
* Information that an employee believes may be suitable for social networking distribution—for example news articles related to healthcare, health information from NACHC, the Centers for Disease Control and Prevention, the National Institutes of Health, Health and Human Services and others—through the official [YOUR ORGANIZATION] accounts for Twitter and Facebook should be forwarded to the [APPROPRIATE ORGANIZATION CONTACT] for approval. Should the material be approved, the employee may then feel free to re-tweet or re-post the information as desired.
* Every employee must respect the privacy rights of other employees and patients. Take care to avoid HIPPA violations. A HIPPA violation is “a breach or violation is an impermissible use or disclosure under the Privacy Rule that compromises the security or privacy of the protected health information (PHI).”
* Staff who participate, online or otherwise, in political and other public activities, **must do so on their own time and as a private citizen.** Also, when engaging in such activities, theymay not identify themselves as a [YOUR ORGANIZATION] representative unless given prior approval by the CEO.
* Staff may not use their [YOUR ORGANIZATION] email addresses for personal social media activities and purposes. External inquiries via online channels as they relate to [YOUR ORGANIZATION] and its activities should be referred to [APPROPRIATE ORGANIZATION CONTACT].
* No new social networking account/site may be launched as an official [YOUR ORGANIZATION] vehicle without approval by the [APPROPRIATE ORGANIZATION CONTACT].
* Staff members not authorized to engage in a social networking activity in an official [YOUR ORGANIZATION] capacity and who wish to do so, must get written approval by the [APPROPRIATE ORGANIZATION CONTACT]. Unless written permission is granted, staff members may not speak on behalf of [YOUR ORGANIZATION] via the organization’s official social media channels, nor may they represent that they do on non-[YOUR ORGANIZATION] social media channels, including their own personal social media accounts.
* In order to avoid conflicts of interest, impropriety, or trademark/copyright infringement problems, no [YOUR ORGANIZATION] trademark or servicemark instruments, including [YOUR ORGANIZATION]’s corporate logo, as wells as other logos owned by [YOUR ORGANIZATION]) may be used by anyone, online or otherwise, including vendors, sponsors, partners or others without approval from [APPROPRIATE ORGANIZATION CONTACT].
* External inquiries regarding [YOUR ORGANIZATION]’s confidential and/or proprietary information, including those received via personal internet activity, must be referred to those who are authorized to triage and/or respond to them.

Staff currently authorized are:

* + [APPROPRIATE MEDIA/COMMUNICATIONS CONTACT(S)]

[YOUR ORGANIZATION] social media channels are not the appropriate place to respond to complaints or negative comments or resolve issues concerning [YOUR ORGANIZATION] staff, officers, members, or activities. These types of concerns should be forwarded to appropriate internal officials/departments. If you are interested in sharing comments or feedback outside the scope of these channels, you should contact the [APPROPRIATE ORGANIZATION CONTACT]. Comments may be forwarded to other [YOUR ORGANIZATION] departments and personnel as needed to ensure appropriate follow-up.

**Final Notes About Conduct and Social Media**

Staff should always consider the content of their professional and personal social media posts before posting. Be mindful that certain content when shared could reflect poorly on your or a staff member’s professional reputation, the reputation of [YOUR ORGANIZATION], and the reputation of [YOUR ORGANIZATION]’s constituents, including health centers. For that reason, in addition to exercising sound, professional judgment when using social media, staff should also learn to use, enable and check privacy settings on all of their social media accounts.

Also, be aware that posting complaints, criticism, statements, photographs, video, or audio that can be can be viewed as malicious, obscene, threatening or intimidating, or that disparages [YOUR ORGANIZATION] employees, officers, constituents, vendors, or suppliers, or that constitute harassment or bullying, will not be tolerated. Inappropriate postings may result in disciplinary action up to and including termination of employment. (See the *[YOUR ORGANIZATION] Employee Handbook.)*

Lastly, supervisors are cautioned against connecting via social media with staff they manage, as blending professional and personal relationships via social media can create actual/perceived challenges in the workplace. Use the same judgment as would apply to any other social interactions.

These policies/guidelines apply to individual [YOUR ORGANIZATION] staff, as assigned, who have been approved by [APPRORIATE ORGANIZATION CONTACT] to engage online in an official [YOUR ORGANIZATION] capacity in certain areas. (SEE CHART BELOW.)

All other staff members who wish to engage in a social networking activity in an official [YOUR ORGANIZATION] capacity must get written approval by the appropriate account administrator as noted below. Unless written permission is granted, staff members may not speak on behalf of [YOUR ORGANIZATION] via the organization’s official social media channels, nor may they represent that they do on non-[YOUR ORGANIZATION] social media channels, including their own personal social media accounts.

As previously noted, no new social networking account/site may be launched as an official [YOUR ORGANIZATION] vehicle without approval by [APPROPRIATE ORGANIZATION CONTACT].

**Editing and Approval Guidelines**

The individuals below are responsible for the editing and approval of all posts, as well as the management and monitoring of [YOUR ORGANIZATION] social media accounts. Pre-posting clearance responsibilities include review/editing in final to ensure accuracy and appropriateness of content in accordance to [YOUR ORGANIZATION] policies and procedures. The [APPROPRIATE ORGANIZATION CONTACT] has ultimate oversight for policies and procedures related to [YOUR ORGANIZATION]’s online content and activities.

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| **[YOUR ORGANIZATION] Social Media Account** | **Department** | **Writers/Posters** | **Administrators** | **Oversight** |
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***Style Rules for Staff Using Social Media in an Official [YOUR ORGANIZATION] Capacity***

These guidelines apply to [YOUR ORGANIZATION] staff who have been approved by the [APPROPRIATE STAFF CONTACT] to engage online in an official [YOUR ORGANIZATION] capacity (e.g. updating the [YOUR ORGANIZATION] Facebook Page status message, Twitter feed, etc.).

1. **Be professional.** Although you may employ a more conversational tone on a social media vehicle, you are representing [YOUR ORGANIZATION] the same way you would in a presentation, a press release or during an appearance at an event.
2. **Be productive.** Don’t over post or post just for the sake of posting. Share useful, interesting information with your audience.
3. **Be neutral** except when relaying official [YOUR ORGANIZATION] information. For example, be enthusiastic in responding to a new funding announcement if an official [YOUR ORGANIZATION] statement has been released that expresses [YOUR ORGANIZATION]’s excitement and gratitude. But if linking to a study that would be of interest to health centers but for which [YOUR ORGANIZATION] has no official position, describe it as “relevant” or “topical” rather than offering an opinion or judgment.
4. **Be judicious** when it comes to the notorious back-and-forth nature of internet interactions. Focus only on correcting any inaccuracies of known facts; don’t worry about winning an argument. **In all instances,** **be civil**.
5. **Be clear** about [YOUR ORGANIZATION]’s comment/sharing policy by including ground rules—when necessary—to keep online conversations constructive. [YOUR ORGANIZATION]’s comment/sharing policy explains to followers what information [YOUR ORGANIZATION] finds appropriate and inappropriate, as well as what follower posts will be deleted, and why a follower may be blocked from the page/group.
6. These are common sense: **be honest**; **be accurate**; **be respectful**. Also, **be clear and concise**; even status message updates can be written well (or poorly).
7. **Be mindful** of [YOUR ORGANIZATION] rules *and the law*.

* Fair use/copyright: Do not copy or use another person’s or entity’s intellectual property as though it were your own. Properly attribute works that you reuse. The internet affords ample opportunity to link to whatever materials you deem important to your audience. Note “Fair Use” doctrine in U.S. law allows limited use of copyrighted material without permission from the rights holder, speaking specifically to use for nonprofit or educational purposes; refer questions to the [APPROPRIATE ORGANIZATION CONTACT].
* Handling of confidential personal or industry-related data: As previously noted, staff may not discuss or disclose online (or through any other means) confidential and/or proprietary [YOUR ORGANIZATION] information. Also, the Health Insurance Portability and Accountability (HIPAA) law *always* applies. **Personal medical information about patients can not be released without their, or their guardian’s, such as in the case of minors, written consent.** This includes information about a patient’s condition and the use of a patient’s likeness or voice (photography, video, audio, etc.), as well as information that may identify a person as a health center patient.
* Laws forbidding any partisan political activity: As a 501(c)(3) organization, certain legal restrictions apply to [YOUR ORGANIZATION] with respect to lobbying and partisan political activity. [YOUR ORGANIZATION] as an organization therefore should never appear as a “Fan” on any social media page/feed of an elected official, candidate for office or partisan political cause.
* When names, photos, user IDs, etc. are involved in social media posts/updates, secure written permission for use and err on the side of caution.

***General Quality Guidelines***

The ultimate success of [YOUR ORGANIZATION]’s social networking efforts depends on the quality and value of the content – as well as whether it is updated frequently enough to attract and sustain an audience. Set benchmarks and measurable goals to identify which posts contain the information of most interest and relevancey to [YOUR ORGANIZATION]’s audience and to ensure the overall effectiveness of [YOUR ORGANIZATIONS] social media efforts.

*Style/Technical Specifics – BLOGS*

* + Every blog entry should include a byline. The format for the byline is By: Firstname Lastname, where the name is linked either to the author’s biography (at [BLOG ADDRESS]) or his/her contact gateway (at [YOUR WEBSITE]).
  + Time-specific references should be offered when relevant but bear in mind that the entry may not be read on the day or moment of its release. For example, say, “The bill will be introduced today (Tuesday).”
  + “Live blogging” or posts that will be updated later should be described as such. Live blogging is not exempt from review requirements if the author must usually have his/her work cleared by a supervisor before publication.

*Style/Technical Specifics – FACEBOOK/TWITTER:*

While [YOUR ORGANIZATION] has established style guidelines in its *Publishing Guide* which is available on [YOUR ORGANIZATION]’s [INDICATE LOCATION OF STYLE GUIDE], technical limitations (such as the Twitter limit of 140 characters per update) require us to follow some of these rules “as best we can.” Also, these media present specific opportunities to render our information more accessible and searchable, and [YOUR ORGANIZATION] will take advantage of this whenever possible.

* Whenever possible, spell out Community Health Centers (capitalized) and/or Federally Qualified Health Centers (capitalized). Acceptable shortened forms are health centers (not capitalized) and FQHC or FQHCs, CHC or CHCs. Do not abbreviate the word “health” or the word “center” inside a post, comment, status update or “tweet” about health centers.
* Facebook and Twitter make extensive use of free “address shortening” services in order to comply with character limits. For example, an address such as http://www.NACHC.com/healthcentersandeconomicstimulus.cfm may be shortened automatically to an address such as http://bit.ly/3XOKr. ***[TIP: Organizations can use both Hootsuite and bit.ly to shorten links and both enable organizations to measure and track for social media analytics.]***
* Twitter and Facebook conventions include using hashtags to enhance searchability. The hashtag that has been adopted by health centers in the field is **#fqhc**.Use this hashtag as appropriate in Twitter and Facebook updates, at the end of the update. Other commonly used hashtags are #CHC, #AccessIsTheAnswer, and #CHCsInnovate.
* [YOUR ORGANIZATION] creates and uses unique hashtags for events. When Tweeting/Facebooking about these events use the unique hashtag.
* When possible “tag”—using an entity’s unique social media identifier, example: @NACHC— other organizations mentioned in the Tweet or post, as this will also share [YOUR ORGANIZATION]’s post/Tweet with their followers.