



THE UNIVERSITY *of* EDINBURGH

Social Media Guidelines

for staff and researchers

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1. Overview, why we need social media guidelines

Social media has permeated most areas of our life online since the mid-2000s. It empowers every web user to engage, get involved, have their say, with little or no technical knowledge. This has been an incredibly liberating experience for the majority, opening up a wealth of interaction and opportunities.

But with these opportunities come risks; both to the individual and to any organisation they represent.

Here at the University of Edinburgh, we positively encourage you to engage, collaborate and innovate, using the wealth of social media opportunities that continues to grow on an almost daily basis. However and wherever you do this, we want you to be aware of your actions and engagements – their potential impact on both yourself and the university you represent.

This guide will help you steer a safe and responsible path.

Please read the sections that relate to your social media activity - you may be the owner inviting interaction, or you may just be contributing – and keep it to hand for future reference. This paper gives an overview of the main points to bear in mind when using social media for professional purposes. Much of the guidance relates to legal obligations you have as a University employee.

The use of social media includes posting direct content or comments on eg:

- Facebook
- Google+
- Twitter
- Personal blogs
- YouTube
- News and opinion articles
- Discussion boards

However, we recognise that the number of social media channels and the way in which people interact with them is constantly growing and changing. Please consider this guidance for any online content that you create outside the University website.

Below are some quick dos and don'ts for producing social media content. Section 2 then gives more detailed guidance on how you as an individual should approach creating social media content about the University or related issues.

Section 3 provides guidance for any unit that wants to host its own social media presence, although a lot of the guidance given in section 2 applies here, too.

Sections 4-6 provide links to other guidance and useful resources.

1.1. General guidance – personal participation

Do ✓	Be aware of how your comments may reflect upon the University or the project or service with which you are associated.
	Remember Data Protection and Freedom of Information legislation and requirements.
	Always credit the source when using links.
Don't ✗	Don't post potentially discriminatory or bullying material
	Don't post any commercially confidential or sensitive information .
	Don't use your personal presence as the first point of publication for any official reports or announcements.

1.2. General guidance – Hosting a presence

Do ✓	Always obtain approval for any new social media presence
	Always appoint a main contact person for your presence.
	Make sure you offer an equal level of service for members of our audiences who find social networks inaccessible.
	Regularly moderate comments , and agree a mechanism for handling these.
	Take care with branding and use appropriate URLs and usernames.
	Link to official sites .
	Be transparent about who is contributing .
	Publish regularly and relevantly .
	Always check the Terms & Conditions of any provider.
Remember people may submit a Freedom of Information request through social media channels and we are legally required to respond.	

1.3. Good practice

Do ✓	Stay relevant and interesting to the expected audience.
	Be respectful to all parties.
	Engage with stakeholders and link or refer to others' relevant content.
	Ensure that any negative comments or criticisms are balanced .
	Consult your supervisor/manager about any difficult or sensitive topics .
Follow the principles of writing for the web .	

2. Personal participation in social media

2.1. Introduction

This guidance is to help you think about how you as an individual blog, microblog or otherwise produce social media comments about the University, projects, services or technologies associated with the University, or your professional colleagues and contacts. This mixture of personal and professional identities can be complex and raise unexpected issues.

The guidance in this section, particularly regarding tone and appropriate content, also applies to Section 3 *Building an official presence*.

The University doesn't provide guidance on how you communicate on a personal basis about any other topic.

2.2. Personal responsibility

The University of Edinburgh is your employer and as such **you have a legal and moral responsibility not to bring the organisation into disrepute**. Maintaining the reputation of the University, its projects, services and staff plays a crucial part in ensuring the continuing success of the organisation. Comments, particularly those with a strongly negative or unprofessional tone, can have serious unintended consequences. It is therefore important to remember that what you say about your work, even in personal social media presences, can reflect upon the University.

Please exercise discretion over whether or not the space you are posting to (whether your own or as a guest post on another person or organisation's blog or social media presence) is an appropriate space for discussion of work or work-related matters. If in doubt, you can always ask your supervisor/manager for advice.

Please do not comment about University matters in any social media space which could be construed as offensive or illegal.

2.3. Disclaimer

If you are commenting on University related matters please remember that you are voicing your own personal opinions and ensure that (where possible) you include a statement that indicates that:

"The views expressed here are the author's own and do not represent the views of the University of Edinburgh."

If you post on a fairly regular basis about the University, University projects and services, or particular technologies or areas of interest that reflect on your professional role at the

University, consider adding the disclaimer to a fixed element on your blog (for instance in the sidebar or footer).

If these posts are the main content of your personal blog or social media presence, consider whether an official University social media presence would be a more appropriate space in which to post.

2.4. Deciding what material can be blogged or commented on

- It is usually appropriate to mention and **refer your readers to published or public material**. Adding your own comments and discussion of this type of public information is acceptable but you should always be respectful in tone and it should be clear that your views are your own.
- You **must not post any commercially confidential information**. This may include:
 - research that is not yet in the public domain
 - indications of forthcoming developments or funding bids
 - data or software code
 - information about colleagues or personnel matters
 - unresolved grievances
 - non-public or not-yet-approved documents or minutes, news or information.

If you are in any doubt about whether it is appropriate to blog or post a comment about something please speak to your supervisor/manager for clarification.

- Your personal blog or social media presence **should not be the first point of publication for any official reports or announcements**. Official materials should always appear first on an official University space – usually the University website, the project or service website or the appropriate official project or service blog, microblog or appropriate official social media presence.
- If you are sharing links to already-public works like publications, websites, annual reports, project blogs etc, **please ensure that you credit them appropriately**. Please also include a link back to the University website (and/or the project/service site) in your posting so that your readers can find out more.
- If you are in any way unsure about whether an item is public or publishable **refer to your supervisor/manager** for advice before you blog or comment about it.

2.5. Comments about the University on your social media presence

It is up to you if/how you moderate comments on your own blog, website or social media presence. However, we suggest that with your head of unit, **you agree a mechanism for**

handling any questions or notable comments about the University or the University's projects or services.

Notable comments might include those that are:

- excessively critical in tone.
- queries or comments that may require a support response or indicate an issue (e.g. unexpected downtime, broken links, bugs) with a service or project.
- very positive or supportive in tone and would benefit a wider audience such as your colleagues or project/service funders. These comments may also help inform the planning of outreach or promotional activities.

Where these comments occur (particularly queries and reports of bugs or downtime) it may be appropriate to reply privately or publicly with the email address and/or phone number of the relevant helpdesk, school office or support service. It may also be appropriate to indicate that the relevant contact point should be the first point of call for questions or urgent support issues.

A flowchart is supplied in section 6 to help deal with comments.

2.6. Comments you make on other social media presences

If you are commenting on other project, service, or personal/professional blogs in a personal capacity please be aware of how your comments may reflect upon the University or the project or service with which you are associated. Whilst an open discussion of ideas and technologies is encouraged, you should also remember that your personal identity might well be associated with your professional role in many social media contexts.

As with posting to your own social media presences:

- You must not post any **commercially confidential** information.
- You should **refer any notable posts** or queries to the relevant helpdesk.

2.7. Legal considerations

- **Check the Terms & Conditions and/or Usage Policy** of any service to which you subscribe.
- Be mindful of your responsibilities under Data Protection legislation - **do not disclose other people's personal information without prior permission.**
- Be aware that any posts you make in a professional capacity (even private posts) are subject to data protection and freedom of information and may need to be disclosed.
- **University policies apply:** see section 5 *University policies* at the end of this document for links to the most relevant ones.

3. Building an official presence

3.1. Introduction

This guidance is to help you set up and run an official social media presence.

If you are writing about the University or your work on a personal social media presence, please also see section 2 *Personal participation in social media* guidelines above.

Blogs, microblogs and other social media tools offer greater flexibility in terms of content, tone and timeliness compared with more formal websites and newsletters. They are a less formal and more discursive way to communicate between project or service teams and users or stakeholders. However, **these presences are public records and are subject to data protection and freedom of information requirements**, so you always need to bear in mind that you are representing the University when you post and interact in these spaces.

3.2. Set-up

Approval

Consult with your supervisor/manager and obtain their approval for any new social media presence.

- Supervisors/managers should subsequently be provided with login and password details to ensure continuity of access/posting.
- Speak to the social media officer at EDINA (via websiteproject@ed.ac.uk) who can give you advice to help you get started.

Contact

- **Appoint a member of the team**, project or service to be the main contact point for your presence.
- This person will be responsible for **maintaining a common editorial line and regularly moderating comments**.

Branding and identity

If you have negotiated a contract with the provider of your social media presence and the contract includes the data protection contract clauses specified on the Records Management Section website:

- Use usernames and URLs which are consistent with tone and scope.
- Use project/service logos and colours, University and funders' logos.
- Speak to Communications and Marketing for guidance on the use of the University of Edinburgh crest. See the University brand guidelines: <http://bit.ly/bzLxwl>
- Ask the IS Multimedia team or other design professionals for help with creating appropriately branded images, logos and backgrounds.

If you do not have a specific contract with the social media provider, ensure that users are aware that your presence is hosted by a third party and not directly by the University. For example, ensure that:

- The presence retains the branding of the third party provider.
- Use of the service is optional.
- Users sign up to use the service directly with the service provider, and not through the University.

Profile

- It is important to ensure the social media identity relates back to the appropriate project, service or team.
- Be transparent about who is contributing to your social media presence, including real names and job titles whenever possible.
- If several people are editing a service/project blog it may be appropriate to list all of those involved.
- Ensure that any associated user profiles feature
 - the name and role of the contributor
 - suitable images
 - links to project/service pages.

3.3. Posting

Please see the table in section 3.5: Updating your social media presence.

Tone and authenticity

- Be appropriate and professional in presentation and tone.
- Use any necessary disclaimers (for example, if your blog does not necessarily represent the views of all project partners).
- Include a labelled link to the University website.
- Ensure that you include the following text (linked to the University website) in the footer of your social media pages:
"The University of Edinburgh is a charitable body, registered in Scotland, with registration number SC005336."

Frequency

- By setting up a social media presence you are committing to maintain it, so publish regularly and relevantly.
- See section 3.5 below *Updating your social media presence* for more information about content and presentation.
- If a social media presence, particularly a blog or microblog, is not being updated regularly, then the best course of action may be to:
 - Formally cease updating it, and post a final comment that indicates that it will no longer be updated.

- Take a copy of your posts for archiving and, in some cases, subsequently remove the presence.

3.4. Accessibility

- When communicating via social media networks, we need to be prepared to offer a similar level of service to members of our audiences who find these technologies inaccessible, when they request it. This might include summarising online dialogue via email and facilitating contributions, or providing subtitles or transcripts to video or audio footage.
- Social media use isn't a substitute for having all core content on a professional, accessible website. Using a social media channel as your only means of communication means you risk cutting off a section of your target audience.
- Commitment to accessibility of information and services applies in the realm of social media, just as it does in all other areas of the University's activity.

3.5. Updating your social media presence

<p>✓ DO</p>	<p>Stay relevant and interesting to the expected audience</p> <ul style="list-style-type: none"> • Postings about broader issues may be relevant, but postings about other projects may be of less interest to the audience. • Your audience may become quite identifiable and specialist, making it easier to judge the topics of interest. • Remember that your social media presence may also be read by people who are not service users or project partners.
<p>✓ DO</p>	<p>Be respectful to all parties</p> <ul style="list-style-type: none"> • In terms of legislatively protected areas of equality, diversity, respect and fairness (e.g. age, disability, gender, reassignment, marriage/civil partnership, pregnancy and maternity, race, religion/belief, sex and sex orientation). • In terms of good netiquette and professional appropriateness (e.g. no aggressiveness, rudeness, politics).
<p>✓ DO</p>	<p>Engage with stakeholders and link to others' relevant content</p> <ul style="list-style-type: none"> • Links to images, slides, etc. should be appropriately credited. • Ensure resources used are cleared (e.g. under Creative Commons). • Make reasonable efforts to ensure content used or linked is responsibly created (e.g. not the result of copying, piracy, etc). • Ensure your own postings do not breach rights/copyright.
<p>✓ DO</p>	<p>Ensure that any negative comments or criticism you post are...</p> <ul style="list-style-type: none"> • Balanced and measured in content and tone. • Within the scope of the social media presence.
<p>✓ DO</p>	<p>Consult your supervisor/manager about any difficult or sensitive topics</p> <ul style="list-style-type: none"> • This may include prospective developments, modifications to services, and changes in personnel. • Your supervisor/manager should be able to clarify what can be shared, help with wording, and could suggest a suitable caveat.
<p>✓ DO</p>	<p>Follow the principles of "writing for the web"</p> <ul style="list-style-type: none"> • Make your writing "scannable" by using meaningful titles, and putting important keywords at the beginning of sentences. • Break up large blocks of text and write succinctly. • An informal style does not mean editing is unnecessary. The University offers Writing for the Web courses (register in MyEd).
<p>✓ DO</p>	<p>Monitor the activity around your social media presence</p> <ul style="list-style-type: none"> • Keep track of your own activity (number of posts etc.). • Use tracking or analytics to gauge readership. • Keep track of RSS subscriptions, followers or other useful measures.
<p>✗ DON'T</p>	<p>Publish anything which may be commercially sensitive</p> <ul style="list-style-type: none"> • Includes minutes that have not been agreed, potential partnerships, bids in progress, funding situations. • Seek advice over any item where the publication status is unclear.

3.6. Comments

When you have a new comment on your blog you should work through the Comment Moderation Flow Chart (section 6) which will help you decide the best action to take. If any comment falls outside this guidance please raise this with your manager/supervisor.

- Have a mechanism for users to report inappropriate or spam comments.
- Publish your takedown policy.
- If available, comment moderation should be used regularly to limit the potential for spam or abuse.
- If moderation is not available (e.g. Twitter) then you should monitor and 'garden' (remove spam, respond as needed) regularly.
- Ensure there is a secondary contact, so comments can be moderated or gardened when the primary contact is unavailable.

As a broad guide, any comments received should be published (or removed/reported as spam) as soon as possible. You may also want to respond to what has been said, in which case you should always respond in a professional and measured tone that reflects the University's communications practice. **Remember that you are representing the University in your response.**

When responding to comments whether on your presence, or postings on others' presence, bear in mind:

- **Transparency** – Disclose your connection with the University of Edinburgh and/or with your project/service/team.
- **Sourcing** – Cite any relevant sources using URLs, references, videos, images, etc.
- **Timeliness** – Make sure you reply quickly to the original comment (inside 48 hours if possible and quicker if the comment is particularly time sensitive). For microblogs you will want to monitor responses or comments at least once every day. Take time to create a good response but, if needed or appropriate, you can always add a further follow up comment afterwards (e.g. if you are dealing with a comment about a service downtime or bug).
- **Don't stifle discussion** – It is appropriate to publish both positive and negative comments and, if you feel that additional information or correction is needed you can and should add this publicly. The more transparent your blog can be, the more trusted it will be.
- **Be fair** – It is not always possible to judge tone from textual comments so please ensure you do not make your commentators look bad or lose face, even if you are correcting a criticism or misconception. Anger is not a professional response to criticism. Try drafting your response then leaving it a few minutes. Then read over it again and you may wish to ask your supervisor/manager or a colleague to check it before posting publicly.
- **Measure** – Keep a record of comments (whether received or posted by you) so that they can be noted for relevant metrics and learned from. Some comments may also help highlight particular strengths, weaknesses or opportunities for your project, research service, or area of work.

3.7. Freedom of information requests

Any recorded request for information is a freedom of information (FOI) request. Some enquirers may use social media to submit a request, for example, they might use Twitter, or the comments section of a blog.

If your social media presence receives a request for information, remember:

- You have a maximum of 20 working days to answer the request.
- If the request concerns your area of work and the information can be released, avoid complications by following the procedures.
- Contact your local FOI practitioner if you want to refuse any part of the request, are unsure about any aspect of the request, or if it does not relate to your area of work.

The request handling procedures and list of FOI practitioners are published on the Records Management Section website, www.ed.ac.uk/records-management

3.8. Exit strategy

If the service that the social media presence represents ceases to operate, it is important that this is clear. Change headlining information to clearly reflect that the service no longer operates, and direct people to an alternative service or contact.

Disable comments if possible. If you cannot disable comments, make sure you continue to keep an eye on the presence – disused social media presences can become breeding grounds for spam and ‘troll’ comments.

Use the University retention scheduling advice on the Records Management Section website, www.ed.ac.uk/records-management, to decide how long you need to keep the information published via your social media presence. Arrange to implement that decision, for example by taking a copy to store off-line for the specified period or by deleting the presence after the specified period.

Remember that extant information continues to be subject to data protection and FOI requirements.

4. Questions or comments about these guidelines

If you have any questions about these guidelines please contact the University Website Programme (website.project@ed.ac.uk), which welcomes any suggestions for new areas to be covered or requests for clarification.

5. University policies

As indicated in the introduction this guidance is based in the wider context of University of Edinburgh employment, behaviour and disciplinary policies. In particular please work within the following policies, regulations and guidance (many also refer back to UK and EU legislation regarding copyright, data protection, etc.):

- [University Brand Guidelines](#)
- [Computing Regulations](#)
- [Data Protection](#)
- [Dignity and Respect Policy](#)
- [Disability Policy](#)
- [Disciplinary Policy and Procedure](#)
- [Freedom of Information](#)
- [JISC Legal Guidelines](#)
- [Policy on the storage, transmission and use of personal data and sensitive business information out with the University computing environment](#)
- [Rules for the Guidance of Staff](#)
- [Statement of Professional Standards](#)
- [Transferring information to other organisations: model contract clauses](#)
- [University of Edinburgh Equality Guidance](#)
- [University Regulations](#)
- [Web 2.0 Guidelines 2008](#)

