

# Developing Social Media Policies: A Team Learning Approach

**Jennifer Amanda Jones**  
*University of Florida, USA*

## EXECUTIVE SUMMARY

*Nonprofit organizations engaged in social media outreach face numerous risks. One way to minimize risk is to develop policies and procedures. Social media policies have gained popularity in recent years but little research has been conducted about their effectiveness. As a result, nonprofit organizations often develop social media policies without the guidance of best practice models. The Vista Community Clinic responded to this challenge by developing a Technology Outreach Committee. The committee, which includes employees from a variety of programs and departments, meets regularly to discuss strategies, identify challenges, and brainstorm solutions. As this case documents, a team learning approach allows the organization to incorporate diverse skillsets, manage the creative tension between a somewhat bureaucratic organization and a highly fluid social media environment, minimize risks in high risk patient/client outreach, and garner employee confidence in the policy.*

## INTRODUCTION

By 2009, 97% of the largest United States nonprofits were using social media to communicate with constituents (Barnes, 2010). In addition to the benefits of communicating via social media, many of which are documented in other chapters in this book, there are numerous risks associated with nonprofits' use of social media

(Palfry, 2010; Cohen, 2013). One indication of risk, in the United States at least, is the fact that courts have yet to weigh in on most social media issues. For example, it is still somewhat unclear how the Health Insurance Portability and Accountability Act (HIPAA) will be enforced in an era of social media use or how the courts will respond to human resource concerns which emerge and/or are investigated via social media. Until the legal interpretation process is mature, organizations engaged in social media operate in uncharted territory when they venture into areas such as patient/client confidentiality, employee safety, employment practices, and the blurring of professional and personal lives.

One way to manage risk is through the adoption of policies and procedures that, in one way or another, regulate activity, in this case a nonprofit's use of social media. At this point, however, this tool appears to be underutilized, even in the for-profit sector. A recent study of the Inc. 500 (Barnes & Lescault, 2012) found that while more than 90% of the Inc. 500 companies used social media; only 24% had developed social media policies. Although little empirical data is available, it is safe to assume that nonprofits are just as unlikely to have developed social media policies. Furthermore, even if an organization has a social media policy, it is difficult to determine whether it is effective. To date, little comprehensive research has been conducted on social media policies and, as a result, there are few well-documented best practices for nonprofit organizations to follow.

This chapter outlines the process undertaken by one nonprofit organization, the Vista Community Clinic (VCC), to develop and revise social media policies in the absence of research or well-established best practices. As will be described in this chapter, the VCC provides healthcare and health education to more than 57,000 low-income and marginalized individuals in North San Diego County each year. The clinic has used social media since 2009 to (a) increase awareness among community members about the nonprofits' mission; (b) provide health-related education and resources; (c) conduct health-related outreach to high-risk populations; and (d) encourage the medically underserved to access low-cost healthcare services, including cancer and disease testing, at one of the clinic's five sites. Much of the social media outreach conducted by VCC could be considered high-risk in that staff are addressing sensitive subjects with individuals who have been or felt marginalized for a variety of economic, social, or cultural reasons.

This chapter begins by briefly describing the theoretical framework of team-based learning, the process informally adopted by the clinic in 2009. Then it discusses the methodology by which this case study was developed, followed by a description of the size and scope of the VCC, paying special attention to the specific programs engaged in social media use. After describing the composition and formation of the Technology Outreach Committee, the chapter reviews academic and practitioner research regarding a number of key risks identified by the committee. These risks

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