



Social Media Policy and Guidelines

Overview

Social media is an important marketing component that supports the College's ability to communicate with the public, our members and leadership. It offers many benefits:

- Increases public recognition of the quality of ACTEC's Fellows
- Increases professional recognition and discussion
- Promotes publications
- Highlights commentary by Fellows
- Educates the public about trust and estate topics

Please join us in promoting ACTEC on social media and on the Web.

1. Procedures

In order to ensure that ACTEC continues its policy of maintaining the highest level of integrity and professionalism in our presence on various social media sites, and to coordinate the use of those accounts, social media posts by the College will be restricted to the Executive Director and Communications staff. The College shall not post anything on social media that contains profanity or contains controversial opinions that could be offensive and will adhere to ACTEC policies and procedures.

For purposes of this Policy, a controversial opinion includes advocating for or against a particular political position, candidate or officeholder; expressing a religious belief; expressing an opinion outside the practice of trust and estate law that would likely be offensive to any particular group of individuals, or which is likely to be seen as argumentative or given to controversy.

ACTEC's official social media accounts include:

- LinkedIn
- Twitter
- Facebook
- YouTube
- Google+

Marketing is about "casting a bigger shadow" and social media is an important tool for promoting brand and search engine optimization on the web. ACTEC is a College of the "best and brightest." The goal is to make sure we position ACTEC and the Fellows as leaders in the field to be recognized by generations to come.

Fellows

We encourage Fellows to “follow” the ACTEC social media accounts and interact with posts by commenting, sharing and “liking.” This is a critical component to social media marketing success. Recommendations:

- Photos — Make sure that people in the posted pictures are comfortable with having their image posted.
- Twitter — add @ACTECNEWS to tweets when participating in events.
- Facebook — add @ACTECFELLOW to photos and posts that will be of interest to those following the organization.
- Copyright — Respect copyright. Before posting someone else's work, please check with the owner first.

ACTEC Staff

- Do not post unless you are an official spokesperson and have approval by ACTEC Executive Director.
- When appropriate, “like” and “share” on personal social media.
- Never post ACTEC business on your personal social media accounts.

2. Function and responsibilities

| FUNCTION | PERSON RESPONSIBLE |
|--|---|
| Creating ACTEC brand guidelines | Marketing Director with approval of ACTEC Communications Committee, Executive Director, Regents |
| Sharing public articles/commentary from website | Marketing Director with approval of Communications Committee Chair and Executive Director |
| “Liking” New Fellow announcements | Marketing Director and Communications Committee Chair may acknowledge verified announcements and extend congratulations |
| ACTEC News and Press Releases | Marketing Director may promote with approval of Executive Director and Executive Committee |
| Foundation recipients, such as Young Leaders or Mary Moers | Marketing Director and Communications Committee Chair may acknowledge verified announcements and extend congratulations |
| Foundation news and blogs | Marketing Director may promote with approval of Foundation President and Executive Director |
| Foundation Fundraisers | Marketing Director may promote with approval of Foundation President and Executive Director |

3. Potential legal risks

Additional guideline for staff and Fellows:

- **Crediting sources:** ACTEC staff will credit original sources or acquire copyright where needed when posting to the web.
- **Privacy and disclosure procedures:** All content that requires an ACTEC user account to access is conceded “private” and should not be posted without the written direction of leadership.
- **Controversial opinions by Fellows:** Fellows who offer controversial comments in social media or the web as an “ACTEC Fellow” should include a disclaimer such as, “views expressed are mine and don’t necessarily reflect those of ACTEC.”

4. Requesting posts on social media

All post requests by the Executive Committee of the College or ACTEC Fellows should be emailed to the Executive Director and Marketing Director. The request should include:

- Contact information of Fellow requesting
- Link to article/blog/announcement
- Information regarding whether the post is news worthy and timely for the topic

5. Accountability

Please act responsibly, exercise caution and common sense whether posting on behalf of the College or personal public accounts.