

	POLICY PROCEDURE GUIDELINES	POLICY NUMBER: 05.30.00.	PAGE NUMBER: 1 of 8
		SUBJECT: Email Usage & Email Blasts Policy <i>(Including the Internal & External Communications Guidelines)</i>	Adopted: 12/8/2015 Latest Revision: Next Review:

05.30.00. POLICY STATEMENT

Electronic email is pervasively used in almost all industry verticals and is often the primary communication and awareness method within an organization. At the same time, misuse of email can pose legal, privacy and security risks, thus it's important for Forest Preserve District of Cook County (the "District") employees to understand the appropriate use of electronic communications.

05.30.01. PURPOSE

The purpose of this policy is to ensure the proper usage of District emails, and make employees aware of what the District deems as acceptable and unacceptable use of its email system. This Policy does not cover every possible situation. Rather, this policy establishes general principles that employees should apply when using emails.

05.30.02. REFERENCES

Illinois' Local Records Act (50 ILCS 205/)

Cook County Personnel Rules
 Rules of Conduct: Pages 20-23

Forest Preserve District of Cook County, Employee Handbook
 Use of District Property Section: Page 17

Forest Preserve District of Cook County
 Electronic Communications and Technology Use Policy (03.20.00.)

Harvard Business Review:
<https://hbr.org/2013/09/to-reduce-e-mail-start-at-the-top>

05.30.03. DEFINITIONS

N/A

05.30.04. SCOPE

This Policy applies to all District employees. This policy only applies to emails sent to and from District email accounts. The District reserves the right to change or modify this policy or any related policies or standards at any time, for any reason, at the absolute discretion of the District. Any violations of this policy may subject an individual to disciplinary action.

05.30.05. **RESPONSIBILITY**

The Information Technology Department: The Information Technology Dept. shall be responsible for ensuring employee compliance with this policy.

Department Heads: Department Heads shall: (1) review, and if necessary and appropriate, approve employee blast emails; and, (2) comply with this policy.

Supervisors: Supervisors shall be responsible for periodically reminding employees about this policy, or when and where appropriate.

05.30.06. **PROCEDURE**

05.30.06.01. **Email Usage Policy:**

A. Authorized Use: Generally, acceptable email activities are those that conform to the purpose, goals, and mission of the District, and to each employees job duties and/or responsibilities. Communication and information exchange directly related to the mission, operations, initiatives, interests, and/or goals of the District is authorized use.

B. Unauthorized Use: Unauthorized use can be defined generally as email activities that don't conform to the purpose, goals, and mission of the Forest Preserve and to the employee's job duties and/or responsibilities. Any email usage in which acceptable use is questionable should be avoided.

C. Employee Rules: District employees should comply with the following rules:

1. Emails must comply with the Cook County Rules of Conduct, including refraining from containing vulgar language, vulgar/inappropriate pictures, threats, disparaging language, or sexual comments;
2. Employees are not allowed to harass or spam an individual;
3. Employees are prohibited from using email to transmit any communication that are discriminatory or harassing to any individual (including emails with offensive comments about race, gender, gender identity, disabilities, age, sexual orientation, pornography, religious beliefs and practice, political beliefs, national origin, etc.);
4. Employees shall use the standard signature guidelines established by the Communications Department and refrain from including non-professional profile pictures, non-standard and non-white background stationary, or any other graphics, outside of approved District branding, in their emails. (For example: quotes or unapproved images at the end of signature lines)

D. Strategic Use of Emails: The District has established the following guidelines to improve productivity and encourage time each week for focused, uninterrupted thought, (Not subject to discipline):

1. District employees should limit the number of people copied on emails.

2. District employees should minimize the use of reply to all.
 3. District employees should not forward emails unless strictly necessary.
 4. District employees should cut off email chains. (Example: After two exchanges, reply with “I’ll give you a call,” then pick up the phone and resolve the issue via actual human conversation.)
 5. District employees should limit email use on weekends. Unless it is an emergency, staff should not feel compelled to respond to internal weekend emails (* this does not apply to employees whose normal work schedule is on the weekend).
 6. District employees should keep calendars up to date and utilize Outlook to check schedules and set up meetings (rather than send streams of email to do this).
 7. Low Email Fridays: District employees should minimize internal emails on Friday mornings (as described in the report from the Harvard Business Review).
- E. Safety, Harassment, or Illegality Reporting Procedure:** Employees should forward any correspondence containing threatening content, harassment, and/or advocating illegal activities, to the Law Enforcement Dept., the Human Resources Dept., and/or the Director of Compliance.
- F. Email Privacy:** District employees should have no expectation of privacy while using District equipment or communication devices. The District reserves the right, at its discretion, to review any electronic files and messages to the extent necessary to ensure electronic media and services are being used in compliance with the law and this policy.
- G. Email Tips:** For additional email tips please refer to the *“Internal & External Communications Guidelines”* in Appendix A.

05.30.06.02. Email Blasts Policy:

- A. Overview:** The District recognizes that email is an efficient and cost-effective means for agencies and departments to reach internal audiences. Use of email also supports the Cook County President’s goal to reduce paper messaging. Therefore, the District promotes the responsible use of delivering information to District employees through mass email messages.

This policy supports a simple tenet: Department Heads/Senior Staff, and/or other direct reports to the General Superintendent and/or Deputy Superintendent, must approve all mass Districtwide email communications originating from requests from any of their subordinates. District employees must submit requests to send mass emails in accordance with this policy, unless otherwise directed to do so by their Department Head.

- B. Scope:** This policy applies to mass email messages or email blasts distributed to all Districtwide employees. This policy does not pertain to targeted emails for a specific department, team, group, etc.

C. Policy: The content of a mass email should be related to: **(1)** District business; **(2)** the District’s mission, initiatives, events, or programs; **(3)** an emergency/safety related matter; and/or **(4)** some other nature/environmental purpose, unless otherwise directed or approved by the Offices of the President or the General Superintendent. Generally, mass emails are used for informational purposes and not for commercial, marketing, fundraising, or personal use. Employees are prohibited from taking bulk District email addresses for personal use. Exceptions may be allowed at the direction/approval of the President, and/or the General Superintendent, and/or his/her designee.

D. Procedure:

Step 1: Requester creates a draft email, including:

1. Provide the exact wording for the body and subject line of the email message.
2. Include desired send date and time. However, this does not guarantee that the email will be sent at the requested time.

Additional Details:

- The email body should be html (comprised of text and images) or text only with links to further information.
- All email blast images should be optimized for web viewing. (i.e. keep image file sizes small to reduce load times and bandwidth consumption).
- All email blasts must contain approved District branding.

Step 2: Requester forwards their draft email, with all the materials created in Step 1, to their respective Department Head/Senior Staff member for review and approval.

Step 3: After receiving approval requester may send the blast email.

05.30.07. TRAINING REQUIREMENTS

1. All employees should be trained on this policy.

05.30.08. ACTION PLAN TO COMMUNICATE/DISSEMINATE

1. This policy should be distributed to District employees.
2. This policy should be added to the District shared drive, intranet, and website.
3. Department Heads should work to ensure that their staff are knowledgeable about this policy.



APPENDIX A:

Internal & External Communications Guidelines

PURPOSE: The Forest Preserves values developing and maintaining an effective, consistent, positive relationship with our stakeholders, users, and employees. The purpose of these guidelines is to help Forest Preserve employees following strategic internal and external communication best practices.

GUIDELINES FOR INTERNAL & EXTERNAL COMMUNICATIONS:

A. Effective Communication Tips:

1. Use standard terminology when communicating information.
2. Request and provide clarification when needed.
3. Ensure statements are direct and unambiguous.
4. Inform the appropriate individuals when the mission or plans change.
5. Communicate all information needed by those individuals or teams external to the team.
6. Use nonverbal communication appropriately.
7. Use proper order when communicating information.

B. Response Timeframe: (Emails & Telephone Calls)

1. Internal: Forest Preserves employees should strive to respond to, or at least acknowledge receipt of, fellow Forest Preserves employee correspondence, if necessary and/or appropriate, within twenty-four hours (24), but no longer than five (5) business days.
2. External: The Forest Preserves recognizes a best practice of trying to respond to external constituent correspondence within two business days (48 hours).
3. Out of Office: Please refer to D-9.

C. Principles of Good Writing:

1. Know your objective & audience. (*What specifically do you want the reader to know/think/do?*)
2. Make a list. (*Write down the ideas/points you want to cover.*)
3. Organize your ideas. (*Importance, Chronology, Problem/Solution, Question/Answer*)
4. Separate main ideas. (A new thought requires a new paragraph.)
5. Use bullets or numbers when appropriate.
6. Write for brevity and use short sentences. (*According to the American Press Institute, sentences with 15 or fewer words are understood 90% of the time & sentences with eight or fewer words are understood 100% of the time.*)
7. Use only abbreviations that are easily understood.
8. Edit your work. (*Proof it yourself and have at least one other person edit it as well.*)

D. Email Tips:

1. Communication via email will be conducted in a professional and courteous manner.
2. The email will be clear, informative and timely.
3. Your email should be checked frequently.
4. Read email carefully and respond in a timely manner.
5. Delete unsolicited advertisements without response.

6. Remember to include your signature (*name, title, department, Forest Preserves of Cook County, phone, and email*) to all external emails.
7. Provide clear detail in the subject line.
8. If the email message sent directly to you requires a response from someone else, acknowledge that you have received the email message and note that you are going to forward it to the appropriate person to handle the request. Include the person's name and email address in your email response. Always include a closing sentence in your email message, giving them options to contact you if they need additional assistance.
9. Out of Office: If you plan to be away from your office, (i.e. out longer than normal, on benefit time-off, or some other administrative leave) your email should reflect that schedule in an “Out of Office” notification.

Example: Out of office reply: Thank you for your email. I am out of the office from [DAY, DATE] to [DAY, DATE] and unable to respond at this time. I will review your message following my return on [DAY, DATE]. If you need immediate assistance, contact [NAME, PH#, EMAIL ADDRESS].

10. Outlook Calendar Invitation: Employees should strive to reply to all outlook meeting invitation requests (Accept, Decline, Tentative) within twenty-four hours (24).

E. Telephone Tips:

1. General Considerations: All telephone calls shall be answered promptly and in a professional and courteous manner. Answering the telephone is every employee’s responsibility throughout the Forest Preserves. When answering the phone, use a friendly, professional manner. Our greeting is the first impression we give our guests. Speak with a warm, welcoming tone. Identify yourself and your office and/or Department. Imagine you are the caller, and answer the phone in the way that you would want to be treated as a customer.
2. Difficult Callers: Sometimes callers are unintentionally, or for a multitude of reasons intentionally less than courteous in their request or communication. They may interrupt and be rude. Forest Preserves employees should remain calm, friendly, empathetic and cooperative. Be an active listener. Keep an open mind and make sure you understand what the caller needs or is requesting. Clarify if necessary. Do not hesitate to ask the caller questions to understand the goal or intent of the caller. Take notes if necessary.
3. Phone Transfers: Transfer calls as appropriate, but do not transfer a person unnecessarily. Explain to the caller briefly if you are unable to assist him or her and let the caller know you would like to transfer them. Have the caller's approval before transferring the caller to the appropriate person. Whenever possible, give the name of the person you are transferring the caller to as well as the person’s telephone number. If you need to search for the proper person, get the caller’s contact information so you can get back to them. Always be sure to follow through on a commitment. If you make a promise to follow up or to find someone else to assist with a guest request, ensure the loop is closed.
4. On-Hold: Phone calls should never be answered with an immediate request for the caller to be placed on hold. Always ask the caller first if he or she minds holding and wait for his or her reply. When getting back with the caller on hold, always thank the caller for his or her patience. If you need to

research information for the caller's inquiry, give him/her the option to either hold or explain you will get back with the caller when you have the information. If the caller chooses to remain on hold, two minutes on hold is the maximum amount of time that should occur without returning to the caller for updates. If the caller prefers that you call him or her back, indicate the timeframe in which the caller may expect your call. Always thank the caller for waiting.

5. Calls Directed to Employee Voicemail: Callers should not be transferred directly to a voice mailbox without first requesting the caller's approval. Give the caller the correct telephone number and the name of the person on the other line. Briefly explain to the caller why this other person is more suitable to answer this question or request.
6. Voice Mails: Voice mail greetings must be professional, current and updated when appropriate. Greetings should indicate: name, position, the Forest Preserves of Cook County, and a provision for contacting someone in person. Voice mail shall be checked frequently during business hours, and calls shall be returned promptly.

F. In-Person Customer Service Tips:

1. Communication in person will be executed in a professional and courteous manner to both internal and external customers.

G. Effective Meeting Tips:

1. Don't Meet: Avoid a meeting if the same information could be covered in a memo, e-mail, brief report, and/or on the intranet or shared drive.
2. Set Meeting Objectives: Set out what you hope to achieve before the meeting. The more concrete your meeting objectives, the more focused your agenda will be.
3. Provide an Agenda Beforehand: Provide all participants with an agenda before the meeting starts. The agenda should include: a list of the topics to be covered; a list stating who will address each topic; the time, date and location of the meeting; and, any background information participants will need to know to hold an informed discussion on the meeting topic. (*What's the most important thing you should do with your agenda? Follow it closely!*)
4. Frequently Held Meetings: For frequently held meetings such as a weekly status meeting on a project, you can save time by creating a meeting template. Once you have that in place, preparing an agenda becomes a matter of filling in the blanks.
5. Manage The Meeting By The Clock: Watching the clock is important in an effective meeting. When nobody takes charge of managing time, it is easy to become careless and unfocused.
6. Meeting Organizers: Starting the meeting on time and ending on time (or a few minutes early!) will quickly enhance your reputation as an organized person. If you are running a large or complex meeting, consider asking a colleague to serve as time keeper.
7. Meeting Attendees: Start by arriving early at the meeting (5 minutes for in person meetings and 1-2 minutes before for conference calls). That means avoiding back to back commitments on your calendar whenever possible.

8. Assign Action Items: Don't finish any discussion in the meeting without deciding how to act on it. Listen for key comments that flag potential action items and don't let them pass by without addressing them during the meeting. Assigning tasks and projects as they arise during the meeting means that your follow-through will be complete.
9. Examine Your Meeting Process: Assign the last few minutes of meetings as time to review the following questions: What worked well in this meeting? What can we do to improve our next meeting? Remember – don't leave the meeting without assessing what took place and making a plan to improve the next meeting!
10. Follow-Up On The Meeting: Following up in a timely basis is a great way to manage stress and make a good impression on others. For the best results, follow up (e.g. making a phone call, writing an email, etc.) the same day as the meeting. For very important matters, make a note on your calendar or task management tool of choice to continue following up until you reach a resolution.

FOR MORE INFORMATION: For more information please contact your supervisor and/or Department Head.

If you have questions, comments, or suggestions concerning District policies, please contact:

Forest Preserve District of Cook County
Office of the General Superintendent
Attn: Anthony D. Tindall, Policy Director
69 W. Washington St., Suite 2040, Chicago, IL 60602
Office: (312) 603-8351; Email: Anthony.Tindall@cookcountyil.gov