MC/10/02

Social Media

Basic Information

Contact Name and Details	Toby Scott, Director of Communications and Campaigns x5221
Status of Paper	Final
Action Required	For Decision
Draft Resolution	The Council adopts the guidelines for use in the bodies and situations over which it has jurisdiction, and recommends them to the Conference for adoption in other parts of the Methodist Church
Alternative Options to Consider, if Any	

Summary of Content

Subject and Aims	The background paper shows how the Church is already active in social media. The guidelines paper sets out how staff or officers of the Church should behave when using social media. The goal is to ensure that the Church and individuals engage positively with social media but do nothing to harm the reputation of the Church.
Main Points	Social media are a great boon when used well. All involved should do nothing to bring the Church into disrepute. Members of governance bodies have particular responsibilities in how they report from or during meetings.
Background Context and Relevant Documents (with function)	*Speaking for the Methodist Church* (Conference 2001)
Consultations	A selection of existing Methodist bloggers

Summary of Impact

Standing Orders	The guidelines should appear as an appendix to *Speaking for the Methodist Church* and as a document on the Connexional website. Nothing in these guidelines changes any existing standing orders.
Faith and Order	The Faith and Order Secretary has seen and commented on the papers.
Financial	None.
Personnel	Breaking the guidelines repeatedly would be a disciplinary matter that could lead to dismissal.
Legal	The paper discusses online defamation as one risk.
Wider Connexional	Bringing the Church into disrepute is already grounds for a complaint against anyone in the Church. This paper makes clear that online media could give rise to such a complaint.
External (e.g. ecumenical)	
Risk	Failure to address this could lead to reputational damage to the Church.

Respectful, responsible, representative - Social media guidelines for the Methodist Church

Summary and introduction

The purpose of this paper

1.1 This report, and a background paper providing an overview of current online social media, comes at the request of the Strategic Leaders and the Connexional Leaders Forum. As noted in section 3 below, it does not propose any new or amended Standing Orders, but it does propose guidelines on how existing Standing Orders and other Conference and Council reports could be interpreted when applied to this new area.

1.2 This guidance would be subject to existing complaints and disciplinary procedures as set out in CPD. Due to the rapidly developing culture of social media and technological advances these guidelines will develop over time.

1.3 Reviewing the policies of other organisations demonstrates there is no consensus on how to respond to social media developments and trends. For example, the BBC's guidelines cover nine pages (and also include at least two other documents of greater length): the Civil Service's guidelines run to less than 300 words. This paper has sought to be as succinct and clear as possible while being as thorough as necessary.

1.4 It is worth repeating that social media offer great opportunities in all parts of church life, as means of communications with others, among ourselves and as organisational tools. The goal of these papers is not to attempt to quash the creative uses of these, nor to stand Canute-like in the face of social change. Rather, they attempt to encourage and enable the best uses, whilst helping all involved to avoid to pitfalls by making clear what we as a Church see as acceptable behaviour and best practice.

Who this applies to

2.1 This guidance applies to all employees, officers and ministers of the Church. Different groups within that have different responsibilities, and their actions may have different consequences. The provisions applying to the Connexional Team apply to all staff, including temporary and part time staff.

Speaking for the Methodist Church

3.1 This policy is based on the principles set out in 'Speaking for the Methodist Church', adopted by the Conference in 2001, and the guidelines for Connexional Team staff agreed by the Council in 2008. It is understood that repeated or deliberate violations of the Speaking for the Methodist Church principles could be grounds for disciplinary action for Connexional Team staff. For other office holders, they form best practice guidelines.

Principles

4.1 As well as the principles set out in Speaking for the Methodist Church, this paper is based on the following:

i. Social media technology is changing rapidly, and so are the social attitudes that accompanies it. This is especially but not only true of younger generations. As a result, any attempt to generate rules based on current technology may be quickly out of date. These guidelines do not recommend any changes to standing orders since any attempt to be specific is likely to be quickly out of date. Instead they rely on the use of common sense, and on existing supervision structures within the Church, as applicable.

ii. Methodist discipline relies on trust, rather than policing. These guidelines therefore as far as possible trust in people's common sense.

iii. Actions that are deliberately damaging or hurtful to the Church, to an individual or group within it, or that bring the Church into disrepute are already potentially disciplinary matters, whether they are carried out online or not (e.g. Standing Order 1100 gives "ways which are damaging to themselves and others and which undermine the credibility of the Church's witness" as examples of things that give rise to complaints.)

iv. These guidelines do not replace or supersede any existing standing orders.

v. Social media do not change our understanding of confidentiality or what is or is not acceptable to say. The Church expects all involved to respect confidences when they are included in them. Similarly, something that would be unacceptable to print in a circuit newsletter or the letters pages of the Recorder – for example – would be unacceptable to publish online.

vi. Increasingly, people with an existing personal online presence are assuming paid or voluntary roles within the Church. The Church cannot expect that all of this is consistent with what we would want to say on any given topic. How people reconcile their past online writings with their role in the Church is for them and their line manager or other person to whom they are accountable in the first instance.

vii. These guidelines should not limit or prevent constructive debate or discussion through social media. People should be free to engage in discussions and debates within and beyond the Church on any topic, but should also remember their responsibilities to the Church or to any bodies they are members of when they do so. There is a wide range of opinion within the Church on some topics, and one of the attractive features about Methodism is our ability to disagree constructively.

viii. There is a fine line between acceptable and unacceptable behaviour online, and this line will move with time. One of the benefits of a healthy online community is that it is this community that provides the best guidance to others and to itself. The aim of the Church should therefore be to foster healthy and active online and social media.

Guidance for different groups

Connexional Team staff

5.1 Connexional Team staff are bound by 'Speaking for the Methodist Church' and its appendices. Repeated failure to follow these documents can lead to disciplinary action, and the same will be true of the following guidelines on social media.
Be *responsible*

i. Engaging in social media for your own purposes should be done in your own time. Even social media used in your own time and on your own equipment has the potential to raise disciplinary issues. The easiest way to prevent most problems is to state that the views being expressed are your own and not the Church's, but you still need to avoid making statements that could bring the Church into disrepute.

ii. Staff may only respond to or participate in social media for Church purposes either as an explicit part of their job description, or with permission of their line manager. In the latter case, this might either be a blanket approval or on a case by case basis. The staff member and line manager should agree roughly how much time this should take, and review regularly to make sure that this limit is realistic and being met.

iii. The Church aims to have a single spokesperson on any topic. If that isn't you, you should at least find out who that person is and see how they might respond if you were to speak on the issue, or ask if it would be more useful for them to respond in their own name.

iv. Don't share anything inappropriate about yourself, colleagues or any projects that are not yet ready to be publicised. Treat things you learn at work as confidential unless explicitly cleared to talk about them publicly.

v. You are ultimately responsible for your online activities; both the content and the time spent. If either or both of these do not meet acceptable standards, then your line manager will raise it as a concern. If the unacceptable behaviour continues, then you could face disciplinary action.

Represent the Church properly

vi. Above all, remember that we are a Christian Church. Whatever your own faith story, do not do or say anything that damages or undermines our reputation as a Church, and respond in all ways with Christian love.

vii. Clearly state your name and position with the Church. Do not take part anonymously, or under an alias (except as noted below in section 9)

viii. Where possible, link to relevant papers, such as Council or Conference reports, fact sheets, press releases or foundational documents, especially if the Conference has adopted a statement on a particular topic, therefore making it the official position of the Church.

ix. Be professional in all your online activities. Check your spelling and grammar, don't be offensive or say anything improper. Make your arguments clearly and truthfully. Even if people disagree with what you say, they should be impressed with your manner. Don't do or encourage anything illegal or improper.

Respect

x. Respect others and their beliefs and positions, even where you disagree.

xi. Make your cases and arguments constructively, factually, and with respect for the need for good quality public discourse. Be truthful and honest.

xii. Respect the outcomes of our governance processes, which are based on democratic and representative principles. You should not undermine a governance outcome you disagree with. If you feel you must discuss it, then do so constructively, stating the official position of the Church first and then stating clearly why you disagree.

Ministers and other office holders of the Church

6.1 As noted above ministers (presbyters and deacons) and other office holders are in different positions to that of Connexional Team staff. In practice this means that these groups have more freedom than Connexional Team staff, but the principle that all are responsible for what they write still applies. The core summary of being responsible, respectful and good representatives of the Church remains true, but different people will have different ways of following this in practice. Standing Order 740 clauses (2) and (3) give an outline of what the Church expects of those admitted into full Connexion or recognised and regarded and of probationers.

6.2 Other points relating to these groups:

i. It is not always easy for anyone outside the Connexional Team to know who the designated spokesperson is on a particular topic. Nor it is reasonable to expect someone addressing a topic for the first time to immediately know all recent statements, resolutions etc. However, SO740(2) does make it clear that presbyters and deacons should study the Conference's proceedings and make its decisions known, and therefore can be expected to bring this information to an online discussion or statement where appropriate. It is also reasonable to expect someone who intends to, or finds themselves having to, address a topic repeatedly or in depth to spend time researching what the Church has said about that topic.

ii. People should make their position within the Church clear from the start.

iii. We can make a useful comparison with the letters page of the Methodist Recorder that ministers and other office holders have long contributed to. This is a place for useful discussion and debate, and provides a platform for a variety of opinions. However, we would expect letters to the courteous and factual, for correspondents to identify themselves honestly and the discussion (as moderated by the Methodist Recorder) to follow reasonable standards of behaviour.

Members of governance and other bodies

7.1 It has been possible for anyone with a mobile phone to exchange messages from within a meeting with someone outside for over a decade, and we have no way of knowing how much of that has gone on. The difference with today's technology is that one person can now share their thoughts with many.

7.2 Public meetings such as the Conference in open session can in principle be "live blogged" by anyone in the public gallery. However, governance bodies should consider adopting the following depending on their particular needs:

i. The prime duty in participating in a governance body is to contribute to this body's Christian conferring and decision making, and its members should not be distracted by any social media or communications beyond the room.

ii. All governance bodies, committees and other bodies of the Church should make clear to members, visitors and supporting staff the terms under which they meet. The following statement, a variation of the Chatham House Rule, should apply unless a body chooses explicitly to adopt a different statement, or when it meets in public. *"When a meeting, or part thereof, is held under this rule, participants are free to use the information received after the end of the meeting, but neither the identity nor the affiliation of the speaker(s), may be revealed."*

iii. The above statement precludes any discussion of the debates or outcomes during the meeting. Members of governance bodies should be aware of the intended official communications of their work, if any. Further discussion of the meeting should wait until after the official communications have been issued if those are done soon after the end of the meeting. At present these are:

    a. The Conference: Live audio and tweets, press releases on major topics, daily informal report from a member of the Conference, aide memoir and Conference summary sheet. Daily record is published each day.

    b. The Council: Press release issued same day as the end of the meeting; report in the Recorder.

    c. The SRC: minutes published as part of the papers of the following Council.

iv. Members of governance bodies should not record and share any photographs, video or audio of other members of the body or guests without their permission, and even with permission nothing until after the end of the meeting.

v. Members of all governance bodies should remember that speakers may take positions or raise points during debates that are very different from existing Methodist positions or the final position agreed by the body. To share these beyond the room, even without attribution, without the context of the wider discussion or debate runs a real risk of them being misinterpreted, or of being mistaken as "official" when they are not.

vi. Any confidential matters, items discussed in closed session or personal or staffing issues should not be discussed at all outside the room.

The Council

7.4 The Council meets in private, but its papers are available online before it meets and its decisions are widely reported: a press release, a summary article in the Methodist Recorder and the formal minutes published before the next meeting. At present the press release contains quotes (usually from the General Secretary or Assistant Secretary of the Conference) about the Council's work but not from the discussions, and the minutes record the outcomes of the meeting. But the Methodist Recorder article, which aims to both tell what the Council has done but also to make its work accessible to a wider Methodist audience, is written in a less formal style and sometimes does say who took part in particular discussions, although it does not attribute particular positions or statements to named individuals.

7.5 The Council also is a representative body that meets in private. Many of its members have a duty to report back on its decisions. It is widely assumed, but not stated, that the Council meets under the principle of collective responsibility. Therefore all members have a duty to support the outcome of its decisions even if they were opposed or voted against.

Monitoring, whistle blowing and aliases

Monitoring and reporting other online activity

8.1 Staff, ministers and others may follow the online activities of others even if they do not contribute themselves. In doing so they might come across erroneous claims that ought to be corrected or in appropriate personal information. In these cases, a judgement is required as to what to do with the information. Information that could be useful or should be corrected should be referred to the member of the Team with responsibility for that area or work.

8.2 In the case of pastoral issues, care should be taken. Concerns should not be ignored, and if the person is known to the reader then a private personal contact is the best first course of action. If the reader does not know the writer well enough to feel comfortable to this, then it is best to send the information to the writer's line manager or equivalent.

8.3 Section 17 of CPD (pp777-782 of the 2009/10 edition) contains guidance on handling sensitive or confidential pastoral care issues, including advice on social media, and should be studied by anyone involved in such matters.

Whistle blowing

9.1 The whistle blowing policy for Connexional Team staff makes clear that anyone who suspects fraud or other impropriety by a member of the Connexional Team should, in the first instance, raise the matter confidentially with the General Secretary, one of the Strategic Leaders or the Secretary of the Strategy and Resources Committee (SRC). This initial contact can be in person, by phone or by email and the policy guarantees that the matters will be dealt with confidentially and respecting the anonymity of the original whistle blower where possible. Once raised, the issue will be investigated, first a preliminary investigation by the person receiving the complaint, and then a full investigation if the complaint appears to have foundation. The original whistle blower will be kept informed of the final conclusions and any action taken, and can appeal to the SRC if she or he is unsatisfied by the outcome. The policy makes clear that all concerns raised will be taken seriously and acted on promptly, and that it demands that all staff in all areas of work operate to high standards of conduct and integrity.

9.2 In keeping with this policy, it would be wrong for anyone with reason to suspect improper behaviour by a member of the Team to raise it via social media in the first instance. To make a complaint or allegation of that sort of serious wrong doing against a member of the Team without allowing the Church to first hold a proper investigation is unfair to the individuals involved and to the Church’s processes.

9.3 If the processes are exhausted and the issue has not been resolved to the satisfaction of the whistleblower, then the policy does not prevent anyone from making concerns or complaints public after the process is complete.

9.4 The current whistle blowing policy dates from September 2005. Work is currently underway on a possible updated version.

Aliases and anonymity

10.1 As noted above, participation in social media by Connexional Team staff should never be anonymous, and this is also best practice for all others. The use of aliases by Connexional Team staff for social media as part of their work is also prohibited. However, in the online world some people have an established alias that works as shorthand for them or their site. Using such an alias is fine, as long as their real identity and position within the Church are easily discoverable by anyone visiting their site. The use of an alias as a shorthand is acceptable: the use of an alias to disguise, hide or confuse an identity is not.

Recommendation: The Council adopts the guidelines for use in the bodies and situations over which it has jurisdiction, and recommends them to the Conference for adoption in other parts of the Methodist Church

Social media and the Methodist Church – Background paper

A: Summary and background

1) The issue

1.1 Social media – online communities or discussion forums – are an inescapable fact of modern life. They present risks and potential benefits to the Church. In order to limit the risks while realising the benefits for the Methodist Church some common sense guidelines are useful to help Connexional Team staff and all those representing the Methodist Church to make wise decisions about their use of social media.

1.2 At the heart of this issue is an understanding that new technologies, such as these, still require Methodist members, office holders and staff to abide by the discipline of the Church. In particular, all need to ensure that they do not do anything that brings or could bring the Church into disrepute. In addition to this guidance other relevant standing orders apply to online activity as much as they do other tools of communication.

1.3 The nature of social media means the distinction between public and private conversations can be blurred. Communication in this form also happens a lot more quickly than many other forms of communication, which brings both benefits and hazards to individuals and the organisations they work for or support.

2) Background

2.1 The last decade has seen a rapid growth in what is broadly known as social media. This includes personal weblogs, Facebook, MySpace, Twitter and other web-based formats, some little known, some fading former giants and some new ideas that might become huge in the future. They enable ordinary people to put their own views, opinions or ideas online, or to make links through to other websites. Most of these are based on websites accessed through a computer, but increasingly some (notably Twitter) can be updated from an ordinary mobile phone. At the same time, increasingly powerful mobile phones such as the iPhone enable people to both read and write to these websites on the move or from in a meeting.

2.2 Websites such as YouTube and Flickr also make it easy to share and to view videos and photos free of charge. These are also easily shared amongst social networks through Twitter, Facebook etc. and can be viewed on iPhones and other advanced mobile phones.

2.3 The social dimension is based on the premise that people will use it in part to engage with others, whether those are friends or complete strangers. This is mainly done either by responding to other people’s ideas on your own site, or by leaving a comment on other people’s sites. Most sites give people a degree of control over comments: they can allow or deny comments altogether; they can allow them to be anonymous or require a username; they can choose to allow the comments to appear immediately unedited, or to apply some control over what does or doesn’t appear.

2.4 Many staff in the Connexional Team, as well as ministers and other office holders across the Connexion, have blogs or are signed up to Facebook, Twitter or one of the other alternatives. It is impossible to police or prevent this activity undertaken in a personal capacity, but there must be clear common sense guidelines in place to ensure that it does not bring the Methodist Church into disrepute or undermine the Church or breach confidentiality. The guidelines are intended to set out expected behaviour and to ensure that online activities, as individuals and as a church, reflect the Christian faith that the Methodist Church seeks to nourish.

3) Existing Methodist involvement in social media

3.1 At present, the Church has a number of official social media activities.

I. The weblog of the President and Vice President of the Conference.
Now in its third presidential year, the weblog allows the President and Vice President to write about their visits around the Connexion and overseas, and to post photographs. This enables readers to feel connected to what the President and Vice President are doing via the website, and feel part of the Connexion. Office holders have enthusiastically embraced the weblog. Training and support is given by our Internet communications team. The site currently has about 300 unique visitors a week, up 30% from last year.

II. Youth President's blog.
This is similar to the President and VP blog and will be relaunched at the start of the new Youth President's term of office. It currently has about 40 visitors a week.

III. Methodist Conference Twitter Feed
Launched in 2009, this had over 150 users following its live updates on resolutions passed. (For more detail on Twitter and how it works, see the glossary at the end of this paper.) The use of Twitter at Conference is circumscribed by the Speaking for the Methodist Church principles: anything beyond factual reporting (e.g. "Resolution 23/1 passes") ought to be signed off. The greatest benefit of a Twitter stream is the speed of the reporting.

IV. Inter Faith blog
This is a new blog launched by Inter Faith Coordinator, Joy Barrow. It does not allow comments, and we do not yet have any usage figures.

3.2 There are many advantages to social media, and the 2009 awards to Methodist bloggers at the Christian Blog Awards are good news not only for the individuals involved but also a sign that the Church is engaging with these media. We encourage further development of these in all areas of church life. There are over 350 million Facebook users worldwide, and many more using other social and electronic media. We cannot hold back this tide, and by avoiding the more obvious pitfalls we can make best use of the opportunities offered.

B: Risks and benefits of social media

4) Risks of using social media

4.1 Legal

4.2 The High Court recently served a court order on an anonymous Twitter user via their Twitter feed (http://news.bbc.co.uk/1/hi/8285954.stm). This follows the precedent in UK for court orders to be served by email or fax. One of the points in order was to force the anonymous Twitter user to reveal their identity. This follows an earlier court case brought by The Times newspaper which forced a blogger using an alias to reveal their true identity (http://www.theregister.co.uk/2009/06/16/times_blogger_anonymity/)

4.3 At the moment, defamation law in England and Wales states that each time a web page is viewed it becomes a published entity, and anyone defamed by it has 12 months from that point to bring an action. Web pages are essentially permanently open to libel actions until 12 months after they are taken offline. This means that any libellous material online always risks legal action because it is permanently "published," - unlike printed material which is usually only published once.

4.4 Defamation – which in an online context would be libel – is in England and Wales famously skewed in favour of the plaintiff. The defendant has to prove that the comments were justified – in other words they have to prove their own innocence. The plaintiff only has to prove that their reputation was damaged. Defamation is a civil matter, and damages are potentially unlimited, although these days awards above £100,000 are rare. But the costs of defending against defamation are very high, so that many people settle out of court.

4.4 Anonymity

4.5 As noted above, there is no legal protection offered by posting either anonymously or under an alias. While many bloggers use an alias either for themselves or as a shorthand way of referring to their site, most make their true identity easy to find. Some sites, such as Facebook, use people's real names throughout, although of course it is always possible to register using a false name.

4.6 The blogging community has mixed views of anonymity. In general, it is frowned upon, mainly on moral grounds (in that is only fair to identify yourself) but also on practical ones (if several different people in a discussion are posting anonymously, it quickly becomes hard to track who is saying what.) There are instances where using a false name is considered useful because it allows things to be said by someone inside an organisation who couldn't say them if she or he had to identify themselves. The case brought by The Times dismayed many who felt that as a result they lost a blog that gave a "real" view. However, it is wrong for official comments from an organisation to be made anonymously. When someone is commenting or writing on behalf of the Methodist Church, they should make their true identity clear from the start.

4.6 Don't pretend to be something or someone you're not

This reiterates the point made above – when posting or responding as part of our work, we will always identify who we are and our role with the Church. This is the only honest approach to take.

5) Confidentiality

5.1 "Information wants to be free" was a rallying cry for early users of the web, and that tradition continues today. It means free both in the sense of not being charged for, but also free in the sense of unbounded and able to move freely. Different online users will differ over whether they assume something can be shared unless it is marked confidential. However, it only takes on person to assume something can be shared for it to be spread, and others will then follow that lead.

5.2 Most employers, on the other hand, would assume that all information they pass to internal to staff is not intended for dissemination beyond the organisation unless marked as such.

5.3 This means that organisations need to make explicit where internal paperwork or information should not be shared online unless cleared to do so in the appropriate way. Common sense suggests that organisations should be able to presume that draft, working or purely internal papers are confidential and should not be shared beyond the initial distribution, and that individual correspondence and conversations should similarly be treated as confidential. This is to allow papers and dialogue to work towards final positions without a fear that interim positions will be widely known. However, our understanding of final papers for some governance bodies, such as the Conference and the Council, is that papers are public unless marked Confidential once sent to members of those bodies.

5.4 We should adopt a policy that draft and working papers circulated within the Connexional Team are to be treated as confidential unless explicitly marked otherwise. In this case *confidential* means kept within the Connexional Team. Those who wish such work to either be shared widely or restricted to a particular group should make that explicit.

5.5 The Connexional Team should treat all emails, letters and conversations as confidential and only to be shared with those originally included, unless explicitly noted otherwise.

5.6 All governance bodies, and other meetings across the Connexion, should treat all paperwork as confidential unless otherwise noted, except those that meet in public (such as the Conference) or where it is decided to make all papers public (such as the Council) unless marked confidential?

6) Benefits to the Methodist Church

6.1 The rise of social media has considerable potential benefits to the Church. It can allow us to: spread our messages through our own social media sites; enable a sense of connectedness across the Connexion; and encourage collaborative working amongst people in different parts of the Connexion or even the world. It also enables us to listen to and participate in online "conversations" that might provide a stronger sense of what really matters to the Church or to groups within it.

6.2 There are probably other benefits we have yet to start to realise. Districts or circuits, for example, could start to use social media as a way for certain groups or key people to stay in touch, or to hold discussions between actual meetings. These discussions could be closed (for confidential or sensitive matters) or open to all, so that others can see and contribute.

6.3 Social media are also increasingly the way that young people choose to communicate, or even expect to communicate. For all groups, when well used, social media and other electronic communications can act as levellers – all can participate more equally, regardless of their position in society or the church, their geographical location or any disabilities.

7) Risks to the Methodist Church

7.1 There are also multiple risks and the major ones include:

a. A member of staff, other employee or someone clearly linked to the Church (e.g. a minister) posts something online that is illegal, defamatory, offensive or otherwise damaging to the Church, its reputation or relationships within it or with partners

b. Confidential information is disclosed, accidentally or deliberately

c. An individual within the Church posts comments about colleagues, managers or others that are serious enough to warrant investigation or possible disciplinary action.

d. Decisions made by governance bodies are undermined or disrespected through continued argument online.

e. The speed of electronic communications, including social media, makes it easy to say something that is later regretted, but which has become permanently online for all to see.

8) Pastoral issues

8.1 Comments made online by staff or others could be signs of deeper occupational health issues. An unhappy employee might first show their frustration or sadness in an online comment, and this raises questions about how to respond. On a wider scale, this is also a matter for those with line management or supervisory responsibility across the Connexion. There are limits on how much time a supervisor or manager should spend monitoring the online postings of others. It cannot be appropriate that individuals use this medium to air such matters relating to their employment.

8.2 CPD pp777-782 sets out guidance adopted by the Conference in 2008 from the report 'With Integrity and Skill'. This sets out the Church's best practice on dealing with confidentially in pastoral care situations. It mentions social media amongst many other ways that information can be passed.

8.3 Private space versus public arena

8.4 The use of social media significantly blurs the boundary between what is public and private. Especially for the younger generation this boundary may be porous or even non-existent. Conversations or complaints about work, policy decisions or anything that previously were restricted to the dinner table or the pub are now played out online, often making them permanently available for all to see (depending on the privacy levels set by the user). There have already been cases of people being sacked for complaining about their boss on Facebook that the boss was easily able to read.

8.5 This blurring of the boundary between public and private is probably a bigger concern to older generations than younger, and is not necessarily a bad thing. But when one group struggles to understand why private information is being shared online, whilst other regards it as normal, this will repeatedly create problems. And it these are magnified by the speed and permanence of social media.

8.6 There is also a problem about people's online comments or actions before they join the Church as staff or office holders. How do we approach this online history in the recruitment or candidating process?

8.7 Respecting confidentiality is challenging in this area. Social media do not change the Church's understanding of confidentiality, but do make it necessary to reiterate. The blurring between public and private arises here as well. Someone might make a comment on Facebook about the facts of a confidential decision, which would clearly break our understanding of confidentiality. But they might instead make a comment about how they feel about the decision, which inadvertently gives away some confidential information. They might feel they have done nothing wrong, whilst others would see a breach of confidence.

C: Governance and other bodies

9) Private meetings and the Chatham House Rule

9.1 The Chatham House Rule states that "When a meeting, or part thereof, is held under the Chatham House Rule, participants are free to use the information received, but neither the identity nor the affiliation of the speaker(s), nor that of any other participant, may be revealed". It is generally assumed that bodies such as the Council meet under such a rule or a variation on it, but this is not made explicit anywhere. Additionally, it is usually understood but not usually stated anywhere that the "use of information received" only takes place once the meeting has finished, unless certain information needs to be relayed immediately to particular individuals or groups, in which case it will be the job of stated officers to do that. The same rule applies to members of the meeting, staff who attend to support it and visitors to attend for all or part for whatever reason.

9.2 Because the membership of most bodies is published, and the minutes would record the identity of those present and any visitors, the phrase about not identifying the participants is not necessary.

9.3 Therefore the Church should adopt for all meetings, except those held in public, the following variation of the Chatham House Rule: *"When a meeting, or part thereof, is held under this rule, participants are free to use the information received* *after the end of the meeting (excluding any items marked as confidential), but neither the identity nor the affiliation of the speaker(s), may be revealed"* unless a particular body or meeting explicitly chooses to adopt a different rule. This would apply to all attending the meeting in whole or part in any capacity.

10) Church meetings and Christian conferring

10.1 The core purpose of all meetings across the Church is to reach decisions for the benefit of the Church and its mission. All participants in meetings owe it to the other participants and the rest of the Church to give their full attention to the matters at hand, to be open to the arguments presented by others and to be open to God. This Christian conferring is demanding, and others have the right to expect that all participants will give maximum alertness to it. Becoming absorbed in social media is contrary to this, as would be playing a game on a computer or reading a novel, for example.

10.2 In the future, we might see social media used as part of meetings, and it is possible to devote most attention to the meeting whilst keeping an eye on Twitter. We don't for example, bar people from sending or receiving text messages during meetings. But a balance needs to be struck, and that should reflect that members of governance and other bodies are there principally to engage in the work at hand, and devoting more than a small amount of one's attention to anything else is not acceptable.

11) Confidentiality and Methodist governance bodies

11.1 A key issue is information being sent from within governance body meetings. In the Methodist Church, the governing body is the Conference, which meets in public (apart from agreed closed sessions.) All of the non-confidential reports are available online or to buy in print form beforehand. The media are invited, audio is streamed live and in recent years we have provided free wireless access and encouraged those visitors who can to blog live. We have also run the Methodist Conference Twitter feed in 2009 and issue press releases and daily reports during the Conference. We provide an aide memoire and a summary document following the close of Conference. In that context members of the Conference are free to use social media during proceedings, but there is a legitimate question about whether this is the best use of their time and energy.

11.2 The Council meets in private, but the agenda and non-confidential papers are published online in advance, a press release is issued immediately after and a report written by the Team's Media Officer appears in the Methodist Recorder soon after. The Strategy and Resources Committee (SRC) meets in private and its agenda and papers are not published in advance. The only externally available report of its activities is the minutes that are published with the Council papers. Gatherings such as the Connexional Leaders Forum are not governance bodies, but are important consultative meetings and do discuss matters of Connexional significance in private or with invited visitors.

11.3 In all instances, it is now easy for a suitably equipped member of one of these bodies, or a member of the public visiting the Conference, to use social media to report live from the meeting. They could 'blog' or 'tweet' what is going on. They could change their Facebook status to indicate delight or displeasure with decisions made. They could take and upload photos, audio or video of the meeting or people addressing it. This could bring risks for the Methodist Church.

11.4 If we adopt the above variation of the Chatham House Rule, then that limits what those attending closed meetings can say via social media during the meeting. They would still be free to blog on other topics or personal feelings, and would be free to discuss the outcomes of the meeting afterwards.

11.5 Social media do not and should not change our fundamental understanding about confidentiality across the whole life of the Church. Private conversations or emails, confidential reports to governance or others bodies, closed sessions of the Conference or the Council are confidential, both at the time and after. Only when an item is explicitly released from its confidential state by those able to do so should it be shared. This is as true in relation to social media as it is to any other media or conversations with others.

11.6 All organisations rely on the people involved respecting confidences, and the Church is no different. Professional conduct requires this, and the Church has a right to expect this from both employees and office holders.

12) How other organisations respond

12.1 A wide variety of other organisations are wrestling with the same issue as us and we have drawn from the guidance of other bodies in developing our draft guidelines. These include: The Civil Service, Shift Communications, Telstra, The BBC, Sun Microsystems, Fellowship Church.

13) Courtesy

13.1 At the heart of this issue is a simple one of courtesy. In a meeting of any kind, to persistently or deliberately give attention to something other than the speaker is discourteous to them. Between speakers or during other transitions other activity is more acceptable. And in the future social media might become part of how meetings are conducted. But for now in meetings all have an obligation to give their attention to the matter at hand and the speaker currently speaking.

14) Email

14.1 Email is not normally considered a social medium in, although in the case of email groups – where people subscribe and everyone receives copies of all messages sent to the group – they are similar in effect. However, email use and abuse are a concern for all, and so the Connexional Team guidelines on email use are attached as an appendix to this paper.

15) Glossary of useful terms

Blog or Weblog – personal website (sometimes shared with friends) on which regular articles – 'posts' - are published and comments are invited. These posts often include links to other 'blogs' or social media content. Blogs are free and take minutes to set up - e.g. at www.blogger.com

MySpace – free web space where people (mostly young) share music, photos etc. It includes a message board. www.myspace.com

Facebook – the most popular social networking website, with over 350 million users worldwide. Build networks of 'friends': share what you are up to and keep tabs on what they are doing, leave messages, arrange social events, join in groups, campaigns, etc. www.facebook.com

Twitter – Increasingly popular. Sign up for an account and you can upload short messages of 140 characters called 'tweets'. People commonly 'tweet' regularly throughout the day, often using a mobile phone. People can 'follow' (i.e. view the tweets, or 'twitter stream') of anyone they like. Can respond to tweets. E.g. Sarah Brown is followed on Twitter by over 750,000 people. See www.twitter.com

YouTube – Video sharing website. Free and easy to upload video from your computer or mobile phone. Has caused controversy over copyright infringement. Lots of video is also user-generated, often from cameras on mobile phones. www.youtube.com

Flickr – Upload your photos onto the web. These can be shared with others directly by sending them a link, or via searches for content on particular themes or topics. www.flickr.com

iPhone – A mobile phone from Apple that makes it easy to send emails, browse the internet and upload content to websites / twitter / Facebook etc. In a couple of years it's likely the great majority of phones will have these capabilities.

Trolls and flame wars - A troll is someone who picks, continues, or escalates, an argument on line simply because they like arguing. A 'flame war' is an argument that will never end because at least two of the parties involved will never agree, change their position, or reach a compromise. Both are to be avoided because they can absorb an incredible amount of time without reaching a conclusion or even producing anything interesting or constructive. Both can be dispiriting because they can devolve into bad language or personal attacks.

Appendix 1: Connexional Team guidelines for email use

This is an edited version of the document available to staff.

Legal responsibilities and obligations

Whenever composing an e-mail, you should always consider the following points:

- E-mail is considered company property and can be retrieved, examined, and used in a court of law.
- Unless you are using an encryption device (hardware or software), you should assume that e-mail over the Internet is not secure.
- Never put in an e-mail message anything that you would not put on a postcard (i.e. visible to the courier).
- Remember that e-mail can be forwarded, so unintended audiences may see what you've written.
- You might also inadvertently send something to the wrong party, so always keep the content professional to avoid embarrassment.
- E-mails are a formal record, and can be contractually binding.
- An abusive or harassing e-mail can be the subject of disciplinary procedures.

> This paper should be read in conjunction with the Methodist Council Connexional Team's other IT policy documents.

Personal e-mails

Like telephone calls and Internet browsing, use of the e-mail client (Outlook) for non-business related e-mails is permitted but:

- Personal e-mails should be limited
- Personal e-mails should not get in the way of business related work

E-mail etiquette and style

E-mails can be used for a number of different purposes and therefore a number of different styles should be understood and adopted. Whether an e-mail is used as a simple response to a short question asked by a colleague you know well, or as a lengthy document setting out procedures to a person you've never met, there are some ground rules you should adhere to.

Ancestry, Heritage & Legacy

E-mail as a form of communication is sometimes treated with a little contempt for a number of reasons: it's modern, requires knowledge of computers and can seem cold and distant in its approach to sensitive subject matters. To silence some of its critics, however, it is worth our while remembering a few key facts:

- E-mails in business have been around, largely unchanged for the last 10-15 years and Windows PCs in business have been around for at least the last 20 years.
- The first e-mail with an @ symbol was sent by Ray Tomlinson in 1971 and even the Queen sent her first one on the 26th March 1976.
- Christopher Sholes patented the Qwerty keyboard in 1874 which was then sold to Remington who started production immediately.

- Lawrence of Aquilegia completed ***ars dictaminis*** (the Art of Letter Writing) in AD 1302, detailing the salutation, the rhetoric and narrative, the petition and conclusion of a letter.
- Language (specifically English) is a continuously evolving beast, and although written language changes more slowly, this is only because, by its very nature, written language is a more considered medium – we can spend time on our choice of words, review the document as a whole and analyse the various meanings to avoid misunderstanding.

> It should be seen that e-mail has a worthy ancestry and heritage covering more than 700 years. Its continuing legacy and development is within our hands.
>
> Whilst it is still in its relative infancy, we have the opportunity and responsibility to shape it into a relevant and informative mode of communication.
>
> **There is no excuse for sloppy e-mailing!**

General concepts

Is your e-mail message really necessary?

Before thinking about etiquette or style, consider first if your message really is necessary. The more mail you send, the more mail you receive: if you send an e-mail now, you are likely to have to deal with the response in a couple of hours' time. Consider the alternatives:

- Picking up the phone
- Walking across a room or up a flight of stairs to talk to the person

> Do not use e-mail as a way of avoiding talking to people (or a specific person).

Use correct spelling and grammar

Regardless of the purpose of the e-mail, correct spelling and grammar simply make an e-mail easier to read. Use the spell checker, but be aware of look-a-likes (through/thorough), sound-a-likes (there/their/they're) and typographical errors (were/we're). Additionally, although contemporary English permits a freer use of punctuation you should still make an attempt to use commas, full stops, semi-colons, colons and brackets effectively, for the sake of clarity.

Do not write EVERYTHING IN CAPITAL LETTERS

This always comes across as shouting and will seem rude to the recipient. Use the correct case: capitals can then also be used for emphasis when you do not have access to bold or italics.

High priority / Urgent / Important

Do **not** use these options unless you really need to. Using these options too much will ensure your recipients eventually learn to ignore their special status. No more than one "important" e-mail a week would seem appropriate.

Style

It is important to consider how formal an e-mail should be. If too informal you can appear unprofessional; if too formal, you can come across as being cold and lacking in social skills. Use the following three criteria to help gauge the level of formality:

- How long you have known the recipient?

Is it a few hours, days, weeks, months or years? When there are many recipients, think of the person you have known for the shortest period of time.

- How well you know the recipient?

Is this your first contact? Have you only corresponded via e-mail or letters, or have you spoken on the phone, or indeed met the person, face-to-face?

- What is the subject matter of the e-mail?

If the e-mail is inviting people to an informal, open meeting the style can be quite chatty. If the e-mail is setting out a new disciplinary procedure, the style should be more formal.

> When replying, the best rule of thumb is: match the formality of the original message.

Structuring your message

Addressing your e-mail

There are three fields to consider:

- **TO field**: generally, you should use this field for people who are expected to take some action on the e-mail. **TO = ACTION**.
- **CC field**: this should be used for people who are included for their information. Do NOT over-use this and simply insert everybody in your team or cluster; only include those people who will find it *relevant*.
  CC = INFORMATION.

> Beware of "CC bullying": sending an e-mail to someone and then CC-ing their line manager or another senior address. This is both an implied threat to the recipient – whether intended or not – and a waste of the line manager's time.

- **BCC field**: this field will not be shown to TO or CC recipients and so they (TO & CC) will be unaware of who on the BCC list has also received the e-mail.

This is a culturally complicated and occasionally contentious element of an e-mail message, but there are usually two main reasons for using the BCC field:

- For personal reasons: when you do not wish the main recipient of an e-mail to know who else has received the e-mail. This area of e-mailing should be approached with extreme caution: why do you wish to hide the recipient details? Why not include both recipients in either the TO or CC field and explain to each person in the body of the message why the other has received the e-mail.

- For practical reasons: when you wish to hide the e-mail addresses of a mailing list from each other. You can include your name in the TO field and all your recipients in the BCC field. This can help reduce spam, can reduce the amount of space taken up in any reply messages and keeps your mailing list confidential. Your recipients, however, may find it useful to know which groups of people were the intended recipients. In this case, you could include in the body of the e-mail a line saying who received the message.

It may also be the case that the recipients don't wish to have their e-mail addresses published or publicised. In this case you can respect their privacy and include their addresses in the BCC line.

Including a Subject line

Always include a subject line, never leave this blank and be as specific as possible. Consider how a particular e-mail differs from others you may have sent on the subject. Rather than send another e-mail titled "Training", consider including date, time, subject, location and people indicators:

- Word Training, 24 March, Meeting room 5

Or

- Induction course, Michelle Collins, 2pm

An e-mail will typically keep its subject line when you reply or forward. If the e-mail body no longer reflects the subject line, you should consider typing a new subject or starting a completely new "thread".

Structuring the body of your e-mail

If you have a lot of information to impart in one e-mail (although consider splitting the information into two or more e-mails), you should structure your e-mail effectively.

- Don't be afraid to use headings to split up sections of the e-mail
- Don't be afraid to use bulleted or numbered lists

If your e-mail client doesn't support bold, italics or bullet points, and is only "plain text", try using unusual characters, such as asterisks (*), dashes (-), hashes (#) or even slashes (/////) to mark off a heading. However, don't over-format your e-mail. Only use bold, italics to represent emphasis and don't use any colour other than black (except in your signature).

- As in letter-writing, organise what you wish to say into paragraphs. Always ensure there is a blank line between each paragraph, whether your e-mail client (Outlook) puts it in for you, or you have to press return twice.

Generally speaking a long e-mail might take the following structure:

- Greeting (see below)
- Imparting information or replying to questions from a previous e-mail, organised into paragraphs. Include a reference to any attachments.
- Requests or next steps ("**I'm** going to draft a new policy document, can **you** complete the attached document and return")

- Sign-off (see below)
- Signature (see below)

Greetings

This should be related to the e-mail's level of formality and you should use your best judgement, taking into account the points mentioned above and the following options:

Level of formality	Single recipient	Many recipients
Formal	Dear Mr Smith	*Blank*
Neutral	Dear John	Dear All
Very informal	Hi John	Hi All

If Mr John Smith signs off his next reply with "John", it may be appropriate to reply to this e-mail with "Dear John". Only use "Hi" for very informal internal e-mails. Use "Dear" for external e-mails.

You can use "Dear Sir / Madam" or "To whom it may concern" for recipients whose names you do not know (e.g. accounts@)

Title House Style

When addressing e-mails you should use the correct title abbreviation and house style. Most notably:

- Use **The Revd John Smith**, not Revd John Smith or Rev Smith, when referring to individuals and **Revd John Smith** when addressing. You should begin with **Dear Mr Smith** or **Dear John**, but never Dear Revd or Rev Smith. Never use The Revd without initials or Christian name.
- Mr, Mrs, Ms, Dr and The Revd do not take full stops and there is no full stop after name initials, e.g. **Mr B Jones**.

Sign-off

This should match your greeting style.

Level of formality	Single recipient
Formal	Yours sincerely / faithfully
Neutral	Best regards
Very informal	All the best / best wishes etc.

Almost every e-mail client (Outlook) has the ability to include an automatic signature either for New e-mails or for Replies and Forwards (see below). These should be used as they save time, whilst maintaining professionalism.

Signature

Your signature contains your name, job title and any other information the sender would find useful. The Methodist Council Connexional Team uses a specific template for signatures. Please see the **Further information** section for an example of this. Do not set your (long) signature to appear at the end of each reply as this makes scrolling through multiple replies tiresome.

Adding attachments

Limit the number of attachments you add to an e-mail. Receiving dozens of attachments can be frustrating:

- They clog up the recipient's mailbox
- It becomes harder to know which attachment the sender is referring to
- It duplicates a single document's existence (making version control harder)

Instead:

- Keep the list of attachments short
- Consider inserting the text of an attachment into the e-mail
- Refer to "shared resources" where possible (perhaps a link to a website/Intranet/server folder)

> **Note:** E-mail messages you send and receive are limited to a maximum of 10Mb in size. Anything larger than that will fail to be delivered and the sender of the message will be notified of the failure. Messages sent that are between 5Mb and 10Mb in size are queued for delivery in the evening when the e-mail server is less busy.

Finally, be aware that:

- When you **reply** to a message the attachment **will not** re-attach (since it is assumed the sender will already have the file).
- When you **forward** a message to a third party the attachment **will** remain, so consider if the third party needs the attachment too.

Etiquette

Response time in replying and forwarding

You should respond to an e-mail as soon as you can. Depending on the volume of e-mails you get a day, this may not always be possible; however you should always consider the requirements of the sender:

- Would it be easier to pick up the phone and deal with the situation there and then? After all, replying to an e-mail will almost guarantee that you receive another e-mail from the same person two hours later.
- Can you send a quick response, saying "Thank you, I'll have some time later to look through this in more detail."? See **Suggestions and best practice** for help on this.
- Is it an e-mail that requires you to do something? Or can it simply be filed? See **Suggestions and best practice** for help on this.
- Be careful when you "Reply to all" – consider whether all the recipients need to see your response, or just the original sender.

Mirror the incoming e-mail

If someone has sent an e-mail with three paragraphs each addressing a different point, organise your answers in the same order.

Providing negative feedback

You must be extremely careful about providing negative feedback in an e-mail – however carefully a message is written, it will most likely be taken in a harmful and upsetting light by the recipient. It is far less ambiguous to provide negative feedback or criticism either face-to-face or on the phone.
If you do choose to use e-mail, consider again your relationship with the individual (see above) and never send the e-mail on a "reply-to-all" basis (see below).

Reply to all

Be careful about your use of this tool. If 100 people each "reply all" to a single e-mail, then each person will receive 100 e-mails and 10,000 would be generated. If you as a sender wish to limit the recipients' ability to reply to all, you can include them all in the BCC field. If you as a receiver feel the need to reply to all, consider carefully how much each recipient needs to see your response.

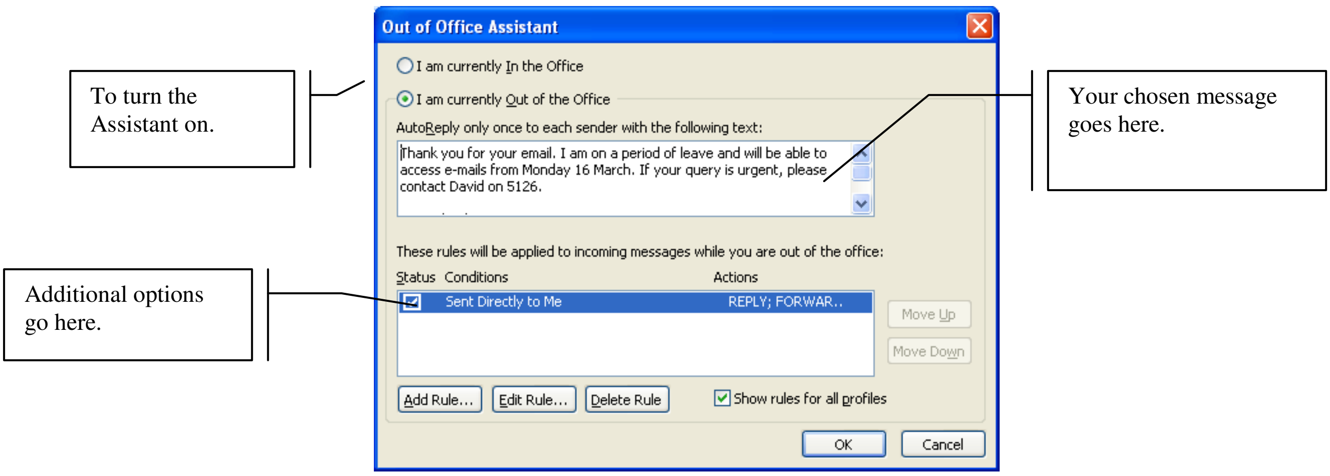
> If the list of recipients is over ten people, reply to all will probably not be an efficient way of holding a conversation – instead the person in charge of a project should ask for individual responses and collate these in a final e-mail.

Out of Office Assistant

This is an automatic reply that can be activated when you know you will be unable to respond to e-mails for a period of time (e.g. a period of leave). It will send a reply once to each sender with a message you choose and the original message will remain in your Inbox. You could also ask it to:

- Forward the message onto another e-mail account (e.g. @hotmail.com)
- Move the e-mail to another folder
- Reply with a longer message

To turn it on, in Outlook, click **Tools → Out of Office Assistant**.



The recommended text is included in the **Further information** section, below.

Re-read the e-mail before you send it

Your initial opinions and reaction to incoming messages may change even in a few minutes. Particularly for sensitive messages:

- Take time in composing the e-mail
- Save it in the **Drafts** folder
- Re-read the message from the point of view of the recipient

It is possible for messages to be delayed in the Outbox for a period of a few minutes. See below for more details.

Suggestions and best practice

General suggestions

Do you need to communicate via e-mail?
As a general rule, if you have sent three e-mails on the same subject in the same day and there is still more to be discussed, consider picking up the phone to speak to the person, or visiting them at their desk. A final e-mail could still be sent to summarise what was said.

Further information

Signature example

The Connexional Team uses the following format for signatures (the block of text which appears under your sign-off). Replace the text in angle brackets <…> with your real data. The text in square brackets […] is to be left.

<Name> | <Job Title>
The <Cluster name> Cluster | The Connexional Team
<number> [direct line] | <number> [mobile]

The Methodist Church
Methodist Church House, 25 Marylebone Road, London NW1 5JR | 020 7486 5502 [Helpdesk]
www.methodist.org.uk Registered charity no. 1132208

Please note that the signature font is Verdana 8pt, and is all in the blue colour, apart from the words The Methodist Church which are in red. You can copy and paste the template above into Outlook and it will copy across the correct size and colours, although on some machines you will need to correct the font to Verdana.

Staff based in Manchester, Peterborough or at home should adapt this template appropriately.

Out of Office Assistant example

Your text should still be formal, not chatty. Do not include your holiday plans and give real dates, not time spans (e.g. "On leave until 16 March" not "In France for the next week"). You should include:

- An apology for not being able to respond immediately and details of when you'll be able to respond to the e-mail.

- An alternative means of contacting you, if appropriate (e.g. a work mobile). Only give alternative means of contacting if you are happy you are happy to be contacted (i.e. not when you're on holiday).
- An alternative person within the Team who can help OR the help desk details. Enquirers must be given a way to seek further information.

You should make sure the alternative contacts are aware that you have given their details for this purpose.

As an example:

> Thank you for your e-mail. I am sorry, but I will not be able to respond immediately, as I am on a period of leave and will not be able to access e-mails until Monday 16 March.
>
> For training related queries, please contact John Smith (smithj@methodistchurch.org). For general queries please contact the helpdesk (enquiries@methodistchurch.org).
>
> Many thanks
>
> Chris Morris
> IT Applications Trainer