What is a professional practice statement?
This Professional Practice Statement, developed by the Association Forum, is provided as a management tool for associations and individual association professionals, developed by experts in the industry, and recommended as a means to achieve excellence in managing associations and other not-for-profit organizations.

BACKGROUND
Social media usage is a dynamic method for communication. Social media are media for social interaction, using highly accessible and scalable publishing techniques for web-based technologies enabling interactive rather than one-directional communication between users or between users and organizations through blogs, wikis, internet-based forums, social networking platforms, podcasts and sites that host photos, videos or other user-generated content.

Common social media tools have few costs and technical knowledge barriers. Social media’s ability to facilitate cost-effective and instant communication creates opportunities and risks for associations. Associations should engage social media in a manner that is responsible, respectful, and disciplined, consistent with the organization’s mission, goals and strategies and its representation of the association’s members. The use of social media presents potential risks that should be identified and addressed, including:

- Loss or damage to the association’s brand, image and reputation;
- Misuse by users or inappropriate behavior;
- Lack of control over content;
- Increased exposure to viruses or other “malware”;
- Legal implications related to copyright, trade mark, privacy rights, defamation and antitrust.

There are potential risks in not engaging in social media given the widespread use of these tools. Associations that do not engage in social media efforts risk losing contact and engagement with their members and other important constituencies, and possible loss of ideas and discussion that may come from such efforts and initiatives.

Guidelines for use of social media should be established to minimize these risks while maximizing opportunities to support the organization’s mission.

POLICY STATEMENT
All organizations engaging in social media should develop a policy to guide the association’s establishment and management of social media tools consistent with the association’s mission, goals, and strategies. The purpose of this social media professional practice statement is to provide guidance to the association’s governing body and association executives on the development of effective policies and procedures to minimize unnecessary risk to the organization and which promote the strategic and responsible use of social media.

PROFESSIONAL PRACTICES FOR THE GOVERNING BODY
The use of social media by the governing body should be treated in the same manner as other communication mediums including electronic communications.

- The governing body should be informed of the social media policy for the association.
- The governing body should ensure that the purpose, scope, and management of social media tools by the association are well defined in its social media policy.
- The governing body should be informed by the association professionals of the risks and opportunities for using social media and how those initiatives will support the strategic goals and mission of the organization.
PROFESSIONAL PRACTICES FOR THE ASSOCIATION PROFESSIONAL

Association professionals should define and manage a social media policy consistent with the guidance of the governing body and the mission, goals, audiences and strategies of the association.

Important questions to be answered include:

• What is the purpose of the association’s involvement in social media relative to the mission, goals, audiences and strategies of the organization?
• What is the audience for the association’s involvement in social media?
• What are the business goals for the use of social media tools by the association?
• What are the business strategies for introduction, adoption and use of social media tools for targeted audiences?
• How will the association’s use of social media tools be integrated with the association’s overall marketing and communication strategy?
• How will conflicts over the use of social media tools between users or between the association and users be resolved?
• What risks will the association face if it does not engage in the use of social media – for example, the risk of losing connection or contact with members who do; the risk of not being involved in or aware of issues being discussed by members; and the risk of being unresponsive to an important medium of the members.
• Who is authorized to speak for the association in various social media outlets? How can personal opinion be identified versus company position? Can the association encourage both a personal social media presence by staff in addition to the professional association presence?
• What terms of use should be established for association-sponsored social network sites outlining legal ownership of content, appropriate legal disclosures, and definitions of acceptable user behavior?
• What are the consequences of a violation of the association’s policies?
• How will the association scan social media networks to ensure its brand is protected?

Where content is user-generated, the terms of use for an association-sponsored social network site should include the following:

• Guidelines on the submission of content by users;
• Disclosure of the association’s right to monitor content and user submissions and to administer the use of social media tools in accordance with association policies and relevant local, state and federal law;
• Policies for the protection of user privacy consistent with local, state and federal laws;
• Disclosure of site and content ownership;
• Disclosure of any warranties or disclaimers of the association;
• Disclosure of limitations on the association’s liability for the site; and
• Guidelines for users on appropriate site content and procedures for users to request removal of offensive material.

The association professional responsible for developing the association’s social media strategy should develop a business plan for the association’s use of social media, addressing such topics as:

• Describing how the use of social media tools is consistent with the mission, audiences, goals and overall organizational strategy of the association.
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- Defining the business goals of the social media strategy and specific metrics to measure the success of the association in achieving these goals;
- Defining how volunteers and staff should act on personal social media accounts that is consistent with ethical practices (e.g., the Forum’s Ethical Behavior Professional Practice Statement);
- Defining the initial investment and ongoing operational costs of social media tools and identify funding sources to support this investment;
- Identifying staff responsibilities for administering and overseeing association social media tools;
- Identifying the marketing strategies and tactics designed to create adoption and support the ongoing use of social media tools by targeted audiences consistent with the association’s business goals;
- Specifying how the association will monitor association data and content through social media tools;
- Establishing a social media “listening” process and/or policy to effectively capture meaningful insights and content that could be beneficial (or detrimental) to the association; and
- Identifying the reports to the governing body and relevant executives communicating the status of social media use consistent with the mission, audiences, goals and strategies of the association.

The association professional should consult with legal counsel experienced in the use of social media tools for guidance and to conduct periodic legal reviews as social media use by the association changes.

DISCLAIMER

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