THE DALLAS CHAPTER OF THE INSTITUTE OF INTERNAL AUDITORS

THE DALLAS IIA SOCIAL MEDIA POLICY

The Institute of Internal Auditors Dallas Chapter

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Contents

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Introduction to Social Media

Social media and collaborative Web 2.0 platforms provide our organization many different ways to engage with members of the Dallas IIA, professionals, and facilitate a two-way interaction. Dallas IIA Governors, Officers, volunteers, and members are using social media including Twitter, LinkedIn, Webinars, and video messages to enhance communication with other professionals. These outlets allow those involved with operating the Dallas chapter of the Institute of Internal Auditors (IIA) to reach a wider audience and provide useful updates and information to cultivate our network of internal audit professionals.

We encourage our members, Governors, Officers, and volunteers to actively participate in this growing source of information, interaction, and ideas in order to continue to be recognized as one of the leaders of social media within the IIA chapters.

The Dallas IIA's Social Media Policy is designed to help you understand:

- The Dallas IIA's strategy for social media content
- The expectation of site administrators and users
- How social media enhances the achievement of our organization mission and goals

About the IIA

Established in 1941, The Institute of Internal Auditors (IIA) is an international professional association with global headquarters in Altamonte Springs, Florida, USA. The IIA is the internal audit profession's global voice, recognized authority, acknowledged leader, chief advocate, and principal educator. Generally, members work in internal auditing, risk management, governance, internal control, information technology audit, education, and security.

Globally, The IIA has more than 180,000 members. The IIA in North America comprises 160 chapters serving more than 70,000 members in the United States, Canada, the Caribbean (Aruba, Bahamas, Barbados, Cayman Islands, Curacao, Jamaica, Puerto Rico, and Turks & Caicos), Bermuda, Guyana, and Trinidad & Tobago. Members enjoy benefits offered by the North American Service Center including local, national, and global professional networking; world-class training; certification; standards and guidance; research; executive development; career opportunities; and more.

Mission of the IIA

The mission of The Institute of Internal Auditors is to provide dynamic leadership for the global profession of internal auditing. Activities in support of this mission will include, but will not be limited to:

- Advocating and promoting the value internal audit professionals add to their organizations.
- Providing comprehensive professional educational and development opportunities, standards and other professional practice guidance, and certification programs.
- Researching, disseminating, and promoting knowledge concerning internal auditing and its appropriate role in control, risk management, and governance to practitioners and stakeholders.
- Educating practitioners and other relevant audiences on best practices in internal auditing.
- Bringing together internal auditors from all countries to share information and experiences.

Visit theIIA.org for more information!

Application of the Guidelines

The Dallas IIA's Social Media Policy sets forth the appropriate and acceptable manners of social media use and participation by the Dallas IIA's volunteers, members, and speakers.

Due to the nature of the evolving definition of social media tools and sites, for the purposes of this Policy, references to "social media" will include any one of the broad scope of online communication channels and tools that allow and/or facilitate various means of interaction, communication, and information sharing, such as:

- Twitter
- Facebook
- LinkedIn
- YouTube
- Dallas IIA website
- Webinar's
- Dallas IIA eNews

Also for the purpose of this policy, "post" or "use" will mean electronic interaction, communication, and information sharing by users via social media through such avenues as:

- Status updates
- Twitter or blog posts
- Video messages
- Photographs
- Graphics
- Comments
- Ratings
- Messages
- Text files, PDFs, presentations
- Advertisements for events, conferences, meetings
- Logos
- Any other mechanism that is published, posted to, uploaded to, downloaded from or accessible from a variety of social media sources.

It is important to keep in mind at all times that Dallas IIA operates under a Code of Ethics and requires strict adherence to all applicable laws with respect to intellectual property (trademarks and copyrights), disclosure/confidentiality, defamation, harassment and invasion of privacy. The legal guidelines provided herein do not constitute any type of legal counsel.

The Dallas IIA is presenting its Social Media Policy strictly as a helpful resource for its members, volunteers, officers, and other professionals. The Dallas IIA does not accept liability or responsibility for any actions taken solely in response to or under any of these guidelines.

The Dallas IIA's Social Media Presence

The Dallas IIA currently has various social media outlets that are used to spread current events, news regarding chapter events, updates from the Institute of Internal Auditors, and promote the internal audit profession. Our current social media presence includes:

- **Dallas IIA Website:** The Dallas IIA's official website is: **http://dallasiia.org/**
- **LinkedIn:** The Dallas IIA uses LinkedIn to encourage members to network, search for jobs, seek advice from peers, and request personal recommendations.
  - o **LinkedIn Individual Page**
  - o **LinkedIn Group**
- **Twitter: The official Dallas IIA Twitter** account is **@TheDallasIIA.**
- **Facebook:** The Dallas IIA uses Facebook to reach anyone working or interested in the internal audit industry, attending a Dallas IIA event, or obtaining updates on current events that are of interest to those in this profession.
  - o **Facebook Individual Account**
  - o **Facebook Page**

The Dallas Chapter of the IIA reserves the right to create or use any social media sites not specifically named above at the discretion of the Board of Governors, Officers, and volunteers.

The Dallas IIA has a volunteer position titled the Communications Chair, who is responsible for organizing and running the Communications Committee as well as the social media efforts, Monthly eNews, and other related duties. The Communications Committee is made up of individuals that volunteer their time to develop, identify, or write social media content. These individuals are responsible for ensuring that social media content is accurate, interesting, relevant, and informative.

Creating Social Media Content

The Dallas IIA's social media strategy is to have timely, reliable, cutting edge posts that are a benefit to members. In order to recognize our members for their accomplishments or contributions, the following information is the Dallas IIA's property and right to publish:

- Pictures of individuals taken at events, submitted for biographies for speakers, panel discussion representatives, or otherwise provided to the Dallas IIA may be posted on our social media sites or website.
- Names of members, volunteers, speakers, etc.: The Dallas IIA has the right to post names of members, speakers, volunteers, etc. on the website and social media outlets. We frequently recognize our new certificate holders at monthly meetings by taking a picture and posting those individual's names on our website, eNews, and social media. In addition, we welcome our new members by name on the monthly eNews as recognition to those who have decided to purse professional involvement within this industry.

In addition, the Dallas IIA Communications Committee posts content related to the following:

- Links to websites, news articles, or other relevant information
- Updates regarding IIA information, certification updates, or the Dallas IIA
- Promotions for other events, conferences, or continuing professional education (CPE) courses

Unless expressly stated by the chapter, these types of information can be posted to the public. If you do not want your name, email, photograph, or other information shared, please contact the Communications Chair at communications@dallasiia.org.

Monthly eNews

As a part of serving our members, the Dallas IIA prepares a monthly electronic newsletter to all members in our database. The monthly eNews is sent approximately two weeks prior to each monthly meeting, in order to promote the monthly meeting, updates from IIA international, inform our members of CPE events, membership offers, and any other information we want to disburse to our members. Generally the eNews contains the following, content but is not limited to:

- The President's message or video
- Monthly meeting schedule
- Social media updates
- News from UT Dallas
- News from the IIARF (Institute of Internal Audit Research Foundation)
- Updates from the Academic Relations committee
- Information regarding certification, new certificates, and reporting requirements
- CPE opportunities, training sessions, community service opportunities
- Career opportunities in the metropolis area

The listed topics above are a guideline of the types of information that is disbursed to our members on a monthly basis. The eNews is always evolving and continuing to add new types of topics that our members are interested in. If you are interested in becoming a contributor, please contact the Communications Chair at communications@dallasiia.org.

Our Strategy for Communicating via Social Media

1. **Know our members:** Our intention is to know our members and what they want to hear via our social media channels. We strive to hear our members' comments, feedback, and continuously improve and develop content that is relevant and directly pertains to our members.

2. **Write what we know:** The Communications Committee is made up of individuals who are currently practicing internal audit and are actively engaged in continuing their professional education, being competent and exceling in the industry, as well as, obtaining and retaining professional certifications in order to be seen as experienced professionals. This directly supports our strategy to write what we know and know what we are writing!

3. **Contribute Value to the Internal Audit Community:** We stride to be the leading source of information for our members, other chapters, and professionals in the internal audit profession by contributing valuable insights, implementing progressive ideas and strategies, and being known as a leading chapter using social media to promote the profession and the IIA.

4. **Be Conversational:** The administrators and the posts from the Dallas IIA are intending to spark and promote conversation, discussion, and interaction among the chapter and members.

5. **Be Creative and Original:** The Dallas IIA Communication Committee works to create creative and original posts to intrigue others and draw interaction to the topics and subjects that are posted.

6. **Avoid Starting Confrontations:** We encourage different opinion and points of view without the intention to starting a confrontation. The Dallas IIA is cautious and considerate of sensitive subjects and works to avoid provoking or offending others. A good rule of thumb is that once statements or words are released on the Web, they cannot be retracted or erased completely, so all volunteers, members, and professionals should keep this in mind when responding, reacting, or posting on social media sites.

7. **Accountability:** We all make mistakes. If we make an error in our social media posts, the best practice is to admit the mistake quickly, correct it and move on. If it's misinformation, we will go back and give the right information to the community and our followers. We are accountable to the content that we post and to our members, therefore, we will take ownership of these mishaps.

Participation: Respect, Responsibility, and Appropriate Content

The Dallas IIA posts social media content to our relevant sites (as listed above) for the benefit of its members and the public. A warning to users that may be individually liable for anything they communicate using the social media sites, including but not limited to defamatory, discriminatory, false, or unauthorized information. Users are also cautioned that they are responsible for complying with the requirements of applicable copyright and trademark laws and regulations. The Dallas IIA reserves the right to edit or remove offensive posts and block users as deemed necessary. We encourage all members to exercise their professional judgment before posting or commenting on the Dallas IIA's social media sites as well as their personal sites, as there can be consequences for such posts.

The Dallas IIA seeks to ensure the integrity and professional standards reflective of the profession through its social media presence and website. Therefore, use of these platforms is limited to participants who agree to adhere to the following guidelines:

1. Abstain from transmitting any message, information, data, or link to a website that is unlawful, threatening, harassing, defamatory, or obscene. The Dallas IIA invites and encourages a respectful exchange of ideas and reserves the right to remove or edit a post containing such material or links to sites we deem offensive, explicit, or obscene. However, the Dallas IIA does not have the ability to restrict users' communication prior to posting and therefore cannot guarantee immediate deletion or editing of offensive posts.

 2. Users must not post material that infringes on the rights of any third party, including intellectual property, privacy, or other rights. Plagiarism or other violation of copyright laws is prohibited.

 3. Do not post or transmit any promotional materials, spam, chain mail, or other form of solicitation. The Dallas IIA reserves the right to delete these posts immediately.

4. The Dallas IIA values privacy and encourages users to avoid posting their own or other's personal information such as address and telephone number unless pre-approved by the Dallas IIA and expressly authorized by involved parties. Similarly, these platforms are not to be used for solicitation of personal information from other users. Requests for information for purposes such as surveys or posting job opportunities must be pre-approved by the Dallas IIA.

5. Users should be aware that the opinions expressed by users of the social media platforms do not necessarily represent the opinions of the Dallas IIA or the Institute of Internal Auditors International. Users also agree that the Dallas IIA is not to be held liable for any loss or injury caused, in whole or in part, as a result of users' posts.

Legal Compliance

Anything published on any social media outlet, including those owned by or affiliated with Dallas IIA, should comply with its terms of use or service, and with all local, state and federal laws and regulations, only some of which are specifically addressed in this policy. It would be unreasonable to list all relevant laws/regulations, but notable examples include:

- Copyright laws restricting use of photographs and graphics created/owned by others without appropriate advance permission unless it is a retweet or a "share" which gives credit to the creator;
- Posts made on any social media pages owned by Dallas IIA by unaffiliated persons belong to Dallas IIA;
- Persons receiving awards for accomplishments from Dallas IIA can be published in full name and photo if the award was accepted unless the said persons make a written request to Dallas IIA.
- Trademark laws restricting when and how a third-party's trademark(s) can be used without permission.
- Privacy laws restricting use and sharing of certain non-public or personal information about others.
- Defamation laws precluding reputational damage to others.
- Laws prohibiting statements that are obscene, discriminatory, threatening, harassing or false or misleading.

Forward Looking Statement

Social media continues to evolve with the continued development of communication and technological innovations, which presents both exciting opportunities for our chapter and also challenges. As a committed chapter of the IIA International, we are dedicated to providing members, volunteers, and officers with an outlet to share updates, advice, and a place to promote our events while also protecting our users. Any social media outlets not specifically stated in this policy are still appropriate and deemed reasonable for the Dallas IIA's use. We are not limited to the use of the social media outlined in this policy.

As the social economy expands and new forms of social media appear, we will continue to enhance our outreach to our audience. We will update our policies, as needed, and take initiatives to be proactive on behalf of the organization to better serve our members and internal audit professionals.