Case Western Reserve University

Social Media
Guidelines

Introduction

Social media has become ubiquitous in our personal lives, and it can be an invaluable tool in our professional lives, helping us spread the word about groundbreaking research, exciting university news and upcoming events.

But it's also constantly changing. What's effective one day may not work the next based on the latest algorithms; what was once your most-visited platform now gets far less traffic, even though your tactics haven't changed.

We're here to help—well, as much as we can. We can't, for example, make Facebook stop changing its algorithms. But we can help you unlock the puzzle of what's good to post, what's ineffective and what may be downright illegal.

What follows is a roundup of social media strategies, policies and best practices for members of the Case Western Reserve community, for their personal accounts and the ones they manage for the university.

There's a difference between your personal and professional use of social media, of course. We've laid out guidelines for both, but two rules exist no matter your role:

1. Think before you tweet (or post, or snap, or pin). Social media is a public forum—no matter how secure your privacy settings or what platform you use. Someone can take a screen shot of your posts (or otherwise share them) in a matter of seconds. Even if you delete the post, the damage already could be done. Be 100 percent certain you are comfortable with your post—and that you would be OK with colleagues, prospective employers or even your parents seeing it. Because, trust us, they can.

2. If in doubt, leave it out. Wondering if something is too private to share? If you have to question it, don't post it. Never share confidential, personal or proprietary information about Case Western Reserve University, its administration, students, employees, alumni or donors on social media. (Even on your personal account, don't post anyone's private information without his or her permission.) That includes photos of people whose permission you have not received to post publicly. Use your best judgment and follow university policies and federal requirements.

Policy for Official Social Media Accounts

Official social media accounts are accounts that University Marketing and Communications authorizes to represent the university through social media.

Anyone managing or contributing to an official social media account must follow this policy concerning that account. This includes anyone managing or contributing to a social media channel on behalf of a school, department, office or other official entity at the university. Personal opinions should not be expressed through official social media accounts.

The Policy for Official Social Media Accounts only applies to posts on official accounts. It does not apply to interactions individuals may have on their personal social media accounts—as long as such communications do not indicate that the individual is speaking on behalf of the university. And, of course, best practices always apply, no matter where posts appear.

This policy does not apply to student organizations. Organizations should follow the guidance of their governing bodies and, when necessary, the direction of the Division of Student Affairs. Those student organizations that use the university's logo must not manipulate it in any way. In addition, the university reserves the right to monitor and restrict how its logo and name are used.

This policy applies to all social media platforms, including but not limited to Facebook, Twitter, Instagram, Snapchat, Google+, Tumblr, Pinterest, and blogs. It is meant to be a living document that will transform as technologies change.

Account Registration

Accounts created prior to February 2017 must register with UMC by Feb. 28, 2017. After February 2017, social media managers must register new accounts with UMC prior to being created. This policy applies to every social media platform.

The process of registration begins with a request to University Marketing and Communications (UMC) to become an authorized social media representative. University Marketing and Communications reserves the right to determine what accounts are deemed "official" and, as such, can use the university's name, logo and otherwise speak on behalf of the university.

To register, you must complete a form that includes:
- the name of the account (proposed or existing),
- URL (if existing),
- contact information for the account administrator and a backup administrator,
- a brief overview of your goals, audience, strategy and measurements for success, and
- an exit plan—meaning, if you need to remove your account, how will you do so?

Users also will be required to update (or maintain) the account administrator contact information every six months, to ensure continuity. In addition, you must agree to abide by the crisis communication guidelines.

Crisis Communications
In the event of an emergency, Case Western Reserve University must communicate a unified message across all channels. Social media pages increasingly are among the first places community members go for details on an emergency, what is being done, and what they should do to stay safe. They often will look for Case Western Reserve-related pages on Facebook and Twitter, searching terms such as "Case Western Reserve University," "Case," "CWRU," etc.

Therefore, those who open or run a social media account that bears any named relationship to the university (i.e. contains the name "Case Western Reserve University," "Case," "CWRU" or the like), users must agree to:
▪ immediately update the page with approved messaging only from Case Western Reserve's official Facebook and Twitter accounts (if updates are possible),
▪ not spread rumors or hearsay, and
▪ share critical information seen on social media with representatives from University Marketing and Communications.

Social media outlets, including Facebook and Twitter, require account administrators be "authorized representatives" for the pages they maintain. Only administrators who have agreed to this protocol will be "authorized representatives" for Case Western Reserve University pages. Failure to comply with this policy may result in closure of the social media page or account.

Facebook Business Manager
Facebook accounts using the university name, logo or representing Case Western Reserve in an official capacity must use Facebook Business Manager (business.facebook.com) and add a representative from University Marketing and Communications as an account administrator on their Facebook pages.

Though you still will be responsible for following the crisis communications guidelines—and for posting and monitoring all of the content on your page—this will help ensure continuity on your page in the event an account manager leaves the university. Rest assured, UMC will not try to "control" your page or post updates; this is simply another outlet to ensure that, if offensive posts are added to your page, there is an additional way for them to be removed, and to provide continuity if there is turnover within the department.

Contact **socialmedia@case.edu** for more information.

Relevant University Policies and Procedures

Social media usage is governed by the same policies that govern all other electronic communications. Read the following policies before using any social media.

- Acceptable Use of Computing and Information Technology Resources Policy
- Conflict of Interest Policy
- Faculty Senate Handbook Professional Responsibilities (Academic Freedom)

Advertising on behalf of external vendors is prohibited on Case Western Reserve University websites and social media presences, with the exception of Case Western Reserve University Athletics, through its media rights provider.

All social media sites have policies and terms of service that should be reviewed and agreed to before use.

Confidentiality
Do not post confidential or proprietary information about Case Western Reserve University, its administrators, students, employees or alumni. Follow all university policies, federal requirements—such as HIPAA and FERPA—and NCAA regulations.

Privacy
Do not discuss a situation involving named or pictured individuals without their permission. A good rule of thumb: If you wouldn't present the information in a public forum, don't post it online. Follow all university policies and guidelines on the appropriate handling of student, employee and patient information.

Liability
Individuals are responsible for what they post, whether on personal or university-affiliated accounts. As such, they can be held liable for posts deemed to be copyright infringement, defamatory, proprietary, libelous or obscene. Verify all information as fact before posting, and cite and link to sources if appropriate.

Accessibility
Case Western Reserve is committed to ensuring that digital materials are available and accessible to all members of the campus community, including individuals with disabilities. Social media administrators should take steps to reduce barriers to access for individuals with disabilities by, for example, enabling screen-reader compatibility, captioning videos and adding descriptive tags on images. Most major social media platforms provide access solutions for individuals with disabilities, but all administrators must do their part to alleviate any barriers.

Copyright
When using photographs or graphics, repurposing content or sharing information, be mindful of copyright and fair use laws. Images cannot be "taken" off the Internet without explicit permission from

the owner. Individuals must secure permission when including copyrighted or trademarked material and include a permission statement or disclaimer, as required by the owner. For more information, visit the U.S. Copyright Office at copyright.gov.

Trademark
The university retains a trademark on its name ("Case Western Reserve University") as well as other iterations, including "Case" and "CWRU," and the phrase "think beyond the possible." Use of these terms in account names or bios could be a trademark violation if used to misrepresent the university.

Once an account is designated by UMC as "official," it is considered an authorized representative of the university; as such, administrators can use the university's name in materials, as long as use is consistent with this policy.

The university's logos also are trademarked and can be used only by authorized social media accounts. UMC has created a suite of approved social media icons in appropriate sizes. Email socialmedia@case.edu to request one.

Political Statements
Political statements (whether in text or visual form) generally should not be made on official accounts. As a tax-exempt organization, the university is prohibited from participating in a political campaign on behalf of or in opposition to any candidate and is subject to other requirements. To ensure that the university does not run afoul of these rules, anyone seeking to post a political statement on an official account must first submit the statement to UMC for review and approval in coordination with other offices.

Photography Usage
Per section 2741 of the Ohio Revised Code, higher education institutions are permitted to use an individual's photo without explicit permission if both of the following apply:
- The individual is or was a student at, or a member of the faculty or staff of, the institution of higher education.
- The use of the individual's persona is for educational purposes or for the promotion of the institution of higher education and its educational or institutional objectives.

University accounts must include a statement somewhere on their social media pages that explain who to contact if an individual wants his/her photo removed from the page.

Passwords
When it comes to social media accounts, the level of password security varies; some accounts are tied to personal logins, while others allow a separate login and password.

All passwords for social media accounts—even if connected to a personal account—should be updated every 180 days (once per semester), per the university's password policy. In addition, passwords should meet the same complexity standards as outlined by University Technology:

1. Must contain eight or more characters
2. Must include at least three of the following:
   - Uppercase letters
   - Lowercase letters
   - Numerals
   - Punctuation
3. When using common dictionary words, no more than four consecutive letters can be used.

Passwords should be changed immediately when an individual with access to your account leaves the department/organization/unit. All passwords should be stored securely in a password management tool, with access granted to or removed from individuals as necessary.

Changing passwords regularly helps protect from hacking, identity theft or other security risks. It also helps ensure that unauthorized users cannot gain access to accounts, and mitigates overall risk.

If users have any questions about password recommendations, email **socialmedia@case.edu**.

Inactive Accounts
Social media accounts must be regularly maintained and updated. University Marketing and Communications recommends Facebook pages be updated at least three times per week, and Twitter no less than once per business day. An abundance of inactive accounts reflects poorly on the communications strategy of the entire university. Therefore, accounts that have been inactive for more than two months may be subject to deactivation or deletion.

Representatives from University Marketing and Communications will periodically monitor accounts for activity and contact the appropriate administrator (or backup) to discuss inactivity.

Please note: Accounts won't be automatically removed; University Marketing and Communications first will contact the administrator (and back-up administrator), followed by the leader of the department, unit or organization, to discuss options before deactivation.

Deleting Accounts
If you want, or are asked, to remove a social media account, please take the following steps to ensure no data is lost in the process:

On Facebook
1. Go to Account Settings
2. Click "General" in the left-hand column
3. Click on "Download a copy of your Facebook data"
4. Click "Start My Archive"

Following these steps provides a record of posts you've shared, lists of fans and general Facebook activity.

On Twitter
1. Go to "Settings"
2. Under "Account," click "Request Your Archive."
3. Download and save the file emailed to you

This provides a record of your complete Twitter activity for future reference.

Policy for Personal Social Media Accounts

Employees' incidental use of social media in the workplace is permissible as long as their supervisor determines such use does not interfere with operations or productivity, or violate official policies set by their department or the university. Case Western Reserve reserves the right to monitor the use of its computer systems, and disciplinary or other action may be taken if an employee's online activity is deemed to violate any of the above-listed criteria. These include but are not limited to university policies regarding employment that address misconduct and unacceptable behavior.

Sharing University News
Individuals are encouraged to share university news via social media platforms. However, when personally posting about or responding to university-related content, be upfront about your identity. Disclose your affiliation. Clearly state your role and your goals in posting the news. But also do not make any statement that suggests you are speaking on behalf of the university.

Sharing Your Opinion
If posting personal comments on an account through which you mention an affiliation with the university, please state that you're voicing a personal opinion, not representing Case Western Reserve University, its administration or any other community members. For example, if you want to tweet regularly about higher education news and affiliate yourself with Case Western Reserve, you could put in your bio that the views and thoughts expressed are your own and do not reflect the views of CWRU.

Individuals always should use good taste, common sense and a professional tone when participating in an online discussion—especially those regarding the university.

What Do We See?
Case Western Reserve does not monitor individual social media presences unless required by legal or other university policy. In the event the university becomes aware of an interaction that violates university policies, the university reserves the right to take appropriate action.

Please note: At this time, the university must follow individuals on Snapchat in order for CWRU's "stories" to be seen. We will not watch your story unless specifically asked by you, or required by legal or other university policy. If you send the university personal messages, these will be reviewed and considered for publication via the university's main Snapchat account.

Best Practices Make Perfect

More and more, social media is our first (and closest) contact with our audiences. But audiences' attention is fleeting; you only have a few seconds to make a great impression. Use these tips to guide you through the social sphere—and make your followers listen to what you have to say.

- **Get approved.** If you're acting as the voice of your unit, make sure your boss is on board with what you're saying. Then, you'll need to register your account with University Marketing and Communications.
- **What's your name?** Be sure your handle not only makes sense but also accurately reflects your relationship—or lack thereof—with the university. On Twitter, you'll want to keep it short; if referencing the university in your name, use "CWRU" instead of "Case" (which, by the way, should only ever be used in reference to the Case Institute of Technology). On Facebook, your accounts can be better found if you include "CWRU," "Case Western Reserve" or "Case Western Reserve University" in it. And, as always, please remember: Our name is Case Western Reserve University, Case Western Reserve or CWRU. Other iterations do not accurately reflect the institution or its history. UMC will approve all names.
- **Be accurate—but correct your mistakes if they happen.** It's crucial to ensure you have the details straight before you post a status update or send a tweet. But no one is perfect. If you make a mistake, fess up. Correct any inaccuracies or errors in a quick, upfront manner. Make it clear—whether in follow-up posts, comments or replacements—that you're aware of the error and have made the appropriate corrections. Your honesty and diligence will help you become a trusted voice in the social community.
- **Transparency is the best policy.** When you're managing an account for a department or unit, usually no one knows exactly who you are. But it's OK to let your community members know they're interacting with a real person. You don't have to state your name and title every time you post, but if someone asks, tell them! And remember: Because they don't know who you are, they view your posts as coming from the university. What you say directly reflects on all of us.
- **Have something to say.** You must have enough relevant content to post regularly; we recommend at least three times per week on Facebook, once per day on Twitter and a few times a month on Instagram. Notice we said "relevant content." Don't inundate your followers with information that doesn't affect them. That's not a way to gain—or keep—fans. If you don't have enough to post, it's time to rethink your social media strategy. (Contact us. We can help.)
- **What's your response?** You should (usually) have one. Social media is at its best when it fosters a dialogue. Build your community by allowing—and encouraging—your fans to ask questions and providing them with answers.
- **Be timely.** In order to successfully manage social media pages, an administrator should check the accounts at least once daily (ideally more often) to respond to questions or comments.
- **Don't censor.** Case Western Reserve University is committed to demonstrating respect for diversity of thought, ideas and opinions. Allow open discourse about relevant topics, even if subjects disagree with one another. We do not censor, even if the content reflects unfavorably on the university. (Only content that is factually incorrect needs to be addressed.) Speech that is obscene, threatening,

abusive or illegal in any manner, however, is unacceptable and must be removed immediately. As administrator, it is your responsibility to identify the offending user and report him/her to the social media platform administrators. You may want to take a screen capture of the offending materials for future reference.

- **Know when to step in.** Discussions can turn heated or even inappropriate or offensive. You don't need to step in at every critical statement, but keep a close eye on the conversation. Sometimes you'll have to be the moderator; a few quick reminders to be civil might do the trick. Other times, your community members will do it for you. Avoid being confrontational or a censor, and stick with your tone and intent of your social media strategy. And, above all, protect the rights of your users.
- **Be a user.** If you don't experience the tools as a regular fan, you'll never maximize your ability to use those tools as a communicator. Being active on social media allows you to see what others do well—and then do it one better.
- **It's a conversation.** Your fans are real people. Talk to them like they're in the room. Nix the fancy language and, instead, show your personality, develop a rapport and encourage discussion.
- **Give generously.** Your fans made the effort to find you. Reward them. Make them feel special with exclusive content, advice, thought-provoking questions and games. Allow them first access to announcements or events. Give them a reason to care about your message.
- **Anything short of awesome is spam.** Put yourself in the "fan" seat and evaluate if you'd actually want to read it. If you're not interested, you'll just bother them—and you'll lose them.

What to Watch for (and When)

Social media gives you a unique opportunity to interact with your fans and create connections—not just send out a message and never follow up.

But how can you do that if you're not watching the conversation? To be a good social media member, you must monitor your accounts regularly.

A few tips to do so:

- Set up an account on a social-media-monitoring site, such as HootSuite. Here, you can watch the activity on all of the social media accounts you manage, as well as track when people are talking about certain phrases, such as "CWRU."
- You also can sign up for fee-based monitoring services that email you at least daily with notifications on when you've been mentioned on social media. For more information on recommended services, contact **socialmedia@case.edu**.
- Log in to your accounts multiple times per day—especially right after you've made a post—to see how and if people are responding. If they're asking questions, answer them! If they're giving you compliments, thank them (or like/favorite their messages)! If they're being negative…well, you may choose to respond, or not. See our response flowchart for our suggestions on when to engage—and when to steer clear.
- Are you going on vacation or out of the office for a few days? Make sure a backup administrator is monitoring your accounts and has the power to respond appropriately.

Going Mobile

Mobile devices allow you to be connected nearly any time at any place. Which is great—except when it's not.

Having your university-affiliated accounts linked to your mobile device can be a positive: You can respond to comments immediately and keep tabs on what's happening. But it also can be dangerous: You think you've switched from the university's Twitter page to your own account and go to make a personal post...only to have it show up on your CWRU-affiliated page. This can quickly damage the university's brand—not to mention your own image within your department.

Mistakes happen, but if we can mitigate the potential of them occurring, we prefer to. University Marketing and Communications recommends you do not post from your mobile device to an Official Social Media Account unless absolutely necessary (in case of a crisis, for example) or unless it's a mobile-based platform, such as Instagram, or runs through a separate app, such as Facebook Business Manager's Facebook Pages.

Identifying Inappropriate Accounts

Though University Marketing and Communications attempts to track accounts affiliated with the university, this is a nearly impossible task. As such, we ask that all members of the campus community are good brand stewards and keep an eye out for accounts claiming a Case Western Reserve connection.

Some ways in which accounts may misrepresent a relationship with CWRU include use of:
- our logo (official or modified)
- the university name (or some version of the university's name, including "Case," "Case Western," "Case Western Reserve," "Case Western Reserve University" or "CWRU")
- our tagline ("think beyond the possible")

If you come across an inappropriate social media account—or simply one you're questioning—please notify University Marketing and Communications immediately at socialmedia@case.edu. If necessary, we then will contact the Office of the General Counsel to discuss appropriate next steps.

Remember: It's out there.

Anything you share on social media is public. It can be shared, stored and spread globally. Don't post anything that you would not be comfortable having shared with your colleagues, parents or even strangers.

Our Social Media Strategy

Social media provides a multitude of opportunities to share the Case Western Reserve message and improve our brand recognition. But with opportunity also comes potential failure. Without a unified social media strategy, Case Western Reserve will present a conflicting appearance, which could lead to issues such as loss of confidence in the information coming from the school, department or program.

This social media strategy, which guides the main Case Western Reserve accounts, is part of a larger overall communications strategy from UMC and other units.

Of course, every account on every platform should have its own strategy, its own voice and its own message to share. We don't have to share the same stories (how boring would that be?), but we do need to have overarching goals that allow us to individually, in our own unique way, tell our collective story.

Through our use of social media, we aim to:
- Communicate our key messages to a broad audience.
- Enhance the reputation of Case Western Reserve by promoting appropriate, relevant content.
- Protect the university's reputation if misinformation is spread.
- Create a dialogue among our audiences.
- Foster a sense of pride in being part of the Case Western Reserve community.
- Inform and educate our audience in interactive, engaging ways.
- Improve consistency in social media style across the university—while encouraging personal tone, voice and messaging to meet each constituency's needs.
- Grow Case Western Reserve's social media presence to become a major part of the university's communication strategy.
- Meet our audiences' wants and needs by analyzing metrics and mentions to see how we can better tailor our strategies.
- Implement best practices across all social media platforms.
- Build community and goodwill.

Why Should (or Shouldn't) You Use Social Media?
Social media can be a powerful tool to disseminate news, connect with audiences and build a sense of community. At Case Western Reserve, we fully support the use of social media by schools and organizations—as long as there is a clear strategy behind it.

You see, social media alone isn't a marketing plan; it's just one of many effective outlets necessary for a successful integrated marketing and communications plan.

So before you get create a Facebook page for your department or launch a blog for your event, you need to think strategically. Ask yourself—and your supervisors—the following questions:
- How can social media help us meet (and exceed) our goals?
- Is social media the appropriate channel for reaching our audience(s)?

- Who is our audience(s), and do they use certain social media channels?
- Which platforms or tools will be most effective?
- Do we have the resources for content development, execution and long-term maintenance?

Perhaps the most important question, though, is simply: Do we need a social media account?

If you don't have news and information to post regularly (we recommend at least three times per week on Facebook, a few times a month on Instagram and once per day on Twitter, for example), then you likely do not need your own social media account.

Instead, please share your information with University Marketing and Communications to consider for its vehicles. We have built a large following on our official social media outlets and are always looking for more information to share and ways to showcase our wide-ranging university community. But we can't post what we don't know, so share with us! Email **socialmedia@case.edu** with your ideas.

Get Started

Now that you're through all of this, you're probably itching to get rolling on creating (or updating) a stellar social media campaign.

Once you've outlined your social strategy and set goals for each account, visit case.edu/umc/marketing/socialmedia to register your account(s).

Want more help? We're here! Email **socialmedia@case.edu** to find out how we can assist.

Connect with us.
Follow Case Western Reserve University's official social media accounts:

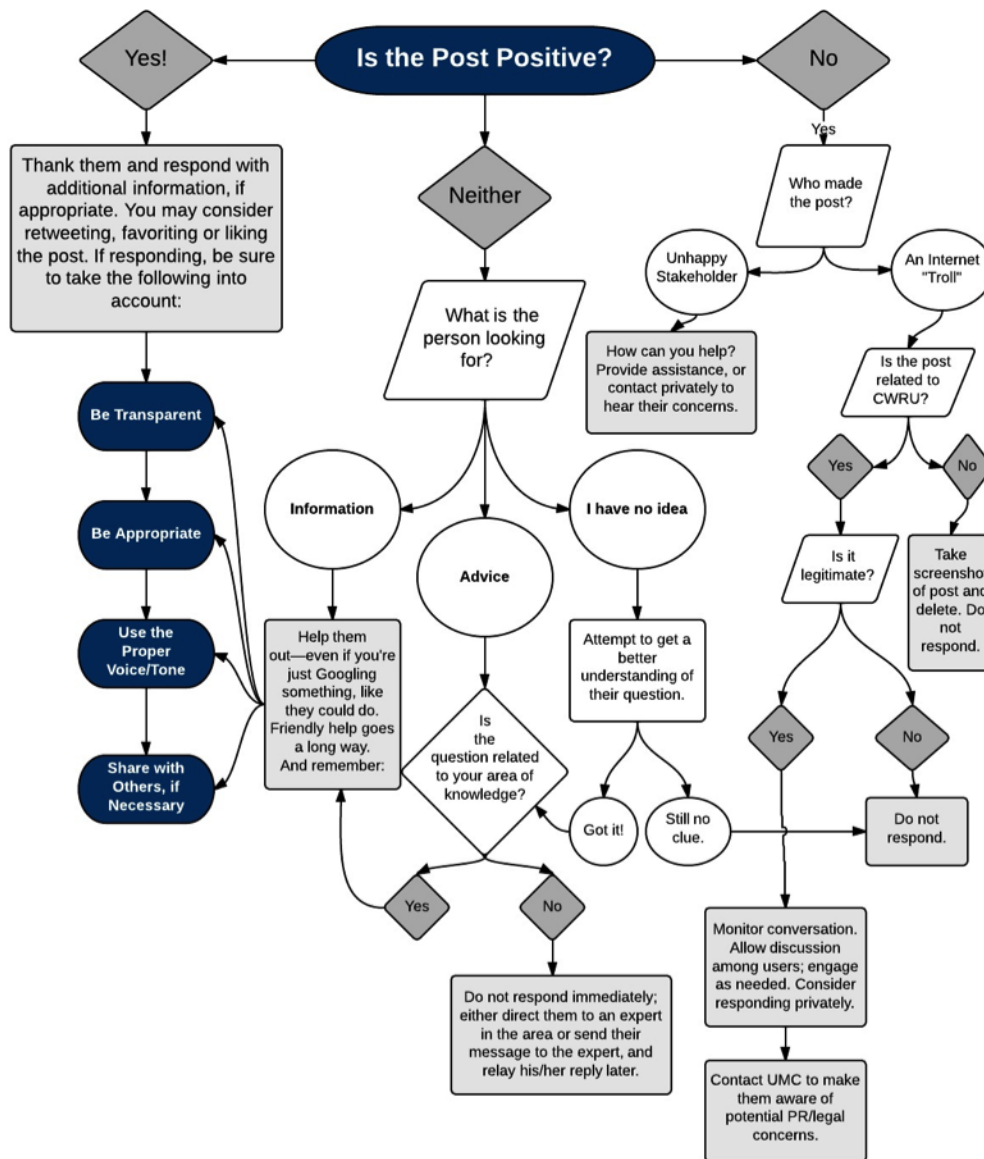**Facebook:** facebook.com/casewesternreserve
Twitter: twitter.com/cwru
YouTube: youtube.com/case
Instagram: instagram.com/cwru
Snapchat: cwruniversity

Appendix A: Social Media Response Guide

CWRU Social Media Response Framework

Appendix B: Health Sciences Guidelines

In addition to the university's general social media policy and best practices document, schools and administrative units related to health sciences—such as the Frances Payne Bolton School of Nursing, the School of Dental Medicine and the School of Medicine—should adhere to the following guidelines.

Protecting Privacy
First and foremost, it is never permissible to share patient information under any circumstances. All Health Insurance Portability and Accountability Act (HIPAA) rules apply on social media.

In addition, do not share information about patients' families, as well as faculty, staff or donors, without obtaining proper permission from them or the school's marketing and communications office.

Communicating with Patients
Providers must not communicate with patients via social media sites; instead, providers must redirect patients to clinical practices so no medical advice or protected health information is communicated to a patient via social media.

If a patient or family member posts complaints about service or other issues, review and follow the Social Media Response Guide.