Institutional Social Media Accounts for Marketing and Communications Purposes

University Policy

Applies to: Faculty, staff, student-employees, and other individuals who create and/or maintain institutional social media accounts for university marketing or communications purposes.

Responsible Office	Office of Advancement

POLICY

Issued: 04/15/2019

The creation and use of **institutional social media accounts** for university marketing and communications purposes are increasingly common. Social media platforms offer significant opportunities for The Ohio State University to raise brand awareness, engage audiences, drive action, and spur advocacy in support of the university's teaching, research, and service missions; the university's administrative functions; and students' campus-life activities. When engaging in **social media** for university marketing and communications purposes, individuals must be conscious of the marketing and communication benefits of such social media use in the broader context of university security, compliance, brand, and reputation and conduct themselves in accordance with university policies.

Purpose of the Policy

To provide guidance regarding the creation and management of institutional social media accounts for university marketing or communications purposes.

Definitions

Term	Definition
Account manager	Person with primary day-to-day responsibility over a social media account.
Account take-overs	An occurrence during which individuals who are not account managers are given temporary permission to use an account to drive interest and share new content.
Clickwrap agreement	Legal agreement that can be accepted by clicking "Yes" or "I accept" on a screen icon. Terms and conditions on social media platforms often are agreed to via a clickwrap.
Incident	Per the Ohio State Comprehensive Emergency Management Plan, an occurrence, natural or manmade, that requires a response to protect life or property. Incidents can, for example, include major disasters, emergencies, terrorist attacks, terrorist threats, civil unrest, wildland and urban fires, floods, hazardous materials spills, nuclear accidents, aircraft accidents, earthquakes, hurricanes, tornadoes, tropical storms, tsunamis, war-related disasters, public health and medical emergencies, and other occurrences requiring an emergency response.
Institutional social media account	Accounts for university marketing and communications purposes that meet one or more of the following criteria: 1. Created to extend the reach of Ohio State content to external audiences beyond university staff, faculty, or students; 2. Created to extend the reach of Ohio State non-academic content to internal audiences such as staff, faculty or students where content is also visible to external audiences; 3. Used to comment or publish content in the capacity as a **principal administrative official** of the university (e.g., President, Provost, Athletic Director, Dean); and/or 4. Supported by university resources (employees, budget, or tools funded by the university) to reach external audiences beyond university staff, faculty, or students. Institutional social media accounts do not include accounts created by students or student organizations, or accounts used solely for research or teaching purposes.
Primary accounts	Accounts that represent greater opportunity and risk due to the size of their followings or their public profile; criteria outlined in the Institutional Social Media Protocols and Standards.

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Principal administrative official	University officials who are accountable for personal and professional statements expressed on social media that are perceived publicly as opinions of the university. As set forth in Rule 3335-1-03, the term "principal administrative official" includes the members of the president's cabinet, the college deans and the dean and directors of regional campuses and their designated staffs, the director of the university libraries, chairs of academic departments, directors of schools and academic centers, and such other administrative officials as determined by the president. Private social media accounts for these individuals that are reserved strictly for personal use – and are in no way supported by university resources – are not covered by the policy.
Social media	Activities on web-based social network platforms that allow individuals to: 1. Construct a public or semi-public profile within a bounded system, 2. Articulate a list of other users with whom they share a connection, and 3. View and traverse their list of connections and those made by others within the system. Examples of platforms used for marketing and communications at Ohio State include Facebook, Instagram, Twitter, LinkedIn and YouTube.
Social Media Community of Practice	Social media practitioners across campus who participate in knowledge sharing at a recurring forum and/or through ongoing electronic communications.
Terms and conditions	Rules imposed by a social media platform that users must agree to in order to use the service. Also known as "terms of use" and "terms of service."
Publishing tool	Software or platform used to administer access, settings, publishing, reporting, and other features used in managing social media accounts.
Unit	General term for college, office, department, center, or other organization at Ohio State. Examples include Athletics, University Marketing, University Communications, Student Life, and Wexner Medical Center.
Unit social media lead	Person acting as the policy expert for account managers within their unit and the primary point of contact for University Marketing in regard to the policy.

Policy Details

I. Institutional Social Media Accounts
   A. Each institutional social media account must have an associated **account manager** and a **unit social media lead**. In some units, the same individual may serve in both of these roles. These account managers and unit social media leads implement the requirements of this policy and participate in the **Social Media Community of Practice** through electronic communications and regularly-scheduled meetings hosted by University Marketing.
   B. Institutional social media accounts must be approved through a formalized application process. (Accounts created prior to March 15, 2019 do not need to apply.)
   C. Institutional social media accounts will be audited annually to meet a minimum set of requirements. (Individual units may apply additional requirements.)
   D. Institutional social media accounts designated as **primary accounts** have additional requirements to mitigate institutional risk.
   E. University Marketing and unit social media leads reserve the ability to freeze or close an account if the application process is not followed, audits are not conducted, or minimum requirements are not met.
   F. University Marketing, in collaboration with the Social Media Community of Practice, will provide outreach and training on this policy and best practices.
   G. Information created and stored on institutional social media accounts may be subject to Ohio public records law and public records requests.

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II. Additional Guidance

A. Institutional social media accounts also are subject to the following requirements and guidelines to nurture best practices and mitigate risk:

1. Institutional Social Media Account Protocols and Standards (ISMAPS) (addressing account minimum requirements, primary account criteria, **account take-overs**, account recovery, and account management transitions);
2. Brand Guidelines;
3. General Records Retention Schedule; and
4. Political Activity Guidelines.

B. All institutional social media accounts are subject to all university rules and policies including, but not limited to, Responsible Use of University Computing and Network Resources, Institutional Data, Digital Accessibility, Records Management, Information Technology (IT) Security, and Public Records.

PROCEDURE

Issued: 04/15/2019

I. Creating an Institutional Social Media Account

A. Units wishing to start an institutional social media account must designate an account manager and identify the unit social media lead. Only current faculty, staff, and student-employees may be designated as account managers and unit social media leads. Non-employees, such as students and volunteers, may assist with institutional social media accounts under the direction of account managers, who remain responsible for the accounts.

B. All institutional social media accounts must be approved through a formal application process before the accounts may go live. The application process is published in the ISMAPS and annually reviewed by University Marketing, in consultation with the Social Media Community of Practice. This application requirement does not apply to accounts created prior to March 15, 2019.

C. Account managers may not open institutional social media accounts unless the accounts meet the minimum requirements set forth in the ISMAPS.

D. Account managers may not accept a platform's **clickwrap agreement** until the unit social media lead and University Marketing approve the application for a new account.

1. University Marketing will partner annually with the Purchasing Department and the Office of Legal Affairs to review the **terms and conditions**, including clickwrap agreement terms, of the social media platforms in use.

II. Auditing an Institutional Social Media Account

A. Account managers must audit their accounts annually for compliance with the current minimum requirements set forth in the ISMAPS.

B. While accounts representing **principal administrative officials** are not required to complete the annual audit required of **unit institutional social media accounts**, these individual accounts remain subject to policy terms.

C. Account managers must submit audit results to unit social media leads and University Marketing by July 15 each year. Minimum requirements not met must be fixed within 30 days of discovery.

III. Ongoing Management of Institutional Social Media Accounts

A. Account managers of primary accounts must enroll primary accounts in a **publishing tool** that is approved by University Marketing. The pre-approved publishing tool will provide additional layers of security to mitigate institutional risk.

B. When managing institutional social media accounts, account managers must follow:

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1. The ISMAPS;
2. University policies, including those governing responsible use of university computing and network resources, institutional data, information security, digital accessibility, and records management, as well as state and federal regulations regarding the same; and
3. The General Records Retention Schedule maintained by University Archives.

C. When managing institutional social media accounts, account managers should also reference university brand guidelines and political activity guidelines when publishing, liking, sharing, or following on social media and must review the source of the content prior to liking or sharing.

D. Ohio State is a public institution. Information created and stored on institutional social media accounts may be subject to Ohio public records law and public records requests. Account managers seeking to remove posted information from institutional social media accounts must contact University Communications and the Office of Legal Affairs for consultation prior to removal, with University Marketing informed and available for consultation. This requirement applies to all posted information, whether posted by the unit or by external parties, but does not apply to the immediate removal of unit-created content due to typographical or other posting error.

E. In addition to reporting requirements mandated in other university policies, information posted on or to institutional social media accounts about possible crimes, violence, or harassment must be reported by the account manager or unit social media lead as follows:
1. Posted information that threatens violence or harm to a person, property or the university or otherwise threatens the immediate safety of a person, property, or the university must be reported immediately to the Ohio State University Police Division or 911.
2. Posted information about possible sexual misconduct, which includes sexual assault, sexual harassment, relationship violence, and stalking, must be reported to the offices identified in the university's Sexual Misconduct policy (see Policy Details V.C.1). If such posted information contains a threat as described in III.E.1 above, the information must also be reported immediately to the Ohio State University Police Division or 911.
3. Posted information about other possible crimes not described in III.E.1 or III.E.2 above should be reported to the Ohio State University Police Division if the information would lead a reasonable person to believe a crime has occurred or will occur.

F. If the Department of Public Safety declares an **incident**, as defined by the Ohio State Comprehensive Emergency Management Plan, University Marketing will notify the Social Media Community of Practice to alert them of the situation, and individual units must consult with University Communications on any planned postings or references to the incident.

G. Endorsements or promotions of third party products or services posted from institutional accounts must comply with Unrelated Business Income Tax (UBIT) terms and require consultation with the Office of Trademark & Licensing prior to posting. Messages featuring third-party products or services may not conflict with existing university exclusivity arrangements.

IV. Closing and Recovering Institutional Social Media Accounts
A. University Marketing and unit social media leads may freeze or close accounts if the application process is not followed, audits are not conducted, or the minimum requirements set forth in the ISMAPS are not met.
B. For accounts inactive for 30 days or more, University Marketing will work with the relevant unit social media lead and the account manager to resolve the inactivity, close the account, or merge it with an active account.
C. A protocol for recovery of hacked social media accounts is set forth in the ISMAPS.

V. Transitioning Management of an Institutional Social Media Account
A. The required protocol for transitioning management of an account is set forth in the ISMAPS.

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    B. Account managers must notify the unit social media lead when account management needs to move to another individual.

    C. Unit social media leads must notify University Marketing when their responsibilities are transferred to other individuals and when account managers' responsibilities move to other individuals.

    D. The unit social media lead or the new account manager must remove the administrative permissions of prior account managers and unit social media leads.

VI.   Identifying and Classifying Institutional Social Media Accounts

    A. University Marketing will conduct quarterly scans to identify accounts affiliated with the university. Through such scans and with assistance from unit social media leads, University Marketing will maintain a master list of all institutional social media accounts. Unit social media leads are responsible for maintaining a list of their unit social media accounts, and corresponding managers, to ensure accuracy of the university's master list. University Marketing will update and publish this master list annually, at minimum.

    B. University Marketing will use the primary accounts criteria published in the ISMAPS to determine which accounts should be classified as primary accounts. University Marketing will maintain a list of primary accounts.

VII.   Review of the Institutional Social Media Account Protocols and Standards (ISMAPS)

    A. University Marketing will lead an annual review of the ISMAPS supporting this policy in consultation with the Social Media Community of Practice and the Office of Legal Affairs.

Responsibilities

Position or Office	Responsibilities
Account manager	1. Adhere to this policy in managing institutional social media accounts. 2. Notify unit social media leads when account management responsibilities change and remove administrative permissions of prior account managers and unit social media leads. 3. Participate in the Social Media Community of Practice. 4. Report information posted to institutional social media accounts about possible crimes, violence, or harassment as set forth in the policy.
Office of Legal Affairs	1. Review terms and conditions of social media platforms. 2. Consult on removal of posted information. 3. Consult on annual review of ISMAPS.
Social Media Community of Practice	1. Consult on annual review of ISMAPS. 2. Provide outreach and training on this policy and best practices.
Unit social media lead	1. Act as liaison to University Marketing. 2. Partner with University Marketing to oversee account registration, management, and audit processes. 3. Participate in the Social Media Community of Practice. 4. Freeze or close accounts that do not comply with this policy. 5. Work with University Marketing and the account manager if an account is inactive for 30 days. 6. Notify University Marketing when account management responsibilities change for account managers or unit social media leads and remove administrative permissions of prior account managers and unit social media leads. 7. Maintain a list of unit social media accounts, and corresponding leads and managers, to ensure accuracy of the university's master list. 8. Report information posted to institutional social media accounts about possible crimes, violence, or harassment as set forth in the policy.
University Marketing	1. Administer this policy. 2. Provide outreach and training on this policy and best practices. 3. Lead annual review of ISMAPS in consultation with Social Media Community of Practice and Office of Legal Affairs; publish ISMAPS.