Employee Guidelines for the Use of Social Media

Overview

Social media is an increasingly powerful way to engage audiences that are important to us, including grantees, our colleagues in the fields of health and health care and related disciplines, policy influencers, and others engaged in various facets of philanthropy. It is a way to build our professional networks and to learn from our peers. Staff in all corners of the Foundation are discovering and testing new ways to track developments in their fields, locate experts, share information, and get messages across to key audiences—and this exploration is important.

As the number of people using Web 2.0 tools grows, it is important for the Foundation to have a voice and a plan to meaningfully engage in the social media space in ways that support our Guiding Principles. Indeed, the responsible use of social media is consistent with our principles of promoting new ideas and encouraging innovation, being responsive to the field, and communicating clearly and openly, as we work to advance our mission of improving the health and health care of all Americans. And social media also can help us further other principles: to communicate clearly and openly to the field and to the public, to commit ourselves to lifelong learning and continual improvement, to represent different experiences and perspectives; and to respect the views of others.

You are encouraged to use blogs, wikis, social networks like Twitter, Facebook, Google+, and LinkedIn, and other Web 2.0 tools whenever they help you do your job. Value to your work is the key consideration—staff members are not encouraged to engage in discussions that are not germane to their jobs. The main thing to remember is that the same basic policies apply in the Web 2.0 world as in other areas of your work. If you wouldn't convey something in written correspondence or forward it in an email, it probably is not appropriate to distribute it via social media channels. The key to social media, and their power, is the fact that they are inherently viral. It is important to realize that it takes very little effort for those in your networks to spread what you share, and you cannot get it back once it's out there. Social media content can be most interesting and engaging when people's personalities shine through, but when using it as part of your Foundation work, you should strive to maintain appropriate professional tone and balance at the same time.
Speaking directly to the world carries risk; after all, while you are responsible for what you write, it also may reflect on the Foundation. More than anything, it requires good judgment and common sense. The purpose of these guidelines is to help employees understand how Foundation policies apply to these newer technologies for communications so you can participate with confidence. The guidelines do not attempt to address every potential scenario. The bottom line: the Foundation supports social media channels to advance our work and expects staff to minimize legal and reputational risks to themselves and the Foundation.

Two more points: First, nothing in these guidelines is intended to or will be applied in a manner that limits your rights under any applicable federal, state, or local laws, including the National Labor Relations Act. And second, please remember that the Foundation has the right to monitor all uses of our Electronic Communication Systems, including social media.
Guidance for Work-Related Use of Social Media

1. **Don't engage in campaign intervention or lobbying activities.** As a private foundation, the Foundation is prohibited from (a) supporting attempts to influence the outcome of any election for public office or (b) engaging in any direct or grassroots lobbying activity as defined here.

   Accordingly, when you are using social media as part of your professional life, do not either directly or through links to other content: (a) post content that expressly or impliedly endorses or opposes any candidate for public office or any political party (prohibited campaign intervention); or (b) engage in direct contact with government officials using content that expresses support for, or opposition to, any legislation, including a specific legislative proposal that has not yet been introduced (prohibited direct lobbying); or (c) refer to pending or potential specific legislation, reflect a view on it, and encourage others to contact government officials (prohibited grassroots lobbying).

   While you must not engage in the types of prohibited communications described above, these prohibitions certainly don’t preclude you from including government officials in your social media networks. Collecting different viewpoints, facts, and timely updates about the world around us from a variety of sources is one the chief goals of our social media engagement. It is acceptable to follow or include in your networks elected leaders, political appointees, and other government officials in their official capacity. (Make sure that you are including the official government accounts of government officials and not accounts associated with the political campaigns of individuals running for office.) If you are following policy-makers, do so with the aim of gathering a diversity of perspectives and political views.

   If you include policy-makers in your networks, you need to keep this in mind when you engage in these networks. Avoid liking, sharing (e.g., retweeting, pinning, posting) content posted by elected officials that makes reference to specific pending or proposed legislation, supports or opposes any candidate for public office, political party, or is otherwise politically controversial. Although you may not intend to endorse these statements, your actions may be interpreted as endorsements and could have legal and reputational consequences for the Foundation. Posting on a policy-maker’s wall or otherwise sending direct messages to policy-makers through your networks (e.g., Facebook or Twitter messaging) may be considered to be a form of direct communication with these policy-makers. Please think carefully about the legal and reputational aspects of any such targeted communications to policy-makers and consult with your supervisors before you send them. Danger alert: if such direct or targeted types of social media communications with policy-makers include references
to specific pending or proposed legislation and reflect a view on them they may constitute or be interpreted as lobbying.

2. **Know and follow all other applicable Foundation policies.** Foundation policies apply to your contributions to social media. Among the most pertinent policies, all of which are posted in the Foundation Policies section of the Intranet, are:

   A. Our Guiding Principles,¹
   B. Electronic Communication and Internet Use Policy,
   C. Anti-Harassment and Anti-Discrimination Policy,
   D. RWJF Logo Usage Guidelines,
   E. Code of Conduct,
   F. Conflict of Interest Policy, and
   G. Overtime Policy (for non-exempt employees)

3. **Be transparent.** If you are communicating with the public about the work of the Foundation, disclose that you work for the Foundation and be clear about your role. 'Where your connection with the Foundation is apparent, but you are speaking for yourself, make that clear. In those circumstances, include a disclaimer in an "about me" section of your social networking profile such as "The views expressed on this [blog, Web site, page, account] are my own and do not reflect the views of my employer." (Note: This standard disclaimer does not by itself exempt you from a special responsibility when using social media. Consider whether personal thoughts

1. Our Guiding Principles require us to be respectful of others, so do not post:
   a) Content that is unlawful, harmful, threatening, abusive, harassing, tortuous, defamatory, vulgar, sexually explicit, obscene, pornographic, libelous, invasive of another's privacy, hateful or racially, ethnically or otherwise objectionable;
   b) Content that falsely states or otherwise misrepresents your affiliation with the Foundation, or any person or other entity;
   c) Confidential business or personal information, or content that infringes any trademark, trade secret, copyright or other proprietary rights of any party;
   d) Content that makes available unsolicited or unauthorized advertising, promotional materials, sweepstakes, "junk mail," "spam," "chain letters," "pyramid schemes," or any similar forms of solicitation;
   e) Solicitations of funds from individuals or fundraising activities on behalf of grantees or others (these may run afoul of federal and state laws);
   f) Content that is fraudulent, false, inaccurate, or misleading; or
   g) Content that violates any law, ordinance, or regulation; that promotes illegal activities; that is harmful to minors.
you publish may be misunderstood as Foundation positions by virtue of your position.)

4. **Be mindful of existing messages on topics and strive for general alignment.** The lines between public and private, personal and professional are blurred in social media. Be aware of how your role in the Foundation might impact how what is being said is interpreted. If you are writing about a topic that the Foundation is involved in and you are not the expert, you should make this clear to your readers.

5. **Respect our confidential information.** Don't disclose confidential information about the Foundation that has not been disclosed publicly, e.g., about personnel, applications under review, pending changes to Foundation policies, etc., unless you have your supervisor's approval.

6. **Respect others’ works.** With regard to material owned by others, respect their intellectual property, e.g., their trademarks, trade names, logos, copyrighted materials, etc. Just because you can access information, photos, videos and other content on the Internet or elsewhere, doesn't necessarily mean you have the right to copy and post that content. Don't quote more than short excerpts of others’ works without permission and be sure to reference the source; generally, it is good social media etiquette to link to others’ work and give proper attribution. Do not link to material we could not post ourselves, e.g., a link to "email your Congressperson and say you oppose the XYZ Bill" or a link to "click here and contribute to Governor ABC's Re-election Campaign."

7. **Thoroughly read or watch the web content you intend to share before sharing on social networks.** Although a snappy headline and brief skim might inspire a quick retweet or like, read the entire article before sharing with your network. The same goes for video—watch the video to the final frame. You want to be sure the article or video does not contain action-oriented messages or branding that would be incongruent with our social media guidelines or other Foundation policies.

8. **Set boundaries for yourself early. Consider using separate accounts for personal and professional purposes.** You might want to use an account that refers to RWJF for discussing your programmatic work and a personal account where you can talk about personal topics such as your family and hobbies. Do not use your professional account to endorse or oppose a political candidate or party, for lobbying, or for other matters that are inconsistent with, or would negatively impact, the Foundation’s reputation or status.
The same rule applies if you have a “mixed use” (personal and professional) account. In that case, show sides of your personality, but don’t engage in prohibited campaign intervention, direct or grassroots lobbying, and be mindful of the Foundation’s reputation.

If a particular social network allows you to send messages to separate audiences, and you want to disseminate political or lobbying messages, make sure to send these only to your personal friends. And do not send any political or lobbying messages on Foundation time, no matter what audience you’re reaching. Finally, even if you are using a personal account, think about whether the thoughts you express may be misunderstood as Foundation positions by virtue of the position you hold.

9. **Don't appropriate the RWJF brand.** While you are encouraged to set up accounts and pages on social media sites when appropriate, please remember that you should not use any variations of the Foundation's name, initials or logo without prior approval from Creative Services.

10. **Ask, think, pause. When in doubt, ask questions.** Let your supervisor know how you are using social media for your work. If you are a non-exempt employee, your work-related use of social media must be done during your regularly scheduled work hours; you are not permitted to undertake this work from home. If you are unsure about what is appropriate to include in your social media tool, ask your supervisor. Remember, if you wouldn't want your supervisor or others at the Foundation to see your comments, it is unwise to post them via social media. And if you see anything that causes you concern, talk to your supervisor.

**A Note on the Personal Use of Social Media**

Many staff use social media tools such as LinkedIn, Twitter, Google+, Facebook, blogging, and other social media in their personal lives. By definition, because these uses are personal and take place outside of work, there are no Foundation rules or guidelines for their use. However, patterns of social media usage are leading to an increasing blending of personal and professional lives, which can cause confusion as to whether a person’s social media activities reflect their personal views or are representing those of RWJF. Thus RWJF asks that all staff be mindful of these considerations:

1. To the extent that people with whom you interact in your personal lives understand your connection with RWIF, you are in effect always representing the Foundation to some degree, and thus your behavior reflects upon it as well.
2. To the extent that your comments or other expressions in social media spill over to professional colleagues (for example, if professional colleagues are your "friends" on Twitter), those comments can have a bearing on how you are perceived by professional colleagues and thus can have a bearing (positive or negative) on how you are able to perform your job effectively.

3. If you have a “mixed use” account, and thus use social media during your workday, please be sure that your other work for the Foundation is completed in a timely and professional fashion. If you have questions about work priorities, discuss them with your supervisor. Further, under no circumstances may you send messages that might constitute prohibited campaign intervention or direct or grassroots lobbying while on Foundation time, no matter who the audience is.
Tips for Good Social Media Use

These tips draw on the advice and experience of bloggers for Microsoft, IBM, Sun Microsystems, Yahoo!, and others who use social media in their work.

1. Make a contribution. You can do so by writing about your ideas or experiences and by providing hyperlinks to the articles, studies, blog posts, or commentaries of others who have insights that you value. If you are linking to content, it is very important that you have reviewed the linked content entirely (e.g. you should read down to the final word in the article or view through the last second of the YouTube video) before you share it with others.

   Remember to avoid linking to content that is in and of itself prohibited campaign intervention, direct or grassroots lobbying. You must also avoid linking to content that, when combined with your message, constitutes these types of prohibited communications. This means that when you share links, you should ensure that: (1) the links do not expressly or impliedly support or oppose a candidate for public office, or a political party; (2) you are not sharing links in a direct communication with a policymaker that refer to pending or potential specific legislation and reflect a view on the legislation; and (3) you are not sharing links with the general public that refer to pending or potential specific legislation, reflect a view, and contain a call to action. A link likely contains a call to action if it: urges contact with a policy-maker; provides contact information for a policy-maker; provides an e-post card, petition, draft email or other means for communicating with a policy-maker; identifies a policy-maker as opposing or being undecided with respect to pending legislation or serving on the voting committee; or identifies the legislators serving a particular constituency.

2. Be conversational when you write. When writing, imagine you are talking on the telephone with a friend who is generally knowledgeable but may not understand the nuances of the topic. Be transparent, ask questions, invite comment, and listen.

3. Identify yourself and write in the first person about things you know; your credibility and knowledge will show. If you're not sufficiently knowledgeable about a particular subject, consider encouraging a colleague who is knowledgeable about the subject to write about it. (Reminder: our guidelines call for the use of a disclaimer such as, "These views are my own and don't necessarily reflect the views of my employer.")

4. Be prepared for disagreement, especially on controversial issues, but don't attack individuals or encourage individual attacks. In your post, provide details and
reasoning for your positions; when possible, acknowledge why people might disagree.

5. Be respectful. Remember that many people may read your posts; they are not private. If you have a nagging concern that you wouldn't want your post or comments to be read by a particular person, find a different way to express yourself, or find a different topic to write about altogether.

6. Be aware that irony, sarcasm, or other comments often do not translate in writing. If you mean your words ironically or sarcastically, you should probably rewrite your post to make sure your meaning is clear.

7. Copy-edit your posts. Use the spell-checker and be grammatically correct. Informality is not an excuse for misspellings, bad grammar, or poor style.

8. Be clear if you make updates to a post. If you correct a post or comment, say so.

9. Remember basic etiquette. Don’t post entries that are off topic to the blog or comments that are off-topic to the post you’re commenting on. And follow the other general rules of online etiquette, e.g., don’t post in all capital letters.

10. If you’re in a bad mood, don’t blog or comment. Chances are your bad mood will show through in your writing.

11. Try to respond to comments and posts, unless it’s clearly spam or from someone who isn’t interested in a dialogue.

12. Use good judgment. Remember there are consequences to what you write. If you're about to post something that makes you even the slightest bit uncomfortable, review the tips above and think about why you feel uneasy. If you're still unsure, feel free to discuss it with your team director or supervisor. And always remember: you are responsible for what you post.

Revision 3: July 23, 2013