

**I. DEFINITION OF TEAM ROLES**

It is the responsibility of members to represent the organization in its best light when using social media. Responsibilities include, but are not limited to:

- A. Passwords and security for Optimist International Social Media accounts are maintained by the Director of Communications with oversight by the Director of Information Technology. Accounts for all Clubs, Districts and Regions should be maintained by the Club, District or Region Communication/Marketing Chair in collaboration with the Technology Chair or equivalent position in the district.
- B. Daily posting and engagement will be managed by the Director of Communications and/or their assigned assistants on Optimist International social media accounts and the equivalent at the Club, District and Region level.
- C. Customer service is an ongoing activity provided by the employee or volunteer who is utilizing the account on behalf of Optimist International. It is their responsibility to complete the service requested or forward the request to the most appropriate person for completion.
- D. Strategy and planning are directed by the Optimist International Marketing and Communications Committee with oversight by the Optimist International Board of Directors. The Director of Communications participates in the development of the plan and is responsible for its execution.
- E. Monitoring and listening are the responsibilities of the Director of Communications with assistance from the International Marketing and Communications Committee. Analytical tools and resources are the responsibility of the Communications Department with oversight by the Information Technology Department.
- F. Should any posting fall outside of the adopted plan must be approved by the executive director with appropriate input of the Board of Directors and if necessary counsel.
- G. Advertising is limited to Optimist International activities. Partners and sponsors may be afforded social media mention in accordance with established guidelines provided in any endorsement package and approved by the International Marketing and Communications Committee and/or Board of Directors.
- H. Social media training for employees is the responsibility of the Executive Director. Social media training for volunteers and members is the responsibility of the International Marketing and Communications Committee.
- I. Should an online crisis such as hacking occur, it is the responsibility of the current or daily assistant to capture a screenshot with a time stamp and poster information included if possible and then promptly removed. All contributors to the page or account should be alerted to the issue. Passwords should be immediately updated.
- J. All recognized accounts of Optimist International should be added to this list as created or changed.

Social Media Accounts as of 11/09/2019 follow:

YouTube: @optimistintl

Facebook: @optimistintl; @optimist.golf; @oipresident; @junioroptimist

Twitter: @optimistorg; @OIJGC; @junior\_optimist

Instagram: @optimistintl; [golf?]; [joi?]

LinkedIn: Optimist International (company page); Junior Optimist Octagon International (company page)

## II. SECURITY PROTOCOL

### Passwords:

- Facebook: Approved contributors should regularly monitor their personal accounts for security issues, including regular updates of their password.
- All other accounts: passwords and access are coordinated by Optimist International staff.

Duly authorized Optimist International Staff are responsible for maintaining passwords for Optimist International affiliated social media accounts. Clubs, Districts and Regions are responsible for maintaining the security of accounts for themselves.

Optimists and/or JOI Advisors may not engage with youths through private online chatting or gaming or any form of one-on-one type of social media, including but not limited to Instagram, Twitter, Facebook, Tumblr, YouTube, LinkedIn, and any other interactive social media platforms. For purpose of this policy, the term "social media" means website and applications that enable users to create and share content of any kind, type of quality, or to participate in social networking through online interactions. (from Optimist Club Youth Protection Policy C12)

In the event of hacking - posts should be screen captured with time stamp and poster information (when possible) then promptly removed. All contributors linked to the page or account should be notified and passwords updated.

## III. COMPLIANCE

Article I of the Optimist International Bylaws states, "The titles 'Optimist,' 'Optimist International,' or 'Optimist Club,' and the slogans, 'Friend of the Boy' and 'Friend of Youth', the Optimist, 'Optimists Bringing Out the Best in Kids', and 'The Optimist Creed', and any emblem, seal, insignia, or other adopted or registered trademarks or slogans of Optimist International shall not be used for purposes other than those authorized by the Board of Directors." Compliance is outlined in Optimist International Board Policy ICD-1 for all social media channels at all levels of the organization.

- A. Social Media is about Sharing. Many designers and influencers create content that is meant to be shared; however, because something has been posted on social media does not mean that it is now in the public domain and free to use.
  - i. When posting to Optimist International social media sites, the content should be original, comply with fair use doctrine, or clearly state the attribution of the original post or content.
  - ii. When in question, the original author or artist should be contacted for permission to use on the Optimist International social media site.
- B. Members may be active on social media, but privacy should not be compromised. Policy CD-6 may be referred to for detail.

- C. Members acting on behalf of Optimist International on social media platforms may be required to sign a non-disclosure agreement as a means of keeping private or sensitive information private.
- D. Posting hate speech, threats of violence, harassment, or racial epithets on social media violate Optimist International's goals and beliefs. Any Optimist Club member posting this content may be removed from membership as is stated in Policy ICD 13.
- E. Optimist International has the right to audit Club, District, and Regional sites for compliance with this policy.

#### IV. MEMBER BEHAVIOR ON SOCIAL MEDIA ACCOUNTS

Social media accounts are personal but a member of Optimist International represents the beliefs of our organization and members are expected to hold themselves to a higher standard when using social media.

#### V. BEST PRACTICES AND EXAMPLES

Content that may be available on the Internet, or has been shared in social media, does not mean that the content can be used freely in connection with Optimist International social media or marketing activity. Optimist's use of third-party content is subject to different standards and can pose additional risks that don't apply to personal, non-commercial activity or news organizations.

##### A. When Consent Is Needed:

- Optimist International should secure permission when using (a) a third party's content (e.g., pictures, videos, or recipes) or (b) a person's name, picture, voice, profile picture, or social media handle in connection with Optimist International marketing activities.
- Separate consents must be obtained from the copyright owner (typically, the person who took the photo or video), as well as any identifiable individuals who appear in the content.
- Optimist International requires that using images of identifiable minors (under age 18) requires written consent from the minor's parent or guardian. A form of consent should be used when a person appears to be under the age of 18 and is the subject of an important shot. The age should be documented when the content is captured. Consideration that focuses on content (that does not feature minors or identifiable individuals) will reduce the permission consents that may be required.

##### Forms of Consent:

1. E-mail Consent. In some cases, it is sufficient to get consent through e-mail or social media exchange (such as direct messages through a social

media platform, if that permission can be documented and retained). Electronic consent is appropriate where both of the following criteria are met:

- The third-party content will only be used in unpaid activity in Optimist International’s social media channels; and
- The content does **not** contain a celebrity, a child under 18, or the trademarks/logos of another company.

The e-mail or exchange should identify the content and method to be used.

*Example: “Hi, this is [name] from [brand]! We saw your [recipe/photo/etc.] on your blog and would love to share it on our Facebook page. Of course, we will attribute it to you, so please respond to this [email/message] to confirm that we have your permission to share (and that you have all of the rights in your [recipe/photo/etc.] to give us this permission). Thank you!”*

2. Written Consent. For all other situations, such as use of third-party content (a) in a channel other than unpaid social media, or in a different social channel than it originally appeared, (b) that is owned by another company, or (c) contains a celebrity or a minor, a written consent should be obtained in the form provided by Optimist International.

## B. Trademarks

Third-party brands, logos, slogans, or names should not be included in Optimist International social media content without permission from the trademark owner. This includes use of hashtags that may consist of third-party marks.

- Optimist International must independently evaluate its right to use third-party trademarks or logos. E.g., an Optimist International promotion partner may have rights to use another party’s trademark, but it can’t be assumed that Optimist International itself can make the same use or that rights can automatically be passed through to Optimist International.
- Any permissions for Optimist International to use a third-party’s trademarks should be documented in writing. If use of third-party marks is anticipated as part of a campaign, including as hashtags, Optimist International should be consulted.

## C. Social Media Platform’s Trademarks

Many social media platforms permit use of their trademarks to identify the brand’s presence on that platform, so long as the use is consistent with published guidelines. The Trademarks Toolkit should be used for guidelines on using the trademarks of a social media platform.

#### D. Sharing and Linking to Third-Party Content

It may often be appropriate to refer or provide a link to non-Optimist International content using native social media sharing functionality. While obtaining permission to link to another person's content or site is always the best practice, if done in compliance with these guidelines, linking to a third-party site or sharing third-party content through native social media functionality will typically be a low-risk activity.

These guidelines should be followed to ensure that risks remain low:

- *Link to the Original Source.* The original source of the material should be identified, rather than just a person that has shared the material online or in social media. Do not copy or edit the content from the source (e.g. don't copy parts of an article into a new post or manually take images from the source article).
- *Platforms May Automatically Pull Content from Source Articles* (e.g. when posting a link in a Facebook post, an image and text from the source page are automatically populated in the post). Content should be previewed so that it is clear if images and content have been automatically included in posts.
- *Individual Names or Third-party Marks Should be Avoided.* For example, say "we saw this great recipe for mini pizzas <link>" instead of "we saw this great Martha Stewart recipe for mini pizzas <link>."
- *An Impression of Affiliation with the Source Should Be Avoided Unless Permission has been Granted.* For example, "we saw this great recipe" is a good way to help reinforce that we don't have a relationship and we found the recipe much as a regular internet user would; "we're happy to bring you this great recipe" could imply that we have an affiliation with the source.
- *Entire Content of the Article/Page being Linked to Should be Reviewed for Compliance.*
- *The Use of the Same Site/Person as a Source without Permission should be Reviewed for Compliance.* Larger sites with more content may be looked to as sources more frequently because they have more content.
- *A Site's Terms and Language for Restrictions on Use of Content should be Reviewed.* Some sites may expressly state that commercial use of content or linking is either permitted or prohibited, or that content may be used in one channel and not another; prohibitions found in a site's terms should be respected.
- *Look for Sites that include "share," "pin it" or Similar Functionality that Indicate Interest in having Content Shared on a Particular Platform.* The presence of the button can be an important signal in whether links to a particular site are appropriate for sharing, but does not constitute a waiver of any prohibitions on commercial use that may be found in the site's terms.
- *Be Aware of Relationships the Third party may have.* The third-party site should be reviewed to identify possible relationships with competitive organizations that may suggest the site would not be receptive to Optimist International promoting the link.

**E. Quotations**

Using well-known quotations may implicate the author/speaker's copyright, as well as their right of publicity. Quotations by individuals who have been dead for at least 100 years may generally be used and attributed to the individual. Quotations that are established (through appropriate research) as not having an identified author/speaker can generally be used.

**F. Using Social Media Content in Other Channels / Media**

Taking online or social media content and using it on a different social media platform (e.g., taking a picture from Twitter or Instagram and posting it on Facebook), or in a different channel (e.g. using social media content in offline materials such as press releases, print materials, etc.) may present risks if appropriate consent is not obtained.

**G. Reusing Historical and Paid Optimist International Content**

Optimist International has created Marketing Materials subject to usage restrictions. The use of historical Optimist International content (e.g. old print ads or posts) should be cleared with Optimist International to ensure that any usage restrictions or talent obligations are satisfied.

**H. Personal Information (including license plate numbers, contact info) without getting appropriate consent should be avoided**

It is okay to use a person's name or Twitter handle in responding to a direct post/tweet from them. If announcing winners' names, it is preferable to use limited information (first name and last initial) unless consent has been given to use full name; consent can be obtained through promotion rules or calls-to-action that let users know how their name will be shared.

**I. Third-party Brands, Logos, or Names (including logos that are visible on products in a picture or video) without permission should be avoided. (See "Trademarks" section above) It is okay to include a brand that appears as part of a URL / link within a post.****J. Language that Creates or Implies an Association between the brand and another party (without actually having a relationship and getting appropriate consent) should be avoided.**

An example that could suggest a connection with the source would be "check out this great recipe from our friends at SITE - when a better choice would be "We saw this great recipe for FOOD – check it out!".

**K. Language that Implies Endorsement or Preference by the Source (unless appropriate consent is obtained) should be avoided. An example that implies endorsement would be "We saw this recipe – he must really love Optimist International products!" Also avoid placing thirdparty images in a "Fan Favorites" gallery (which could be interpreted to suggest the unrelated third party is a "fan" of Optimist International)**

- L. Statements Regarding Specific Attributes of Optimist International should be avoided. (“I lost 15 pounds once I switched to Sandwich Thins!”)
- M. Health-Related Statements that mention Optimist International should be avoided. General statements or tips about basic wellness principles that don’t refer to Optimist International may be used. (e.g., “create a playlist of your favorite upbeat tunes to help extend a workout”).

**TWITTER – Additional Guidelines for Retweeting and Replying**

- Replying to a tweet that includes an Optimist International handle (@optimist) is generally acceptable, so long as the reply does not create an association between Optimist International and the original message, imply an endorsement by the original poster, or include an additional marketing message.
  - Allowed: “@Consumer, glad to hear that!” in response to “@Optimist, I love your events!”
  - Not Appropriate: “@Consumer, great to hear Optimist International is your favorite!”
  - Not Appropriate: retweeting consumer messages, e.g. “RT @Consumer: @Optimist, I love your events”
- If a message does not include an Optimist handle, it should generally not be retweeted or replied to without obtaining appropriate consent (direct message on Twitter would be sufficient), regardless of whether it mentions the brand in text, as a hashtag, or not at all.
  - Not Appropriate: “RT @Consumer: Optimist events, I love you! #Optimist”
  - Not Appropriate: “@Consumer, thanks, glad to hear it!”
- The guidelines presented are general. Campaigns can be designed so that it is clear when consumers are intending to engage in social media – such as calls-to-action that encourage use of a unique hashtag - where it is clear that a consumer wants to engage, there may be more latitude in how to retweet or interact with consumers on Twitter. Optimist International should be consulted for specific guidance in the context of a specific program.

**PINTEREST AND INSTAGRAM – Additional Guidelines for Pinning, Re-pinning, “Regramming” & Commenting**

The General Guidelines for Social Media Posts and guidelines for the use of minors in images should be observed as well as the following when using Pinterest and Instagram:

- Only pin, re-pin, or “re-gram” content that Optimist International has appropriate rights to use, which is content:
  - that Optimist International owns or created;

- that Optimist International has sourced from an active media partner or a retail partner with permission;
- provided to Optimist International through a contractual blogger relationship or consumer promotion with appropriate terms; or
- where it's clear that the actual content *creator* (not necessarily the person who originally pinned it) has given permission for sharing – e.g., through terms on their site or other context
- Optimist International is responsible for confirming appropriate rights from the original source to make use of content that is from Instagram, Pinterest or is Pinterest-enabled on a website. Pinning event images from an Optimist International photo or video shoot is allowed while repinning an image from a blogger's Pinterest board or "re-gramming" from another person's Instagram account may not be allowed without obtaining permission.
- Commenting or liking another Instagram or Pinterest user's images can be seen as an endorsement; therefore commenting on or liking any pins or descriptions where users make claims about the specific characteristics of an Optimist International event, or that compares to a competitor's event should be avoided.
- When permission has been obtained to use an image, the source should be provided. A log should be kept of all pinned and re-pinned images with associated original source, date pinned, relevance and any other credits for Optimist International's records. Photo courtesy of S. Lee at [www.URL.com](http://www.URL.com) is appropriate but photo courtesy of [www.google.com](http://www.google.com) would not be used.
- Descriptions of pinned images should be accurate, relevant and not suggest anything misleading. To ensure that descriptions are accurate, avoid using hashtags that do not apply to the post, or language that could improperly suggest sponsorship or endorsement with the content or its owners.
- Fake comments/reviews should not be solicited or planted. It is not appropriate to "create buzz" for pins or boards by having other members, agency employees, or others re-pin, like, or comment on pins or boards. Pinners that are being followed should be reviewed periodically to ensure that offensive or illegal content is not being used.

(Jun 2020)