1. What this policy covers

This document is intended to cover expectations for employees and volunteers of the Insurance Accounting and Systems Association surrounding social media usage when utilizing social media either in an official capacity (e.g., utilizing one of the official IASA social media accounts) or when acting in a manner that could reflect on the association (e.g., posting to personal social media accounts during official IASA events where such posts will reflect upon the reputation of the IASA or fellow employees or volunteers).

2. How IASA uses Social Media

IASA uses social media in multiple ways which are continually evolving. Uses for the 2014 year from the annual plan include but are not limited to:

- Scheduled postings on Facebook, LinkedIn, Twitter, Google+, Instagram, and YouTube to promote various events and functions at the national level
- On-site postings on Facebook, Google+, Instagram, Twitter, and YouTube at various events at the national level
- Scheduled postings on Facebook, LinkedIn, Twitter, Google+, Instagram, and YouTube to promote various events and functions at the local chapter level
- On-site postings on Instagram and Twitter at various events at the local chapter level
- Maintenance of an official LinkedIn Company page for the IASA Association for posting of announcements and linking to by employees and volunteers
- Maintenance of an official LinkedIn Group page for discussions led by IASA committees and members
- Maintenance of an official IASA Company page on Facebook for the IASA Association for posting official news, announcements, and history
- Maintenance of an official IASA Educational Conference and Business Show page on Facebook for posting official conference-related news, announcements, and history
- Maintenance of an official IASA Twitter account for posting official news and announcements
- Maintenance of an official IASA Instagram account for posting photos from IASA events
- Maintenance of an official IASA YouTube account for posting video from IASA events
- Maintenance of an official IASA Google+ Company page for the IASA Association for posting official news, announcements, and history
- Various contests to promote and encourage use of social media in general and following of the IASA accounts in particular
- Stakeholding of the official IASA account name on new and emerging social media sites to protect the IASA name and reserve the name for future use
- Maintenance of an official email box for social media: socialmedia@iasa.org

3. Linking Social Media to our Mission and Objectives

The mission of IASA is to initiate and facilitate the exchange of educational information and ideas among insurance related professionals to enhance the effectiveness of these individuals, their employers and the financial services industry as a whole.

The objectives of the IASA are:

- To provide members/participants with a clear understanding of the foundation and disciplines required in the financial services industry in various areas including legal/regulatory, products, systems/technology, and emerging trends and issues.
- To aid members/participants in applying knowledge consistent with "best practices" and industry standards and to assist in creating "better practices" founded on new innovative solutions enabled by technology.
- To offer members/participants networking opportunities and access to industry experts and solution providers in order to assist them in addressing individual, employer or industry key issues and to expand their individual professional competencies.

IASA utilizes social media in order to better promote its educational resources; better facilitate the exchange of educational information and ideas, and to better enhance the effectiveness of insurance professionals and their employers, including education and information on how to use social media responsibly for professional development and marketing purposes. IASA also utilizes social media to forge connections between members to better expand networking opportunities and sharing of thought leadership and best practices.

4. Policy for Official Use by IASA National Association

Official use of IASA social media sites is to be used for IASA business only. Anyone utilizing IASA social media shall do so for the benefit of the association and not in a biased manner for the benefit of any particular member company (expressly including his or her own employer.)

IASA Site Administrators (hereafter called "IASA Administrators") are responsible for the ongoing maintenance of specific sites and must program content as provided by their respective committees (subject to editorial restrictions of the platform and grammar/spelling corrections as needed.) In addition, IASA Administrators are expected to check their respective social media sites on a regular basis (at least once every 48 hours) to ensure that no inappropriate comments are posted to a wall, linked to an account, or written in a discussion or comment string. Anything of concern should be brought to the attention of the Social Media Chairperson and the IASA Director of Member and Volunteer Services immediately (within 1 hour if not sooner) for action—see contact information on Page 4.

IASA Social Media Users (hereafter called "IASA Users" and defined as anyone provided a username and password to an official IASA social media account) are responsible to post only content that reflects properly on the association and its members. If during use an IASA User identifies concerning content (such as inappropriate comments or discussions as stated above), the IASA User should immediately bring the offensive content to the attention of the Social Media Chairperson and the IASA Director of Member and Volunteer Services for action (within 1 hour if not sooner). If provided access for a limited period of time, IASA Users must terminate their account access at the end of the agreed upon period of time by logging out of the social media site and passwords provided must be destroyed. Finally, any posts made to official IASA sites or on behalf of the IASA are deemed to be official IASA content regardless of whether the content is posted during working hours or after hours.

5.   Policy for Official Use by IASA Local Chapters

For the purposes of promoting local chapter events, designated representatives of Local IASA Chapters can be designated as IASA Social Media Users (hereafter called "IASA Local Users" and granted short-term access to Twitter and Instagram for the duration of the Local IASA Chapter Event. IASA Local Users are responsible to post only content that reflects properly on the association and its members. IASA Local Users are expected to use the proper hashtag for the local chapter or event for all posts (see Appendix B). If during use an IASA Local User identifies concerning content (such as inappropriate comments or discussions as stated above), the IASA Local User should immediately bring the offensive content to the attention of the Social Media Chairperson and the IASA Director of Member and Volunteer Services for action (within 1 hour if not sooner). IASA Local Users must terminate their account access at the end of the agreed upon period of time by logging out of the social media site and passwords provided must be destroyed. Finally, any posts made to official IASA sites or on behalf of the IASA are deemed to be official IASA content regardless of whether the content is posted during working hours or after hours.

6.   Policy for General Social Media Use at IASA Events

When attending official IASA events (including planning meetings, conferences, etc.) and acting in an official capacity as an employee or volunteer of the IASA, employees and volunteers of the association (hereafter referred to as "Representatives") are expected to reflect the interests of the association; even in personal social media where the association's involvement is reflected. Care should be taken by all Representatives to avoid posting photos, videos, or comments that position the association or any of its members in a negative light. As a reminder, context is everything, and people's reputations are always at risk. If in doubt, do not post it.

It is impossible to list every possible use of social media which could constitute inappropriate content or content that would position the association or its members in a negative light. However, as a general guide, employees and volunteers should avoid posting any content that is cruel, demeaning, disrespectful or intentionally harmful to the reputation of an individual or corporate member of the IASA, or to any employee or volunteer of the IASA, as well as avoiding any posts that include partial or full nudity, sexually suggestive content or context, excessive drinking, violence, drug use, illegal actions, or any other activity which is counter to IASA's or a member's reputation or values.

7.   Consequences & Discipline

IASA Administrators, IASA Users, and IASA Local Users who violate this policy may have their rights to access IASA Social Media sites rescinded, especially following repeated violations. Representatives who violate the Policy for General Social Media Use may lose their volunteer status or may face termination as an employee of the association.

Accidental violations will be dealt with as required, depending upon the severity of the violation. Willful violations causing harm to the association or a member of the association will be dealt with as strictly as possible.

8.   Whom to Contact with Questions

Questions about this policy should be directed to the IASA Marketing Associate and/or the Social Media Chairperson, currently:

Kaitlyn Jolly
Marketing Associate
IASA International Office
Kjolly@IASA.org
919.489.0991, ext. 210

Emergency Line: 919.717.0026

Tina Nacy
Social Media Chairperson IASA
Michigan Automobile
Placement Facility
Tnacy@MAIPF.org
734.464.2980

Emergency Line: 810.923.1281

9. Appendix A: Official Hashtag List

Definition: a hashtag is used to mark keywords or topics in a Tweet or other social media post. It was originally created organically by Twitter users as a way to categorize messages. People and organizations use the hashtag symbol # before a relevant keyword or phrase in their post to categorize those posts and help them show more easily in searches. Clicking on a hashtagged word in any message shows you all other posts marked with that keyword. Hashtagged words that become very popular are often Trending Topics. As a rule, if you want to be able to see all the content created about a topic or event, or you want users to be able to find all the content related to a topic or event, you should assign it a hashtag. More importantly, if you fail to create a hashtag, your users will create one for you. (Sources: Twitter FAQ, Instagram FAQ, common social media knowledge).

Not all of the below will necessarily be used; however, as indicated above, we are planning ahead.

Events*

Name	**Hashtag**	**Notes**
National Events		
Annual Conference	#IASA2016	IASA + Year
Executive EDGE Conference	#IASAEDGE	
Boot Camp	#IASABootCamp	
Fall Planning Meeting	#IASAFall	
Spring Planning Meeting	#IASASpring	
Profit & Cash Game®	#IASAProfitCash	
Vendor Connect Tours	#IASAVCT	

* Year to be used only with the National Conference; other hashtags will be reused each year.

Appendix A – Official Hashtag List (Continued)

Chapters

Name	Hashtag
Carolinas	#IASACAR
Central Illinois	#IASACI
Chicagoland	#IASACHL
Desert States	#IASADS
Georgia	#IASAGA
Indiana Land-	#IASAIN
O-Lakes	#IASALOLK
Metro New York/New Jersey	#IASANYNJ
Michigan	#IASAMI
Mid-Atlantic	#IASAMAT
Mid-South	#IASAMSO
Mid-West	#IASAMW
Northeastern	#IASANE
Northern California	#IASANCAL
Ohio	#IASAOH
Pacific Northwest	#IASAPNW
Rocky Mountain	#IASARM
South Florida	#IASASFLA
Southern California	#IASASCAL
Southwestern Ohio	#IASASWO
St. Louis	#IASASTL
Sunshine	#IASASUN
Tampa Bay	#IASATBAY
Texas	#IASATX
Utah	#IASAUT
Wisconsin	#IASAWI

Appendix A – Official Hashtag List (Continued)

Committees†

Name	Hashtag
Career Skills Development	#IASACSD
Chapter Advisory	#IASAChapters
Compensation	#IASAComp
Distance Learning	#IASADistLrn
Education	#IASAEdu
Executive Education Program	#IASAExec
Exhibits	#IASAExhibits
Finance/Audit	#IASAFinAudit
Industry Relations	#IASAIndRel
Insurance Acctg, Risk Mgmt & Finance	#IASAARF
Interpreter/eInterpreter	#IASANews
Management Team	#IASAMgmt
Membership	#IASAMembers
Nominating	#IASANoms
Policy	#IASAPolicy
Polls	#IASAPolls
Seminars	#IASASeminars
Solution Provider Enrichment	#IASASPEC
Site	#IASASites
Strategic Planning	#IASAStrategy
Technology Program	#IASATech
Textbook	#IASATextbook
Volunteer Development	#IASAVolunteer

† Used for committee-specific content. Example: Announce new textbooks, new membership drive program, new seminar, etc. Also to be used with LinkedIn discussion topics and to link to them.

10. Appendix B: Official IASA Social Media User Forms

IASA Social Media Administrator Acknowledgment:

I acknowledge that as an IASA Social Media Administrator, I am a representative of the Insurance Accounting and Systems Association (IASA), and will represent IASA in all actions taken on the IASA social media site(s) I administer.

Specifically:

> I will not send, share or post images, videos or content that is cruel, demeaning, disrespectful or intentionally harmful to the reputation of an individual or corporate member of the IASA, nor to any employee or volunteer of the IASA;

> I will not download, share, send or post material which includes nudity, violence, drug use, illegal actions, or any activity which is counter to IASA's reputation or values;

> I will not act in a biased manner for the benefit of one member company over another;

> I am expected to check my respective social media sites on a regular basis (at least once every 48 hours) to ensure that no inappropriate comments are posted on a wall or written in a discussion or comment string, and I will immediately bring anything of concern to the attention of the Social Media Chairperson and the IASA Director of Member and Volunteer Services for action (within 1 hour or less of identifying said content); and

> Upon termination of my duties as an Administrator or upon request, I will immediately log out of all IASA-owned social media sites to which I have access and destroy any passwords in my possession.

Name: _____

Title: _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Signature: _____ Date: _____

IASA Social Media User Acknowledgment:

I acknowledge that as an IASA Social Media User, I am a representative of the Insurance Accounting and Systems Association (IASA), and will represent IASA in all actions taken on the IASA social media site(s) I utilize.

Specifically:

> I will not send, share or post images, videos or content that is cruel, demeaning, disrespectful or intentionally harmful to the reputation of an individual or corporate member of the IASA, nor to any employee or volunteer of the IASA;
>
> I will not download, share, send or post material which includes nudity, violence, drug use, illegal actions, or any activity which is counter to IASA's reputation or values;
>
> I will not act in a biased manner for the benefit of one member company over another;
>
> I will immediately report any inappropriate comments posted on a wall or written in a discussion or comment string or anything else of concern to the attention of the Social Media Chairperson and the IASA Director of Member and Volunteer Services for action (within 1 hour or less of identifying said content); and
>
> Upon termination of my duties as a User or upon request, I will immediately log out of all IASA-owned social media sites to which I have access and destroy any passwords in my possession.

Brief description of site(s) used and purpose: _____

_____

Name: _____

Title: _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Signature: _____ Date: _____

IASA Social Media Local Chapter User Acknowledgment:

I acknowledge that as an IASA Social Media User, I am a representative of the Insurance Accounting and Systems Association (IASA), and will represent IASA in all actions taken on the IASA social media site(s) I utilize.

Specifically:

I will not send, share or post images, videos or content that is cruel, demeaning, disrespectful or intentionally harmful to the reputation of an individual or corporate member of the IASA, nor to any employee or volunteer of the IASA;

I will not download, share, send or post material which includes nudity, violence, drug use, illegal actions, or any activity which is counter to IASA's reputation or values;

I will not act in a biased manner for the benefit of one member company over another;

I will use the approved hashtag for either the chapter or event for all posts;

I will immediately report any inappropriate comments posted on a wall or written in a discussion or comment string or anything else of concern to the attention of the Social Media Chairperson and the IASA Director of Member and Volunteer Services for action (within 1 hour or less of identifying said content); and

Upon termination of my duties as a User or upon request, I will immediately log out of all IASA-owned social media sites to which I have access and destroy any passwords in my possession.

Chapter Events for which use is being granted: _____

_____

Name: _____

Title: _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Signature: _____ Date: _____