SOCIAL MEDIA GUIDELINES:
ETHICAL, SAFE AND EFFECTIVE PRACTICAL STANDARDS

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I. Mission

The goal of AFP's *Social Media Guidelines* is to both provide fundraising professionals guidance on social media for their workplace and to establish guidelines for Organization leaders to use with their staff, consultants, volunteers, members, stakeholders and affiliated groups. This document also covers the conduct and expectations of the public when participating in an organization's social media or social networking platforms.

Social media is an area that moves quickly and can be challenging, so it is important for Organizations such as AFP to provide resources for members and volunteer leaders. It's also crucial to support ethical guidelines that already exist with details and applications in the digital age. As the organization that links all of the different disciplines of fundraising, AFP is working to bring together the various pieces of this puzzle and provide a comprehensive view of social media.

Instead of focusing on specific media, the intention is to present guidelines that can apply to all variations and will apply as these specific channels mature and adjust over time.

II. Ethical, Safe and Effective Practical Standards

A. Audiences: These guidelines are intended for the following audiences:

- Organization and Affiliate Organization staff, consultants and volunteers who:
  (a) are charged with creating and/or updating an Organization's social media sites and forums;
  (b) participate in an Organization's social media sites and forums; and/or
  (c) participate in and/or promote their Organization's issues and agendas in non-Organization social media sites and forums.

- Organization and Affiliate Organization members and/or stakeholders who:
  (a) are charged with creating and/or updating an Organization's social media sites and forums;
  (b) participate in an Organization's social media sites and forums;
  (c) participate in and/or promote their Organization's issues and agendas in non-Organization social media sites and forums; and/or
  (d) participate and promote the fundraising profession, as well as professional fundraising endeavors and initiatives in both Organization and non-Organization social media sites and forums

- Public users (Non-members/Non-stakeholders) who:
  (a) participate in and/or promote an Organization's social media sites and forums.

B. Definitions:

Social Media: Social media or social networking includes all forms of online publishing and discussion, including but not limited to: blogs, wikis, file-sharing, user-generated video and audio, social networks and other social networking applications. At present, many Organizations are fully engaged with social media websites such as Facebook, Twitter, YouTube, Ammado and LinkedIn, and most intend to embrace all new social media environments that may appear in the future.

Participants on these sites include Organization and Affiliate Organization members and stakeholders, as well as non-members/the public. Organizations and Affiliate Organizations use these sites to interact with their members and/or stakeholders, potential members and fundraisers all over the world. Fundraising professionals also participate in these sites to advance their profession as well as their own initiatives and causes.

Before any audience participates in any social media activity, it is important that they either understand or have access to their Organization's current policies. These policies apply to participation in social media activities the same way that they apply to other activities that may be engaged in on behalf of the Organization.

Organization(s) and Affiliate Organization(s): When used in this document, the terms "Organization(s)" and "Affiliate Organization(s)" shall refer to and may encompass the following (if not also other) groups: Associations, Chapters, Nonprofits, Affiliates, Cooperatives, Partnerships, Federations, Fraternities, Guilds, Leagues, Societies, and Unions.

C. Ethical, Safe and Effective Practical Standards:

Organization and Affiliate Organization Staff, Consultants, Volunteers, Members and Stakeholders

Organizations fully respect the legal rights of its employees, consultants, volunteers, members and stakeholders. In general, what a person does on their own time is his or her affair. However, activities in or outside of work that affect job performance, the performance of others, or Organization business interests are a proper focus for Organization policy.

The following guiding principles apply to Organization and Affiliate Organization staff, consultants, volunteers, members and stakeholders who are asked to participate in social media as part of their job or Organization responsibilities or who participate to advocate and advance professional fundraising interests and endeavors, or personal interests related to charity and nonprofits. Failure to abide by these guidelines could put a person's participation, employment and membership with the Organization or Affiliate Organization at risk.

1. **Follow Appropriate Industry Laws and Guidelines**
2. **Be Informed and Interesting – and Listen**
3. **Always Be Respectful, and Be Polite When Disagreeing**
4. **Make Sure You Properly Attribute All Content**
5. **Be Responsive**
6. **Use Discretion At All Times**
7. **Transparency, Honesty, and Integrity Are Paramount**
8. **Don't Mix Worlds – Know the Line Between Professional and Personal**
9. **Be Authorized and Official**
10. **Respond to Violations of Standards**

<u>Public (Non- Members/Non-Stakeholders)</u>

Given the public nature of Organization and Affiliate Organization social media sites and platforms, there will always be non-members/non-stakeholders who will visit and participate in these sites, forums and discussions. Such participation, of course, is welcome as a means of sharing experiences, suggesting improvements, etc.

While not held to the same standards and guidelines as Organization and Affiliate Organization staff, consultants, volunteers, members and stakeholders, non-members/non-stakeholders should be expected to abide by certain codes of behaviors with appropriate actions to be taken against those in violation of such codes.

Appropriate Public Non-Member Conduct: By participating in Organization and Affiliate Organization social media (forums, discussions, blogs, etc.), public users agree they will <u>not</u> do the following:

- Post material that the Organization or Affiliate Organization determines is threatening, harassing, illegal, obscene, defamatory, libelous, or hostile towards any individual or entity.
- Post phone numbers or email addresses of themselves or any other individual or entity in the body of their comments.
- Post material that infringes on the rights of the Organization or any individual or entity, including privacy, intellectual property or publication rights. This includes the improper use of (but is not limited to) images, logos, videos, content, documents, white papers, etc.
- Post material that promotes or advertises a commercial product or solicits business or membership or financial or other support in any business, group or organization.
- Post chain letters, post the same comment multiple times, or otherwise distribute SPAM.
- Allow any other individual or entity to use their identification for posting or viewing comments.
- Post comments under multiple names or using another person's name.

If a user is found to be in violation of any of these Standards, Organizations and Affiliate Organizations reserve the right to do any or all of the following:

- Ban future posts from people who repeatedly violate the Organization's terms and conditions. Such bans may be affected by refusing posts from specific email addresses or IP addresses, or through other means as necessary.
- Remove or edit comments at any time, whether or not they violate these terms and conditions.

III. Ethical, Safe and Effective Practical Standards: Guidelines and Examples

Standard No. 1

Follow Appropriate Industry Laws and Guidelines

Guidelines:

- Always remember, when utilizing social media channels, to conform to all appropriate laws and regulations, as well as guidelines adopted by and governing their industry.

Examples:

- Keep in mind privacy laws such as HIPAA, Sarbanes-Oxley, etc.
- Follow all Direct Marketing Organization guidelines, such as opt-in, data protection, not marketing to children.
- Please adhere to all appropriate intellectual property laws and guidelines.
- Communications must not contain confidential, proprietary or trade-secret information.

Standard No. 2

Be Informed and Interesting – and Listen

Guidelines:

- Stick to your area of expertise.
- Provide unique, individual perspectives on what is happening at your Organization and within your field/community.
- Always "write what you know" in an interesting, educational manner. That being said, remember to also be open to learning and exploring new topics in an informed manner.
- Social media represents a two-way dialog – always remember to listen! Read comments, ask questions, discover what donors like and want, and ask for input and opinions. Engaging your donors and participants will increase interest and help retain your audience.

Examples:

- Write shorter entries more often to show you are engaged. Entries do not have to be long, just well thought out.
- Subscribe to your top five favorite social media, technology and nonprofit organizations online publications to keep current.
- Announce campaigns, appeals and successes to keep your online audience informed with up-to-the-minute information.

Standard No. 3

Always Be Respectful, and Be Polite When Disagreeing

Guidelines:

- Post meaningful, polite and respectful comments – no SPAM, no remarks that are off-topic or offensive, etc.
- Do not pick fights in a misguided attempt to drive traffic. Your goal is to engage and encourage, not offend.
- Do not make negative comments about the Organization, Affiliate Organization or other sites that may reflect poorly on the Organizations or community.
- If you see misrepresentations made about your Organization, members, stakeholders or the fundraising profession by the media, analysts or other bloggers, respectfully identify yourself, point out the errors and stick to the facts.
- There will be times where you may disagree with another person in a blog or discussion forum. Honest disagreement is fine, so long as you can detail and explain your opinion.
- When engaging in such a discussion, always stay appropriate, polite and on point.

Examples:

- Feel free to be yourself and let your your personality show. But when in doubt, consult a colleague or supervisor
- Think of the constituency that reads your posts as an extension of the constituency you serve in person. Your readers could be relatives, self-advocates, peers, competitors or just people who stumble upon your postings. Provide them with the same respect that you would to someone in person.
- Do not respond negatively to comments with which you do not agree. Alternatively present opposing viewpoints, multiple sides and diverse content when addressing entries from the public to illustrate you are being thoughtful and mindful of their comments.
- When responding, state that you understand or see their point of view. This approach allows you to show that you've read their comments and tried to walk in their shoes, and will encourage them to do the same. Then explain in a courteous tone why you disagree.

Standard No. 4

Make Sure You Properly Attribute All Content

Guidelines:

- When reposting or retweeting content from other users, make sure you attribute it and link to it appropriately. Respect proprietary information, content, and confidentiality at all times.
- While linking to an Organization's website is strongly encouraged, you may not repost copyrighted material to social networks without prior permission. Remember that the terms of service of a social media site apply to what you post and gather on that site. The terms might allow for material that you post to be used in a different way than intended.

Examples:

- Try to have a partner within your organization that you take turns with in checking your entries to help reduce the chance of missing an attribution or providing incorrect or inappropriate information.
- Make sure that you review the Creative Commons license or any copyrights of any photos or text that your are citing.
  - o Actual Example: A fundraiser who had published an article in a professional e-newsletter received a different e-newsletter a few months later with the same unique title he had used. The second e-newsletter had copied his story but didn't attribute it to him. The fundraiser contacted the second e-newsletter and asked for attribution and an apology, which he got. It is now easier than ever to gather information from web-based resources. Just make sure to ask permission or look for the Creative Commons license if you are going to use someone else's words or images. Often times many people are flattered to be asked to use their work in your project.

Standard No. 5

Be Responsive

Guidelines:

- Always pause and think before posting.
- That said, reply to comments in a timely manner, when a response is appropriate and will advance the topic and understanding.

Examples:

- Be timely in responding to posts or discussion threads about your organization and/or campaign utilizing your resources and internal staffing effectively. Response time depends on the size, location and scope of your organization and/or campaign.
- Global organizations are better poised to have human resources available at any moment, while smaller local organizations are more likely to respond within business hours or by the next business day.
- Define to what issues your organization can and wants to respond. Negative posts are not always the best to respond to quickly. Fueling an agitator or engaging them in nonproductive exchanges may not be the best use of resources.

Standard No. 6

Use Discretion At All Times

Guidelines:

- Referencing your Organization's programs or supporters in the social media environment can have far-reaching impact—both positive and negative.
- Common sense and best judgment are paramount. Use discretion—err on the side of caution.
- Participating in the social web on behalf of an Organization is a serious professional opportunity, so please treat it as such. Anything you post is accessible to anyone with a web browser.
- Always make sure to follow the terms and conditions for any third-party sites.
- If you are about to post something that makes you even the slightest bit uncomfortable, review these Standards. If you are still unsure, and it's related to Organization or Affiliate Organization business, please discuss it with your manager. A good rule of thumb: If it makes you uncomfortable, odds are, you probably shouldn't post it, but be sure to check.
- Ultimately, you have sole responsibility for what you post to your blog or publish in any form of online social media.

Examples:

- No matter how exciting it may be on a personal level to have the opportunity to meet movie stars, popular athletes and business leaders, do not Tweet or post comments or information on your personal Facebook page that you would not be totally comfortable posting in an "official" capacity as a delegate of your organization.
    - Actual Example: The Alpha Beta Foundation's annual gala often attracts some of the most popular celebrities of the day. Likewise, its board of directors includes not only celebrities, but also internationally renowned figures from the business world. There are appropriate and effective uses of social media tools to leverage this celebrity involvement to build excitement about your organization and attendance at events, and also credibility by indicating an endorsement. But take great care not to reveal "inside" information about celebrities that might compromise their safety, embarrass them or be considered an invasion of their privacy. For example, Tweeting how "cool it was to hear Angelina Jackson praise the foundation's work" is effective and acceptable. Tweeting the time and location that she will be leaving your gala is dangerous. Posting a photo of Warren Gates on your personal Facebook page with a derogatory comment about how he was dressed or behaved at a board meeting is likewise unacceptable.
- If you secure a major or planned gift, you might be tempted to celebrate your achievement through a posting. A general posting, such as "I had a great day - I finally nailed that big gift I've been pursuing for the last six weeks!" is acceptable. But any specifics that might offend or reveal private donor information are absolutely unacceptable. Saying, "I finally nailed that big gift I've been pursuing up in Connecticut - that grandfather in Groton who made so much money in Pfizer stock has had a falling out with his kids and has decided to give his money away to charity" is way too much information to post on Facebook! And always consider the donor—he or she might be annoyed at any sort of reference.

Standard No. 7

Transparency, Honesty, and Integrity Are Paramount

Guidelines:

- Transparency: Full disclosure, attribution and transparency are critical when representing an Organization.
    - o   Never write or comment anonymously, or use a fake profile.
    - o   For any work or social media activity you engage in on behalf of Organization or Affiliate Organization, identify yourself and your employment.
    - o   If this work involves a blog or social networking profile, you can add your work information in the "About Me" sections for these platforms.
- Honesty: Always be upfront and truthful.
    - o   Be the first to admit and respond to your own mistakes. If you make an error, be honest and up front about it, and immediately correct it.
    - o   In a blog, if you choose to modify an earlier post, make it clear that you have done so, and indicate date of change or update.
- Integrity: You should take care to check and conform to your Organization's branding and communications guidelines to ensure that both the integrity and uniformity of these items are maintained through all social media.

Examples:

- The Alpha Beta Foundation and the Kappa Delta Society have long been known to have overlapping program areas and often compete for the same donors. If you are an employee of ABF, posting derogatory comments about KDS's research and citing its work as ineffective— without revealing your employer and the source of your information—is highly inappropriate.
- Have an emergency response plan for social media prepared, such as what to do if bad news or developments hit your Organization or a key member of your leadership team.

Standard No. 8

Don't Mix Worlds – Know the Line Between Professional and Personal

Guidelines:

- <u>Work and Play</u>: Always make sure that your online activities do not interfere with your job or commitments to members/stakeholders/donors.
    - While social media posting for your Organization may be fun, it is also a job responsibility and must be balanced with all other responsibilities.
- <u>The Blurring of Public and Private</u>*:* Social networking sites have blurred the line between private and public activity. In many ways, today's social media pages have replaced the written letters of the past, but are more visible. Care must be taken.
    - Your Facebook page, your blog entries and your tweets—even if you intend them to be solely personal messages to your friends or family—can be easily circulated beyond your intended audience. This content, therefore, represents you and the organization to the outside world.
    - Likewise, you may view your personal Facebook posts or Tweeting as pure fun, but you must be extremely careful not to in any way compromise yourself or other staff or reveal confidential information about your programs or donors.
    - Keep in mind that many social media sites allow users to set privacy settings so that only family and friends can view posts. Please employ these settings should you wish to keep messages to a small private group.
    - Another good process to ensure a clean demarcation between the public and private worlds is for employees, consultants and volunteers to use a professional set of profiles/pages during work and a different set of profiles and pages for their personal needs.
- <u>Personal Time, Professional Impact</u>: Organization and Affiliate staff, consultants, volunteers, members and stakeholders will often engage in social media outside of work during their personal time. Recognize that everything you write or receive on a social media site is public. Regardless of how careful you are in trying to keep them separate, in your online activity, your professional life and your personal life overlap.
    - Use care that the content you post is consistent with your professional work, and that if you discuss work information, that you are authorized to do so.
    - If you are not authorized, always use an appropriate disclaimer—make it clear that what you say are your own personal views and opinions, and that you are not communicating as a spokesperson for an Organization (or note so in your online profile).
    - Never participate anonymously or use a pseudonym on social media sites when posting or engaging in discussion on topics or issues related to the Organization.
    - Don't discuss internal personnel or other staff issues in a social media forum.
    - Don't use your Organization or professional email address for personal or private social media activity outside work.
    - Clearly note who you are and your employer in all communications. Staff, consultants, members and stakeholders are expected to exercise personal responsibility whenever they participate in social media, and this standard includes not violating the trust of those with whom you are engaging.
- <u>No Unapproved or Personal Marketing</u>: Organization and Affiliate Organization employees, consultants, volunteers, members and stakeholders—when engaged in official online responsibilities—should take care to not use social media for unapproved or personal marketing or public relations.

Examples:

- Because of its viral and expansive nature, social media tools will expose you to the friends and colleagues of many of your co-workers and supporters. You might, for example, enjoy trading posts with a major donor of your organization and realize that you have much in common. However, draw a firm and careful line between personal and professional communications. Resist any language or nuance in your exchanges that might be seen as flirtatious or could ultimately be interpreted as harassment. Likewise, if you feel a donor is being inappropriate or pressuring you for personal involvement seek advice from your supervisor.
- Write entries in a professional and ethical manner. This does not mean you can't be witty, serious, etc., but always write with taste and your audience in mind.
- What is published on the Internet generally cannot be removed. Always ask, "Is this posting appropriate?" and "Would I want my current or future supervisor to read this?"

Standard No. 9

Be Authorized and Official

Guidelines:

- Any time you act as an Organization spokesperson, it is imperative that you first get proper approval. Consultants and vendors retained by the Organization are often (by extension) approved to act on its behalf, though this should always be confirmed at the start of any relationship.
- Your Organization will determine its voice and who is allowed to speak for it, and how its social media platforms are to be created and managed.
- Always assume that all social media activity will create a permanent written record of what you say. Get advance authorization from your supervisor and Organization, and be sure to run sensitive posting information by them in advance.
- Also get advance clearance any time you create an Organization or Affiliate Organization presence on any additional public social network websites, or create any social networking forum on behalf of your Organizations.
- Before deleting any forums, content, or comments, you must first receive prior review and approval from the authorizing Organization department or representatives.
- When creating an official presence on a social media network, you must use a legitimate, designated Organization or Affiliate Organization email address. Make sure to provide the IT, Marketing, and/or Communications department (or designee) with the username and password for these sites.

Examples:

- Health Profession: Unless an individual is serving as an approved, official spokesperson for a nonprofit hospital or an affiliated entity in online communications, such communications are the individual's personal opinions and do not reflect the opinion of nonprofit hospital or its affiliated entities. Each individual employee, physician, volunteer or other associate of nonprofit hospital or its affiliates is personally responsible for his/her posts (written, audio, video or otherwise).
- Be sure you don't publish content that contradicts the organization's mission or values. For example, if you work for a large medical research organization that prominently and frequently states that it does NOT engage in stem cell research as a policy, you must take extraordinary care if you choose to Tweet or post opinions or images that imply criticism of that policy. Be sure to identify yourself as an employee of the organization on any such postings, and use care not to reveal or discuss any privileged information or knowledge.

Standard No. 10

Respond to Violations of Standards

Guidelines:

- It is important for all participants to be familiar with these Standards.
- Educate yourself and follow your Organization's current policies and ethical guidelines.
- Always be sure you have proper approval and authority before engaging as an Organization spokesperson on a public platform.
- Follow all Organization and relevant policies and requirements.
- Pay special attention to policies that apply to confidentiality and communications.
- Organizations will need to determine how to respond when there is inappropriate behavior through social media.

Examples:

- Individuals may be held personally liable for defamatory, proprietary or libelous commentary.