Editors' Association of Canada/Association canadienne des réviseurs
Social Media Guidelines
Effective date: March 2013

Background
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. Before committing resources to a social media program, the Editors' Association of Canada (EAC) needs 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 guidelines. EAC's direction is to exercise 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.

Purpose
The purpose of this document is to help EAC provide effective social media guidelines for itself, its staff and key volunteers.

Context
Social media guidelines provide a framework for EAC employees' and key volunteers' online behaviour. EAC's social media guideline is a statement of how EAC and its stakeholders will use social media tools and techniques to achieve overall goals.

The guidelines flow from EAC's social media strategy and serve to educate staff and volunteers. Its purpose is to give staff and volunteers guidelines for how EAC expects them to use social media in spaces where members (past, present and future) are, which is everywhere on the Web. Should the social media strategy change, these social media guidelines may need to change as well.

For EAC staff and volunteers, the social media guidelines are personnel guidelines that interface with corporate policies affected by social media, such as Rules and Regulations No. 1: Code of Conduct; Operational Policy 1: Privacy; Operational Policy 3: Conflict of Interest; Operational Policy 4: Confidentiality; and Operational Policy 10: Volunteer Involvement and Recognition. Ideally, the social media guidelines will make interactions on the Web easier, more comfortable and safer for stakeholders, while enhancing their ability to accomplish their work.

Approach
The following characteristics serve as the foundation for the social media guidelines:

- Build on trust by believing that staff and volunteers want to do the right thing. The guidelines are simply guides for behaviour and activities in social media. They focus on how to do social media.
- Apply practicality and reflect on EAC's values and culture. The guidelines are flexible and grant discretion to the employees, as EAC trusts and empowers staff and volunteers.
- Designed to educate, as social media is evolving constantly. The various social media platforms have their own culture and unwritten rules, which are likely different from those

on EAC's website. The guidelines are intended to help our staff and volunteers have successful online interactions.

- Use plain language and avoid the use of highly technical or legal language. Guidelines that are easily understood encourage meaningful and appropriate participation.
- Be friendly and don't have people put off by the guidelines, but make them feel safe and engaged because they know what is expected of them.
- Remain consistent throughout the organization. Different privileges can be granted to different personnel levels but the privileges and expectations need to be consistent for all people within that level. This will help EAC keep social media efforts on course while avoiding accusations of favouritism or discrimination.

Existing Guidelines and Policies
Policies, rules and regulations that currently govern EAC staff, volunteers and members:

- Rules and Regulations No. 1: Code of Conduct
- Operational Policy 1: Privacy
- Operational Policy 3: Conflict of Interest
- Operational Policy 4: Confidentiality
- Operational Policy 10: Volunteer Involvement and Recognition

Deliverables
The following are the official guidelines for social media use on behalf of EAC. While these guidelines are applied to all official EAC social media accounts; staff, members and volunteers are encouraged to review the guidelines for their personal accounts.

EAC expects that all personnel participating in social media on behalf of EAC understand and follow these guidelines, and be aware that they will continually evolve as social media evolves.

Main points for the guidelines:
- EAC will detail its philosophy within its guidelines. Here are some examples:
- *To promote professional editing as key in producing effective communications.*
- *To encourage our members to build relationships, increase learning, share expertise and support collaboration.*
- *To acknowledge our staff and volunteers as ambassadors of our association and brand (online, offline, anywhere).*

Guidelines on personal responsibility:
- It is important to remind all employees and volunteers that they are responsible for what they write and how they participate in social media.
- *Your participation in social media on behalf of EAC is a privilege that should be taken seriously and with respect. What you write, post or contribute is ultimately your responsibility.*

Applicable organizational policies:
- Social media guidelines are only one of many guiding principles within EAC, so the guidelines need to tell staff and volunteers that their online activities are subject to other corporate policies and guidelines.
- *Follow all applicable EAC policies and guidelines. Among the policies most pertinent to this discussion are those concerning privacy, confidentiality, conflict of interest, and the Code of Conduct.*

Confidential information:
- This is an extremely important guideline to cover in social media use. Staff and volunteers are encouraged to think twice before publishing premature information about EAC operations using personal social media accounts.
- *You are responsible for content you post. If you wish to write about a project or operational meeting directly related to the EAC, committees or members, you are encouraged to seek and request clarification from the head of the committee, who is responsible for the flow of information about the project or meeting.*

Intellectual property and links:
- Social media is another form of publishing, so the same intellectual property laws apply. The main issues are copyright, infringement, invasion of privacy, plagiarism and infringement of trademark. The best mitigation techniques are avoiding posting copyrighted material, citing the author when quoting or providing a link to the original content, and requesting permission to use images. Some ways to express this within social media guidelines include:
- *Identify any copyrighted or borrowed material with citations and links.*
- *Evaluate your contribution's accuracy and truthfulness before posting. Be accurate, truthful and without factual error.*
- *Broaden the conversation by citing others and allowing your content to be shared or syndicated.*

Community and value:
- Social media is about building relationships, adding value and creating a community for EAC members.
- *It's a conversation. Talk to your readers like you would talk to real people. Consider content that's open-ended and invite response. Encourage comments.*

Authenticity and transparency:
- It is often unclear to others if an employee or volunteer is acting in an official capacity online, where posting content may imply that it is the official position of the association. To avoid misunderstandings, EAC may suggest staff and volunteers only use EAC's official social media accounts to post or comment on EAC activities. Postings conducted on personal social media accounts are not representative of EAC. Ways of expressing this include:
- *Use EAC's official social media accounts and platforms if posting in an official capacity; otherwise, be transparent and write in first person if posting in an unofficial capacity (i.e. personal account).*
- *Make it clear you are speaking for yourself and not on behalf of EAC. If the posting (including any photo or video sharing) has to do with your work or subjects associated with EAC, attach a disclaimer.*

Exercise good judgment:
- Anything posted online or stored electronically by staff and volunteers can be recovered and may have to be provided to the opposing party. A specific statement on electronic behaviour and discoverability is strongly suggested. Some ways to say this include:
- *Respect the privacy and opinions of members, colleagues and others. Before sharing a comment, post, picture or video about a member, staff or volunteer through any type of*

social media, their consent is not only a courtesy, it is a requirement. Re-tweets excluded.

- *Be respectful. Whether in the actual or virtual world, your interactions and discourse should be respectful. We all appreciate actual respect.*

Write what you know:

- When staff members or volunteers are writing within their areas of expertise, their passion and genuine interest will shine through. Consider having the guideline state this in the following:
- *Ensure you write and post about your area of expertise, especially as it relates to EAC.*
- *Write What You Know: You have a unique perspective on EAC 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 speciality and interests.*

Fixing mistakes:

- It is important to remind staff and volunteers that once the words are out there online, they cannot be retrieved—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. Ways to express this include:
- *When you correct a mistake or modify an earlier post, make it clear you have made a change. Add an update (date specific) to your earlier post.*
- *If you made a mistake, admit it. Be upfront and be quick with your correction.*

Infractions and due process

- EAC staff and volunteers need to know the consequences for violating social media guidelines.
- *We expect all who participate in social media on behalf of EAC to understand and to follow these guidelines. In case of any material or flagrant breaches of these guidelines, EAC reserves the right to remove posting access to EAC's official social media channels.*

Overview of Guidance

Access and posting privileges will be granted to member volunteers by the social media manager or marketing chair.