



# Seven Hills

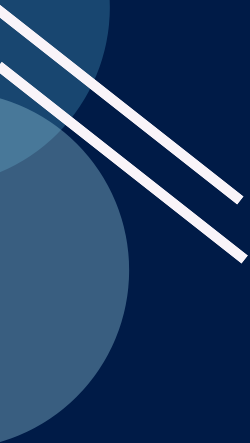
Foundation & Affiliates

## Facilitating Effective Electronic Communication

Mark Calnan, Duncan Driscoll, and Caleb Holmberg



# WPI



**"COMPANIES THAT CHANGE MAY SURVIVE, BUT  
COMPANIES THAT TRANSFORM THRIVE.  
CHANGE BRINGS INCREMENTAL OR SMALL-  
SCALE ADAPTATIONS, WHILE  
TRANSFORMATION BRINGS GREAT  
IMPROVEMENTS THAT RIPPLE THROUGH THE  
FUTURE OF AN ORGANIZATION"**

- Nick Candito





# Abstract

Our team worked with the Seven Hills Foundation, a human health service organization, to develop strategies and recommendations to overcome the barriers of establishing effective organizational communication. Based on information obtained from Human Resource departments from organizations similar to Seven Hills and the Society of Human Resource Management, we developed a revised electronic communication policy, along with a plan to implement it. Additionally, we recommended Seven Hills update the employee job descriptions, orientation and trainings, and evaluation forms to address employee expectations with regard to electronic communication. Finally, we recommended Seven Hills provide employees with an adequate amount of resources to ensure the revised expectations around electronic communication are realistic. We hope this project contributes to the establishment of effective communication within the Seven Hills Foundation.

## Team Members

Mark Calnan, Caleb Holmberg,  
and Duncan Driscoll

## Advisors

Laura Roberts and  
Robert Krueger

## Sponsor

Steven Kessler and  
Jean Des Roches

# Introduction

## Foundation-Wide Constant Contact Open Rate

**9.71%**

Effective communication serves two essential roles within an organization. First, it allows valuable information to flow among employees to enable them to accomplish goals or tasks. Secondly, effective communication builds relationships of trust and commitment among employees and clients (Optum, 2015).

The Seven Hills Foundation is currently in the process of determining how to reduce electronic communication barriers within their organization. After analyzing constant contact data over the past two and a half years, our team found that mass emails sent out to employees had a weighted average open rate of 9.71%.

The goal of our project was to provide strategies and recommendations to overcome the barriers of establishing effective electronic communication within Seven Hills Foundation. By fostering the establishment of effective communication, we will enable employees to further promote and encourage the empowerment of people with significant challenges so that each may pursue their highest possible degree of personal well-being and independence.



# Implementation of a New Policy

To address the issues with electronic communication within Seven Hills, our team analyzed Seven Hills' current electronic communication policy. Following the best practices defined by the Society for Human Resource Management (SHRM), our team recommends the SHF implement the new policy in the steps outlined below.

## SHRM steps for implementing a new policy:

- ☒ Identify the need for a policy
- ☒ Determine policy content
- ☐ Obtain support from supervisors
- ☐ Communicate with employees
- ☐ Update and revise the policy





# See.

See the Possibilities

# Believe.

Believe in Your Abilities

# Achieve.

Achieve Your Dreams

## Recommendations

Our team recommends the Seven Hills Foundation implement a new electronic communication policy. We have concluded the organization would benefit from revisions to the following:

- 1.) Organization policies and procedures
- 2.) Employee job descriptions
- 3.) Staff orientation and training
- 4.) Employee evaluation forms
- 5.) Employee resources

# 1.) Proposed Updates to Policies and Procedures

**"Policies should provide good guidelines and expectations to ensure fair and consistent practices and legal compliance." - SHRM**

## **Section 2 of Administrative Policy #110: Electronic Communications**

"It is expected that employees will have the opportunity to check email messages periodically during working hours. Employees should discuss this with their manager at program sites where opportunities to check email may be limited."

### **Proposed Revision:**

Important announcements are communicated to SHF employees via email. As a result, employees are responsible for consistently updating themselves on the information that is communicated to them electronically. The expectations of how frequently Seven Hills employees should check their email are outlined below. Any Seven Hills employee or agent who has consistently impeded the productivity of others by failing to comply with this policy may face disciplinary action, up to and including termination of employment.

#### **Hourly employees:**

should check their email at least once a shift.

#### **Salaried employees with a Seven Hills company phone:**

should check their email regularly during working and non-working hours.

#### **Salaried employees without a Seven Hills company phone:**

should check their email regularly during working hours.

## 2.) Updates to Employee Job Descriptions

Neither the essential functions, nor the additional responsibilities outlined in employee job descriptions elaborate on the necessity of email use in the workplace.

### **Example 1: Direct Family Support Professional Essential Function**

"To communicate effectively with families, individuals and Seven Hills Family Service staff regarding scheduling and utilization of allocated resources to maximize efficiency."

### **Example 2: Direct Support Staff Essential Function**

"Communicates effectively in verbal and written format. Communication is to be given and received and is every employee's responsibility."

On the left are examples of current job descriptions at SHF that do not emphasize effective email use.

### **Revision to Employee Job Descriptions:**

"Employees are responsible for consistently checking their Seven Hills email to stay up to date with important trainings, health insurance information, and organizational announcements."



# 3.) Update Employee Training

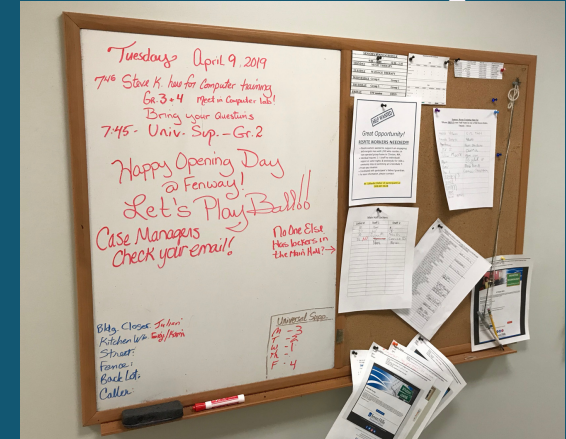
We recommend the creation of a new E-Academy training to help improve the electronic communication skills of employees.

## E-Academy Training:

We recommend the training cover functions such as flagging within webmail, along with basic email etiquette. Appendix F contains a list of information to be covered in the new training session. The training session should be completed by both new and legacy employees.

## Training Notifications

To address lack of compliance with online trainings, we recommend supervisors track employee trainings in a spreadsheet. When a supervisor is notified of overdue trainings, they will alert the employee in person and have them sign that they have received the message. From there they can communicate when an appropriate time would be to complete the training.



# 4.) Performance Evaluation

We recommend supervisors clearly state the expectations of employees with regard to written, verbal, and electronic communication during performance evaluations to help improve compliance.

## Current Standard:

### **Communication:**

Delivers clear and effective verbal and written communications in a professional manner and takes responsibility for understanding others.

## Recommended Revision:

### **Communication:**

Consistently adheres to the expectations outlined by their supervisor regarding written, verbal, and electronic communication.



## 5.) Resources

To ensure employees consistently check their email, SHF must ensure employees have the adequate resources to do so.

### Computer access:

Depending on how an organization uses technology, the appropriate ratio of staff to computers varies greatly. At programs like Adult Day Health, where the ratio of computers to staff is 1:15 it is necessary to either provide scheduled times for employees to check their email, or provide employees with the adequate number of computers. Supervisors should inform employees of the scheduled times they can check their email.

### Software Access

We recommend the SHF provide all salary employees with a Microsoft Office 365 subscription. These employees have consistent access to a computer and are expected to communicate with a variety of staff on a regular basis.

### Employee Handbook:

Currently, the employee handbook only references Administrative Policy #110 for all policies and procedures around email/internet use. We recommend the handbook be updated to include our recommended revision to the policy given previously.



# Next Steps for Seven Hills

## **Obtaining Support From Supervisors:**

Before finalizing a new policy, it is important to communicate to supervisors why it is needed and address any potential thoughts or concerns they may have. It is necessary to consider how each program location will be impacted and discuss the potential challenges the policy will create. Within the Seven Hills Foundation, Area Directors and Residence Directors are the supervisors the Senior Leadership cabinet must consult with prior to implementing the policy. The involvement of the ADs and RDs in the creation of the policy will lead to beneficial revisions and promote the enforcement of the policy in the future.

After ADs and RDs have provided their input on the proposed policy, they need to inform their employees of the policy change. Supervisors should communicate enough detail about the proposed policy change to make the organization's position clear while keeping the communications process short and simple. Our team has determined the most effective method of informing employees of the policy change would be through the mandatory staff meetings.



# **Facilitating Effective Electronic Communication**

An Interactive Qualifying Project Proposal  
Submitted to the Faculty of  
WORCESTER POLYTECHNIC INSTITUTE

In partial fulfillment of the requirements for the degree of Bachelor of Science.

By: Mark Calnan, Duncan Driscoll, Caleb Holmberg  
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Report Submitted to:

Sponsor: Seven Hills Foundation  
Jean Des Roches, Assistive Technology Program Director  
Steve Kessler, Assistive Technology Specialist  
Advisors: Robert Krueger and Laura Roberts

This report represents work of WPI undergraduate students submitted to the faculty as evidence of a degree requirement. WPI routinely publishes these reports on its web site without editorial or peer review. For more information about the projects program at WPI, see <https://www.wpi.edu/project-based-learning/global-project-program>

# Authorship

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## Methodology

Objective 1: Identify the training needs of employees and the barriers that are preventing them from effectively communicating via email.

Objective 2: Research how organizations similar to the Seven Hills Foundation have achieved effective email communication.

Objective 3: Develop an employee reference resource and provide recommendations and training for efficient communication habits.

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# Abstract

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# Acknowledgements

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We would like to thank our sponsors Steven Kessler and Jean Des Roches from the Seven Hills Foundation for providing us with invaluable information and resources for the project.

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Lastly, we would like to thank our project advisors Laura Roberts and Robert Krueger for guiding us through this process, helping us strive to create our best work, and executing our project.

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# Introduction

The ability of human beings ability to express their thoughts and ideas with one another is part of what enabled us to survive for over 200,000 years (Jason, 2002). In the beginning, humans communicated primitively through gestures and signals. As we evolved as a species, so did our forms of facilitating communication. Experts believe that human beings developed the first spoken language about 100,000 years ago (Jason, 2002). Since then, advancements in technology such as the printing press, telegraph, telephone, and internet have allowed us to expand our communication networks all over the world.

The continuous development of our communication system has proven vital to human existence. As experts study the psychology behind interpersonal communication, they continue to expand our knowledge of how to effectively communicate with one another. The concept of effective communication is something

that we struggle with at not only on an individual level and also on an organizational level.

Corporations spend millions of dollars a year on developing the most effective communication systems for their employees (SHRM & Grossman, 2018). Effective communication serves two essential roles within an organization. First, it allows valuable information to disseminate among employees to enable them to accomplish goals or tasks. Secondly, effective communication builds relationships of trust and commitment among employees and clients (Optum, 2015). Studies have shown that there is a strong positive correlation between employee productivity and satisfaction and an effective communication system within an organization (Yates, 2010).

Effective communication within the workplace is essential to an organization's ability to be productive and operate smoothly. Breakdowns within a corporation's communication system are

not only detrimental to productivity, but also create significant financial stress (SHRM & Grossman, 2018). In a report discussing the costs of poor communication, David Grossman, an Israeli communications expert, found that after surveying 400 companies of 100,000 employees or more that each company incurred an average loss of 63.4 million dollars per year due to inadequate communication to and between employees (SHRM & Grossman, 2018). Ineffective communication can result from a variety of physical and physiological barriers that develop within the workplace. These barriers can be as simple as a wall or partition, or as complex as an individual employee's behavioral attitude. Learning how to effectively manage these barriers is vital to any company's communication system.

The Seven Hills Foundation is currently in the process of determining out how to reduce communication barriers within their organization. Seven Hills is a health and human services

agency that offers a variety of comprehensive support for people with significant life challenges. The organization employs over 3,800 employees at over 160 locations. With a network of over 52,000 clients spanning seven different countries, it is imperative that Seven Hills Foundation learn how to adapt their communication system to meet the needs of not only their clients, but also their employees (Seven Hills Foundation, 2019).

The goal of our project is to provide strategies and recommendations to overcome the barriers of establishing effective communication within Seven Hills Foundation. We will accomplish this goal by (1) identify the training needs of employees and the barriers that are preventing them from effectively communicating via email, (2) researching how organizations similar to Seven Hills Foundation have achieved effective email communication, (3) develop an employee reference resource and provide recommendations and training for efficient communication habits.

Following the introduction, this report examines the barriers that inhibit effective communication and how information flows within an organization in the literature review. The report will then describe how we completed each objective within the methodology chapter. Finally, the report outlines our findings and recommendations within the findings/recommendations chapter of our report.

# Literature Review

## Section 1: Communication in the Workplace

Social theologians George Theodorson and Achilles Theodorson define communication as “the transmission of information, ideas, attitudes, or emotion from one person or group to another primarily through symbols” (McQuail, D., & Windahl, S., 2013). Communication is a tool that organizations and people use everyday to assist one another in accomplishing goals and objectives. How organizations and people utilize effective communication strategies directly impacts the manner in which the goals are accomplished. A study conducted by Towers Watson, a global advisory specializing in risk management solutions, found that companies that are effective in change management and communication are three and a half times more likely to outperform their industry peers (Towers Watson, 2013).

## 1.1: Communication Structures in the Workplace

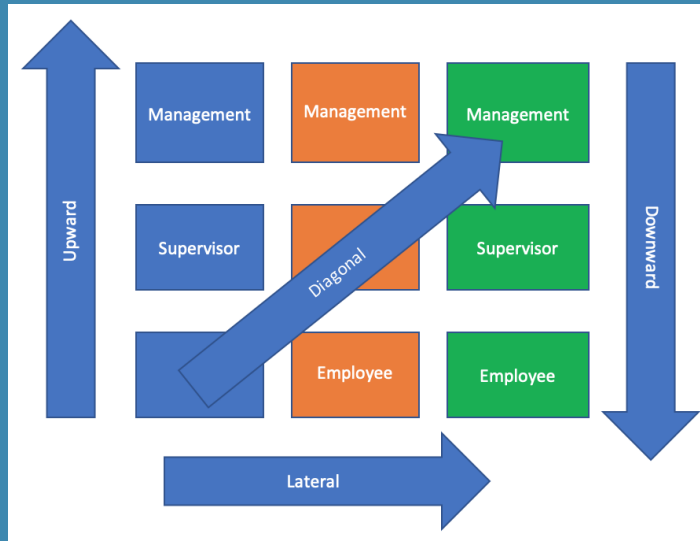
In order to determine how an organization can utilize effective communication strategies, it is imperative to define the levels and directions of communication within an organization. Communication is typically divided into three distinct levels: micro, meso, and macro. Micro communication refers to interpersonal communication within an organization. Meso communication refers to group, organizational, and inter-organizational communication. Macro communication refers to all other higher orders of communication (Baker, 2002). Interpersonal and group level communication are the base of the communication structure of all organizations. Originally, organizational literature on interpersonal communication focused on managers interpersonal communication skills. As communication technologies expanded communication channels within organizations, managers and executives began to recognize the

importance improving all organizational members interpersonal communication skills. Carl Rogers, an American psychologist, and Fritz Roethlisberger, an American social scientist, determined that active, non-evaluative listening is an essential skill that all employees must develop in order to effectively communicate with peers. Active, non-evaluative listening stresses that the ability to receive a message is as important as the skills associated with sending a message (Rogers & Roethlisberger, 2014). Whether employees are communicating via oral, written, or computer mediated channels, establishing effective interpersonal communication is essential to the overall performance of an organization.

Research in determining effective communication within the meso communication level involves defining and managing formal and informal communication within an organization. In the past, large corporations stressed the importance of formal, top-down communication. Managers and executives believed that informal

interpersonal communication could potentially disrupt the performance of an organization. Now, organizational literature recognizes the influence informal communication has on the development of company culture and climate (Baker, 2002). Effectively managing formal and informal communication within the workplace is vital to the internal operations of an organization.

Communication within an organization flows in three distinct directions vertical, horizontal, and diagonal. Vertical communication occurs between hierarchical positioned persons and can flow upwards or downwards within an organization. Horizontal or lateral communication occurs between employees who hold similar hierarchical positions. Diagonal communication involves the communication of managers and employees across different functional divisions (Baker, 2002).



**Figure 1: Directions of Communications within an Organization (Baker, 2002).**

The majority of organizational communication literature stresses the importance of vertical communication within an organization. The more prevalent form of vertical communication seen within organizations is downward communication. Dr. TJ Larkin, an American communications expert, found that effective downward communication occurs when top level managers communicate directly with intermediate

supervisors and intermediate supervisors communicate with the employees (Larkin, 1994). Larkin's model for effective downward communication emphasizes the importance of empowering the intermediate supervisor. Larkin's research provides further support of the phenomena known as the Pelz Effect. Donald Pelz, an American psychologist, established that increasing the power of supervisors increases both the satisfaction and performance amongst frontline employees (Pelz, 1952). Top level managers can empower supervisors by communicating with them directly and allowing them to provide input on decisions. Dr. Charles O'Reilly, an American organizational behavior expert, and Dr. Karlene Roberts, an American psychologist found that when a supervisor is perceived to have power, employees have greater trust in the supervisor, greater desire for communication with the supervisor, and are more likely to believe the information coming from the supervisor is accurate (Roberts & O'Reilly, 1974).



Vertical communication can also flow upwards within an organization. Upwards communication involves front line employees communicating directly with top level managers on issues and decisions within the organization. Dr. Jane Gibson, a professor of anthropology at the University of Kansas, and Richard Hodgetts, a business management professor at Florida International University, found that employee satisfaction and performance tends to be lower with upwards communication compared to downwards communication (Gibson & Hodgetts, 1991). Similarly, Larkin reported low levels of employee satisfaction with all commonly used upward communication strategies such as, employee surveys, suggestion programs, employee grievance programs, and employee participation programs (Larkin, 1994). There are several management and employee based reasons for why low levels of satisfaction are found with upwards communication strategies. Gibson and Hodgetts found that from management's perspective, upwards communication strategies

do not involve two way communication between employees and managers. Also, they often trigger defensive responses from managers. David McClelland, an American psychologist, determined that upwards communication strategies are ineffective amongst employees because they fear reprisal for speaking their mind, feel that their ideas and concerns will be modified as they are transmitted upwards, and managers tend to give the impression that they do not have time to listen to all employees concerns (McClelland, 1988).

Lateral or horizontal communication occurs between employees of the same or similar hierarchical status within an organization. Corporations often overlook the importance of lateral communication. As organizations have become more team oriented, a greater emphasis has been placed on improving lateral communication among employees. Improving lateral communication within an organization can help promote the learning and the sharing of expertise and best practices (Baker, 2002).

Diagonal communication involves the communication between managers and employees across different functional divisions. Donald Wilson, a graduate business professor at Rochester Institute of Technology, found that diagonal communication is rarely discussed within organizations because it violates most organizations chain of command (Wilson, 1992). Wilson argues that diagonal communication is necessary for effective task coordination and complex problem solving within an organization. Diagonal communication can be a more efficient communication strategy for employees who need information from a superior, but do not want to deal with the inefficiencies of going through the formal chain of command (Wilson, 1992).

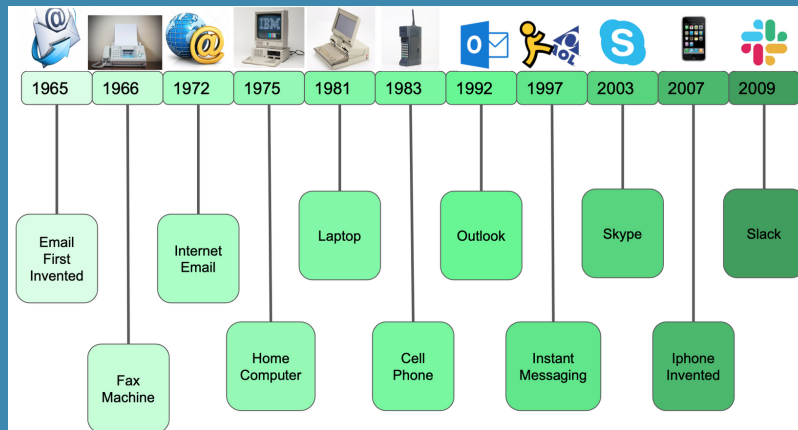
## **1.2: Evolving Workplace Communication**

The channels of communication within organizations have seen drastic changes over the past century. During the early portion of the 20th century, communication within companies and

corporations was conducted primarily through face to face communication, telephone, and fax (Rogers, 1986). As seen in figure 2, advancements in technology led to the expansion of communication channels within the workplace during the mid 20th century to the early 21st century. Today, communication within these channels is mediated through technologies such as, e-mail, video conferencing, instant messaging, and social networking platforms (Rogers, 1986).

Prior to the dependence on the Internet, organizations worked as isolated silos (BS, 2008). Internal and external communication within organizations was limited to direct human contact, telephone, and fax. The fax machine laid the groundwork for email and other web based communication channels (Coopersmith, 2019). Faxing accustomed people to easily send and receive messages in minutes, rather than hours or days. Email would eventually make faxing obsolete due to the ability to edit and format documents, low cost, and worldwide access.

Along with these benefits came the increased pressure for faster communication (Coopersmith, 2019). As competition within the computer industry increased, people began to not only have access to a computer at work, but also in their homes. As more people gained access to computers, the boundary between work and home slowly began to diminish. Computer based communication channels have established a culture of constant accessibility in and out of the workplace.



**Figure 2: Timeline of Evolution of Communication Technologies (Fang, 2005).**

## **Section 2: Achieving Effective Communication in the workplace**

Achieving effective communication in the workplace is vital in order to be a successful organization. The best computer mediated communication systems will fail if people do not work well together (Fielding, 1997). Successful communication up and down the chain of command will increase productivity and boost morale amongst coworkers. When employees are able to voice their opinions and know that their input will be taken into consideration it fosters a collaborative and inviting work atmosphere. Effective communication allows people to pass information within an organization in a timely manner (Turner, 2010). "People in an organization need to be aware of the different types of messages that flow upward, downward and sideways" (Fielding, 1997). People also need to be aware of the potential barriers to good upwards, downwards, and sideways communication.

Proper management of communication barriers is critical in achieving effective communication within an organization. In this section we will dive into the practices of effective communication, and the impacts that coincide.

### **2.1: Practices of Effective Communication**

There are many different ways to communicate in the workplace. The proper utilization of the various mediums of communication is vital in transmitting a message. "People in companies create meanings together by exchanging words and nonverbal messages. By doing this, they develop mutual expectations and begin to work as a team" (Fielding, 1997). Successful communication requires employees to understand when the different practices are most appropriate (Turner, 2010). Messages in an organization express both factual information and information about people's feelings. There are four main types of messages in an organization. There are messages that are used to maintain good relationships, contain information about

tasks, instruct people to do things, or inform employees about the goals, philosophies, and ethics of a company. These messages can be constructed over many different electronic or face to face platforms. It is important that employees are conscious of the medium they choose to transmit a message before they send it.

The most used forms of electronic communication in the workplace are email, text messages, and phone calls. All of these forms of communication are great tools, but in order for communication to be effective, employees must understand when each form is appropriate. Face to face communication is best for complicated situations requiring additional discussions, or if the information is highly confidential, or could be easily emotionally misconstrued. Emails are the appropriate form of communication when someone is hard to reach via telephone, lives in a different time zone, or if the information is not time sensitive. Also, emails are appropriate when sharing electronic information such as spreadsheets, documents, papers etc..

Emails allow you to distribute information to a large number of people very quickly, and provide a written record of communication (University of North Carolina at Chapel Hill).

To implement the most effective communication strategy possible, it is important to understand proper times to check your email. Studies have shown that checking your email too frequently throughout the day decreases productivity. Jacqueline Whitmore, an expert in business etiquette argues, "when you check your email too often, you become reactive, not proactive, and the more emails you send out, the more you'll receive." The best way to stay on top of your email without overchecking and becoming unproductive is to designate certain times of the day for checking and responding to emails. Pick times that best work for you, but checking around 5 times per day is recommended. Sending out emails during non-working hours should be avoided. Employees should allow one another the time to de-stress and focus on other parts of their lives.

When an employee knows they will not be checking email for an extended period of time it is common courtesy to send a holding email. For example, "Thank you, I got your email. I will get back to you when I have looked into this further." A holding message allows you to continue your work without being interrupted, while maintaining good relationships with colleagues (Morad, 2018).

## **2.2: Impacts of Effective Communication**

Effective communication will improve productivity, work ethic, and overall morale within an organization. Communication within an organization is used to transmit information to employees in order to improve overall productivity. Effective communication in the workplace allows employees to get to the point faster when interacting with one another because they will be on the same page with what is going on around them. The flow of information upward, downward, and horizontally throughout the organization will be fast and reliable, allowing employees to interact more efficiently.

When communication is efficient, tasks are able to be divided into units of time (Sharma, 1999).

Effective communication facilitates the growth of a company or organization by establishing a positive work environment that fosters collaboration. The more an organization practices effective communication, the greater amount of trust employees gain with one another and the clients they assist. Clear communication prevents common workplace problems from arising. When an employee sends a message to a coworker, it is important that the receiver understands exactly what the sender intended by the message. The receiver should confirm the intent of the message or ask any clarifying questions to ensure that the message is not misinterpreted (Ajala, 2012).

### **Section 3: Communication within the Seven Hills Foundation**

Communication is a vital aspect within any organization that directly impacts company culture and performance. In today's workplace, the effective use of computer mediated

communication channels have become equally important to the use of traditional face-to-face communication channels (Cardon & Marshall, 2015). In this section, we introduce the Seven Hills Foundation and the organization's mission. Then we examine the current communication system and structure within the Foundation. Finally, we identify and discuss the barriers within the Seven Hills Foundation communication system.

#### **3.1: The Seven Hills Foundation**

The Seven Hills Foundation is a non-profit health and human services organization. The Foundation provides a network of services that assist individuals with developmental disabilities. Established in 1951, these services include adult day health, day habilitation, shared living, family support services, respite care for children and adults, sports, recreation and leisure activities, and career development programs. Dr. David Jordan, the President of the Seven Hills Foundation, claims the mission of the organization is to "promote and encourage the

empowerment of people with significant challenges so that each may pursue their highest possible degree of personal well-being and independence" (Jordan, 2018). The Foundation is built on the idea that every individual, regardless of their circumstances should have the opportunity to live the highest quality of life possible. The success of the Foundation stems from the dedicated work of more than 3,800 employees in over 160 locations in Massachusetts, Rhode Island, and seven countries abroad (Seven Hills Foundation, 2018).

### **3.2: Communication Structure within Seven Hills Foundation**

The Seven Hills Foundation is the parent non-profit organization that is composed of twelve individually operating affiliates. The Foundation provides the functions of business, human resources, facilities maintenance, information technology, construction, marketing, communications, fundraising, and the Office of the President. Each affiliate organization is a

separate non-profit that is led by a vice president. The twelve affiliates include Children's Aid & Family Services, Children's Friend, Seven Hills ASPIRE, Seven Hills Behavioral Health, Seven Hills Community Services, Seven Hills Family Services, Seven Hills Global Outreach, Seven Hills NeuroCare, Seven Hills Pediatric Center, Seven Hills Rhode Island, Stetson School, and VSA Massachusetts (Seven Hills Foundation, 2018).

We are working with the Seven Hills Family Services affiliate of the Seven Hills Foundation. The Seven Hills Family Services affiliate works with individuals with disabilities and their families to live more fulfilling lives by becoming members of their respective communities through individualized supports and services. Programs within the Seven Hills Family Services include Transition to Adult Supports, Shared Living, Self Advocacy, Respite Supports, Agency with Choice, Family Support Centers, Community Connections, Adult Family Care, and Massachusetts Care Coordination Network (MCCN). These programs support individuals by providing them with a



place to live, employment opportunities, chances for community involvement, and many other services to ensure they are living a fulfilled life.

The sponsors representing the Family Service affiliate for this project are Jean Des Roches, the Director of Assistive Technology, and Steven Kessler, the Assistive Technology Specialist. After an initial interview with our sponsors, we determined that the Family Services affiliate follows a top-down communication structure. Managers and intermediate supervisors facilitate a majority of the communication within the organization. The structure of the organization can be broken down into four distinct employee positions, Direct Service Provider (DSP), Residence Director (RD), Area Director (AD), and Senior Leadership Cabinet.

At the base of the hierarchical structure of the organization are Direct Service Providers. The DSPs are apart of a client's staff team that works within a community home. On a daily basis, the DSPs are responsible for ensuring that an individual's needs are met. They provide a variety

of services that include cleaning, cooking, dressing, and monitoring the overall well being of each individual. Additionally, DSPs transport the clients to and from events or day programs that they may attend. The DSPs report to a Residence Director, who supervises between ten to twenty DSPs (Seven Hills Foundation, n.d.). The frequency of communication between DSPs and RD varies from one community home to the next. Direct Service Providers typically communicate with peers and RDs via texting, phone calls, or face to face interactions. Twice a month, all DSPs under a given RD, along with the Area Director of a given home attend a staff meeting (H. Kapardth & P. Kroma, Personal Interview, March 23, 2019).

Above the DSPs on the hierarchical structure of the organization are the Residence Directors. The role of the RD is to provide effective residential supports and lead the staff team in maintaining a clean, orderly, and safe atmosphere. A Residence Director works with ten to twenty DSPs and a group of medical personnel that compose an individual's support staff.

Resident Directors coordinate the involvement of the client with the planning and decisions that will impact their life. They ensure that each individual has the opportunity to continuously develop their Individual Service Plan (ISP). An ISP is a set of goals an individual would like to achieve by the end of the year. These goals vary based on the client, but include achievements such as reducing amount of medication, losing weight, or learning how to eat independently. Along with ensuring that an individual is working to achieve and continuously develop their ISP, Resident Directors are responsible for ensuring that a client's money is properly managed. Resident Directors report to an Area Director, who supervises six to seven Resident Directors (Seven Hills Foundation, n.d.). Resident Directors typically communicate with Area Directors through email, phone calls, and face to face communication (F. Agbanyo, Personal Interview, April 4, 2019).

Above the RDs on the hierarchical structure of the organization are the Area Directors. The Area Directors are responsible for managing six to

seven community homes. They ensure that each home has a designated RD that is providing quality services to each individual. Additionally, Area Directors monitor each residence to assure that they are in compliance with state, federal, and local safety, health, and regulatory requirements (Seven Hills Foundation, n.d.). Area Directors primarily communicate with Senior Leadership members, peers, and subordinates through email and face to face communication. The Area Directors are the connection between the individual residences and the Senior Leadership cabinet (K. Reynolds, Personal Interview, March 27, 2019).

At the top of the hierarchical structure of the organization are the Senior Leadership and President's cabinet. These cabinets are responsible for the overall performance of the Family Services affiliate. They ensure that clients have the opportunity to connect with their community by organizing events and programs. Members of both cabinet's consistently utilize mediums such phone calls, text messaging,

email, and face to face communication to communicate with peers and Area Directors (R. Neckes & D. Samarra, Personal Interview, February 6, 2019).

### **3.3: Community Homes**

Within the states of Massachusetts and Rhode Island, individuals with disabilities who are unable to live independently are able to find the support and care that they need at the Seven Hills Foundation. Hundreds of arrangements have been made over the past 60 years to provide group housing to these adults together in the community. With the support of the foundation's effective and highly coordinated system of care at these homes, each person is allowed their maximum level of independence and autonomy. The clients support team works with them to create an individual service plan that allows the individual to achieve their highest possible degree of well being. Participants have the choice to live with caregivers who are family members or non-relatives. Direct Service Providers work with

each individual to encourage community membership and help foster lifelong friendships. In order to help each person achieve his or her fullest potential, it is imperative for employees to maintain daily communication with their supervisors and registered nurses. (Seven Hills Foundation, Adult Residential Program, n.d.) The facilitation of internal communication within the Seven Hills Foundation is an essential factor in the continuous outreach of the organization. The goal of this project is to provide strategies and recommendations to overcome the barriers of establishing effective communication within the organization. We describe our methodological approach to accomplish this goal in the next chapter.



**Figure 3: Malboeuf A. Community Residential Housing**

# Methodology

At the Seven Hills Foundation, barriers within the communication channels of the organization are preventing some employees from effectively communicating with one another. Therefore, the goal of this project is to provide strategies and recommendations to overcome the barriers of establishing effective communication within the organization. Through interviews and focus groups with our sponsors, Senior Leadership members, Area Directors, Resident Directors, and Direct Service Providers we identified the barriers preventing employees from communicating effectively through email. From the barriers we identified we determined that the problem Seven Hills is facing with electronic communication is a social problem around getting staff to check email. After we redefined the scope of the problem, we researched the best practices and strategies that other organizations have used to promote electronic communication among employees.

Finally, we aggregated our findings and discussed our recommendations with the Human Resources department of the Seven Hills Foundation. We accomplished our goal by executing the following 3 objectives which will be discussed, along with the methods we will use to achieve them, in more detail below.

**Objective 1:** Identify the training needs of employees and the barriers that are preventing them from effectively communicating via email.

**Objective 2:** Research how organizations similar to the Seven Hills Foundation have achieved effective email communication.

**Objective 3:** Develop an employee reference resource and provide recommendations and training for efficient communication habits.

**Objective 1: Identify the training needs of employees and the barriers that are preventing them from effectively communicating via email.**

For Objective 1, we identified the training needs of Seven Hills employees and the barriers that prevent them from effectively communicating via email. It was important to identify the training needs and barriers in order to develop the recommendations and resources we made in objective 3.

In order to accomplish Objective 1, we began by directly observing how the community homes function. During each of our visits, we looked for the number of individuals living in the home, the number of staff on site during our visit, and the number and location of Seven Hills computers. We wanted to determine the typical staff to individual ratio within the community homes. Additionally, we wanted to find out the number of computers available for employees and where they are located within the house. Finally, we wanted to determine the types of services the Direct Support Providers and Residence Directors

provide individuals. We will use direct observation because it will allow us to understand the ongoing behaviors and processes within the daily routines of employees (Powell & Steele, 1996). We collected our direct observations through a checklist which can be found in Appendix B.

After directly observing how the shared living homes function, we either interviewed the Direct Service Providers (DSP) on shift, or conducted a focus group at the staff meeting of the house. We interviewed the DSPs one at a time. At the beginning of each interview, we had each DSP fill out a survey to gain an understanding of how they communicate with their peers and supervisors. While attending the staff meetings we conducted a focus group. The focus group consisted of Direct Service Providers (DSP), Residence Directors (RD), Area Directors (AD), and clinicians. Prior to the start of the focus group, we had each participant fill out a survey to determine how they communicate with peers, supervisors, and subordinates. We implemented the survey because surveys are effective tools when trying

to determine the prevalence of a certain attitude or experience (Morgan, 1996).

The survey provided us with information such as the employee's position within the organization, their preferred mediums of communication, and their frequency of email use. The interviews and focus groups informed us about how employees communicate confidential information, what information employees communicate via email, and the limitations of the email system. We conducted focus groups because they allowed us to compare employees views and experiences, rather than speculate about why their views differ (Morgan, 1996). See Appendix C for the survey questions. See Appendix D for the focus group and interview questions.

After conducting the focus groups and interviews, we categorized the employee responses in two different ways. First, we categorized the employee responses based on the employee's position within the organization. Then, using the categorization of barriers within

our literature review, we categorized the responses into the different barrier groups. Categorizing the responses by employee position allowed us to compare the barriers across the different employee positions. Grouping the barriers into different categories allowed us to determine which barriers are commonly affecting all employees.

## **Objective 2: Research how organizations similar to Seven Hills Foundation have achieved effective email communication.**

For Objective 2, we researched organizations similar to Seven Hills and conducted interviews to learn about how they achieved effective email communication. This was an important first step in our methodology because we wanted to identify existing solutions to the problem we will resolve. In order to complete Objective 2, we first identified organizations that are similar to the Seven Hills Foundation and follow a similar structural set up. Using the Association of Developmental Disabilities Providers website, we

identified organizations that were similar to Seven Hills based on our initial criteria. The initial criteria that we looked for was if the organization follows HIPAA protocol and if they have Direct Service Professionals caring for clients on a day to day basis. Organizations following HIPAA protocol are communicating confidential medical information about clients within their organization. The organization must have Direct Service Professionals, or a similar position, in order for us to see how both confidential and non-confidential information is communicated to employees without a traditional office.

After we identified organizations that meet our criteria we conducted over the phone semi-structured interviews with representatives from those organizations. In the interviews we discussed the primary ways in which the organizations communicate internally. We determined if the organization provides Direct Service Providers with company smartphones. Additionally, we determined how the organizations communicate confidential and

non-confidential information to front-line employees, while staying HIPAA compliant. See appendix B for the questions we asked during our interviews. We used semi-structured interviews because they are an effective tool in gathering qualitative research about an individual or organization (Harrell & Bradley, 2009).

After we conducted the interviews, we grouped the responses into technical and social solutions. The technical solutions covered responses that dealt with the different communication softwares organizations use and whether the organization provided staff with access to the software through an app on either their personal or company phone. The social solutions covered responses that dealt with defining employee expectations around electronic communication within the policies and procedures of the organization. Then we researched the technical and social solutions and determined if they could be applied to Seven Hills.



**Objective 3: Develop an employee reference resource and provide recommendations and procedures for efficient communication habits.**

For Objective 3, we first developed an employee reference resource to facilitate effective communication. It was important to develop a reference resource because we wanted employees to have the ability to resolve issues with email communication independently. We first identified if employees would use a reference resource through focus group questioning. The use of focus groups showed us the employees' perspectives on the potential effectiveness of a reference resource, and allowed us to determine the best way to implement the resource to ensure that it would be easily accessible to all employees. The reference resource consists of the instructions on how to bookmark the Seven Hills staff portal on an employee's personal smartphone. The resource provides instructions for both Android and Apple devices. Additionally, the reference resource provides employees with the login

credentials for the different accounts they must access to complete trainings, login to email, and record the hours they have worked. In order to determine what would be contained in the reference resource, we incorporated the questions found in Appendix E into the focus groups we used to achieve Objective 1.

In addition to creating a reference resource, we developed recommendations and procedures to promote effective communication habits. Using the information we gathered from completing objective 1, we were able to determine the barriers preventing Seven Hills employees from communicating effectively. From the barriers we identified we determined that the problem Seven Hills is facing with electronic communication is a social problem around getting staff to check email. To gain a better understanding of Seven Hills expectations of staff checking and responding to email we reviewed employee job descriptions, Seven Hills policies and procedures, staff orientation and trainings, and employee evaluations forms. While analyzing these

documents, we looked for specific language that outlined the expectations of employees with regard to electronic communication. After examining the documents, we highlighted the sections of the documents that we believed could provide more explicit expectations of employees and electronic communication. Then we met with Director of the Human Resource department at Seven Hills and showed her the sections of the documents that we recommend be revised. Using the contacts of Seven Hills employees, we gathered email policies from organizations similar to Seven Hills. We used these policies, along with suggestion from the Society of Human Resource Management to make the appropriate revisions to the documents we examined. Finally, we used the Society of Human Resource Management best practices of implementing a new policy to provide Seven Hills with a guide to properly implement the revised policy.

# Findings & Recommendations

After seven weeks of working closely with the Seven Hills Foundation to develop a strategy to improve upon the organization's electronic communication, our team would like to propose several recommendations. Predominantly, we have concluded that the foundation would benefit from changing the current employee policies and procedures. We recommend that the Seven Hills Foundation implements a policy that clearly outlines how employees are expected to communicate via email, allowing staff to have a better understanding of how frequently they should be checking and responding to email. In addition, revisions to the organization's employee evaluation forms that touch more on electronic communication would help compel employees to adapt to the standards set by the new policy.

The first change that we believe must occur at Seven Hills is to alter the current policies and procedures regarding electronic communication. After thorough review of the current policies we

have found that Seven Hills Administrative Policy #110 is the primary policy regarding email. Within the electronic communications section, we feel it is necessary to include guidelines around how frequently employees should check and respond to emails and other electronic communications. The second paragraph vaguely touches upon the expectations of employees checking their emails periodically throughout the day, however, we feel that this is insufficient and should include more information about what is expected of employees on a daily or weekly basis. After talking with members of Senior Leadership, we determined that the policy should split the expectations of employees checking email into three distinct employee categories. Hourly employees, should check their email at least once a shift. While salaried employees who have access to a company phone, should check their email regularly during working and non-working hours. Salaried employees who do not have access to a

company phone, should check their email regularly during working hours. With no written policies or procedures in place, employees do not know what is expected of them past what they are told by their supervisors. Our proposed policy change was adapted from university policies, human resource organizations policies, and other human health service organizations policies. These policies can be found in appendices G, H, and I respectively. By defining employees expectations around checking email, the policy will improve the current communication problem present at the Seven Hills Foundation.

Our second recommendation is with regards to the current job descriptions of employees at Seven Hills. After reviewing the different job descriptions we have found that they do not address the effective use of electronic communication. With no written guidelines addressing or measuring email use, employees do not know what is expected of them. For example, in the current job description of a Direct

Family Support Professional, neither the essential functions nor the additional functions of the employee position elaborate on the necessity of email use in the workplace. Within the essential functions section of the job description, communicating effectively is mentioned. The description however does not elaborate on what the Seven Hills Foundation believes to be considered effective communication. This section should include more information about what is expected with regards to both electronic and paper-based communication methods.

To ensure that the policies and procedures are followed appropriately, employees need to be aware of not only the policies, but also the consequences associated with not following them. Clearly stating the expectations of employees during regular evaluations would help establish this principle. The Seven Hills Foundation employee evaluation forms include an assessment of employees performance regarding communication. For all employee evaluations, the same organizational and

professional standards regarding communication are assessed. All performance evaluations state "Delivers clear and effective verbal and written communications in a professional manner and takes responsibility for understanding others." Employee evaluations are a qualitative assessment of their performance. These reviews should be achievement oriented, fair, accurate, and developmental. The standards regarding effective communication should be more clear in order to provide proper feedback. The evaluation should describe that the organization expects employees will deliver clear and effective verbal, written, and electronic communications in a professional manner and take responsibility for understanding others.

Through our investigations, we found it imperative that staff recognize the importance of understanding and following Seven Hills policies and procedures. We have determined that the best way to communicate this with staff is through additions to employee training sessions. We attended one day of new employee

orientation, where we learned about HIPAA regulations and procedures. During the orientation, we were not exposed to any training regarding the use of Seven Hills email. Upon orientation, new employees should be educated on the possibility of downloading the Outlook App and how it affects their privacy rights. Also, employees should be taught how to bookmark the Seven Hills staff portal on their personal smartphones. Additionally, orientation should discuss proper email etiquette, signatures, email encryption and retention practices. Appendix F contains a full list of email topics that should be covered in an employee training session. Employees should be advised to make a habit of checking email and taking training courses.

Currently, when an employee misses important organizational announcements or training notifications, their supervisors receive an email. Then supervisors seek out that employee and alert them of the notifications they missed because they did not check their email. To combat this issue and increase the accountability

of the employees, we recommend that supervisors require employees to sign for the notification they give them in person. When the employee signs for the message, the supervisor can discuss with them how long they have to complete the required training or organizational information that they missed.

We have developed a reference resource that goes through the steps necessary for an employee to bookmark the Seven Hills staff portal on their personal smartphone. The steps are provided for both Android and IOS devices, accompanied with pictures of the icons necessary for the user to press in order to properly complete each step. The resource will simplify the bookmarking process for employees who are not tech savvy. We recommend that these resources be posted next to each computer at the different programs. Additionally, we created a resource to inform employees how to access their employee ID number. Currently, employees need their employee ID number to login to the E-Academy training site. After talking

with directors at several programs, a common complaint that arose was that employees do not know how to access their employee ID number. Directors constantly have to provide employees with this information. Both the bookmarking reference resource and the employee ID number resource can be found in appendix J.

Our research has signified that the current communication methods used between employees has preserved the daily productivity of teams working in the foundations community homes. It is surmisable that the organization would benefit from the complete implementation of Microsoft Office 365 between salaried employees that check their email daily. When using outlook to email other outlook users, one can flag the email to set a reminder notification in the future, improving productivity. The organization currently has a finite amount of Office 365 Enterprise E3 licenses covering the Microsoft Teams application which is HIPAA compliant and can be used to help manage teams, programs, and affiliates alike.

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# Appendices

## Appendix A: Sample Checklist for Direct Observation of Employees

**Facilitator:** Mark Calnan

**Scribe:** Duncan Driscoll and Caleb Holmberg

How many individuals are living in the community home

☐ \_\_\_\_\_

How many Seven Hills staff were on site during the visit

☐ \_\_\_\_\_

What services do Direct Service Providers provide for individuals

- ☐ Cooking
- ☐ Housekeeping
- ☐ Bathing
- ☐ Driving
- ☐ Other:

Where is the Seven Hills computer located within the home

- ☐ Basement
- ☐ First Floor

Do Direct Service Providers and Resident Directors have Wifi access

- ☐ Yes
- ☐ No

## Appendix B: Sample Pre Interview and Focus Group Survey Questions

We are a group of students from Worcester Polytechnic Institute in Massachusetts. We are conducting a survey and focus group to identify the barriers of communication employees are facing within the Seven Hills Foundation. Your participation in this interview is completely voluntary and you may withdraw at any time. Please remember that your answers will remain anonymous. No names or identifying information will appear in any of the project reports or publications. This is a collaborative project between the Seven Hills Foundation and WPI, and your participation is greatly appreciated. If interested, a copy of our results can be provided at the conclusion of the report.

**Facilitator:** Mark Calnan

**Scribe:** Duncan Driscoll and Caleb Holmberg

- Which title best describes your position within the Seven Hills Foundation?
  - ☐ Senior Leadership Member
  - ☐ Area Director
  - ☐ Resident Director
  - ☐ Direct Service Provider
  - ☐ Other:
- How do you primarily communicate with supervisors?
  - ☐ Text Messaging
  - ☐ Phone Call
  - ☐ Email
  - ☐ Face to Face

- How do you primarily communicate with peers?
  - ☐ Text Messaging
  - ☐ Phone Call
  - ☐ Email
  - ☐ Face to Face
- How do you primarily communicate with subordinates (for RDs and ADs)?
  - ☐ Text Messaging
  - ☐ Phone Call
  - ☐ Email
  - ☐ Face to Face
- How often do you check your Seven Hills employee email?
  - ☐ Daily
  - ☐ 3-4 times per week
  - ☐ 1-2 times per week
  - ☐ Do not check email

## Appendix C: Sample Interview and Focus Group Questions for Identify Training Needs of Employees and the Barriers that are Preventing them from Effectively Communicating via Email

We are a group of students from Worcester Polytechnic Institute in Massachusetts. We are conducting a focus group to identify the training needs of employees with regard to the Seven Hills Foundation email platform. Your participation in this interview is completely voluntary and you may withdraw at any time. Please remember that your answers will remain anonymous. No names or identifying information will appear in any of the project reports or publications. This is a collaborative project between the Seven Hills Foundation and WPI, and your participation is greatly appreciated. If interested, a copy of our results can be provided at the conclusion of the report.

**Facilitator:** Mark Calnan

**Scribe:** Duncan Driscoll and Caleb Holmberg

- What are your thoughts on the current communication system at Seven Hills?
- How do you primarily communicate confidential clientele information?
- What limitations have you observed within the communication process at Seven Hills?
  - Which of these limitations are preventing you from utilizing your employee email?
  - Has your inbox ever exceeded the 50 mb data capacity?
- How confident are you in your ability to use the current Seven Hills email platform?
  - What device do you primarily use to access the email platform?
  - Do you have the Seven Hills staff portal bookmarked on your phone?
  - What aspects of email formality are you unfamiliar with?
  - What aspects of email and HIPAA compliance are you familiar with?
- What information do you primarily communicate via email?
- What are your thoughts on implementing a reference resource that would provide information on how to bookmark the Seven Hills staff portal and proper email etiquette?
  - How would you prefer to access the reference resource?



- What solutions have you thought of to help facilitate effective email communication within the foundation?
- How would a text messaging notification system for your email affect how frequently you check and respond to email?
  - A text messaging notification system for your email is a solution we are thinking of implementing that will send a text notification to your mobile phone.

## **Appendix D: Sample Interview Questions for Representatives from Organizations Similar to Seven Hills**

We are a group of students from Worcester Polytechnic Institute in Massachusetts. We are conducting an interview to determine how organizations internally communicate confidential client information to employees with limited access to company computers and smartphones. Your participation in this interview is completely voluntary and you may withdraw at any time. Please remember that your answers will remain anonymous. No names or identifying information will appear in any of the project reports or publications. This is a collaborative project between the Seven Hills Foundation and WPI, and your participation is greatly appreciated. If interested, a copy of our results can be provided at the conclusion of the report.

**Facilitator:** Mark Calnan

**Scribe:** Duncan Driscoll and Caleb Holmberg

- What communication mediums does your organization regularly utilize?
  - What email software does your organization use?
- Does your organization struggle with some employees not checking/responding to email?
  - Has your organization made any efforts in combating this issue?
- Does your organization provide all employees with a smartphone or pager?
  - Do employees use their personal smartphone for work email?
- Do employees communicate confidential medical information of clients?
  - How does your organization protect the information of clients when discussing information via email?
- Do managers/supervisors struggle to get in contact with frontline employees?

## Appendix E: Sample Focus Group Questions for Determining Effectiveness of Employee Reference Resource

We are a group of students from Worcester Polytechnic Institute in Massachusetts. We are conducting a focus group to determine the potential effectiveness of an employee reference resource within the Seven Hills Foundation. Your participation in this interview is completely voluntary and you may withdraw at any time. Please remember that your answers will remain anonymous. No names or identifying information will appear in any of the project reports or publications. This is a collaborative project between the Seven Hills Foundation and WPI, and your participation is greatly appreciated. If interested, a copy of our results can be provided at the conclusion of the report.

**Facilitator:** Mark Calnan

**Scribe:** Duncan Driscoll and Caleb Holmberg

- Do you have the Seven Hills employee portal bookmarked on your phone?
- Do you know how to bookmark or save a shortcut on your phone?
- Do you struggle to remember the various login credentials for the different Seven Hills resources located on the staff portal?
  - Would you find a reference document with the different login credentials on it helpful?
- Do you believe you would use an email training reference resource if it were available?

## Appendix F: Email Training Topics for Recommended Training

- Show the process for how to send an email: New Email > Recipient's Address > CC Addresses > Subject Line > Introduction > Message > Signature > Send with Encryption.
- Do not use the "Reply All" as a default and avoid using the "BCC" function. Using these tools creates duplicated messages and copies within the email system which need to be managed.
- Email is not a secure form of communication. Never send personally identifiable information in an e-mail message that is not encrypted. Remember that all your emails are monitored by the foundation and are subject to all applicable laws.
- Try to "touch" each email only once: act on it, refer it to someone else, or file it. Messages that are not records and are no longer needed should be deleted.
- Be mindful that email is a communications tool and not a collaborations tool. Don't let email prevent you from meeting with your colleagues face to face. Try not to send an email if a conversation is a more appropriate way to respond to a colleague; most people only skim long emails and are likely to miss the important information you want to share.
- Use outlook's email flag tool to set reminder notifications on the recipient's calendar, this will boost productivity and foster quicker response rates. This works for both Office 365 license holders as well as users of the Outlook Web App.
- Talk about one subject per email message. Categorizing and managing e-mail is much more straightforward when we manage the subject lines consistently. By organizing your email you are in the position to respond to requests for information, utilize information for future decision making and save costs in time searching for information. Simplistic subject lines like Hi! are often treated as SPAM or a potential virus threat. Try to keep one subject per message.

## Appendix G: Sample Email Policies from Universities

### Villanova University Email Policy:

#### 1. Purpose

Villanova University currently utilizes three solutions for email; a university managed system located on university servers ("Exchange Accounts"), a cloud-based system using Villanova's domain name pursuant to an agreement between the University and Google, Inc. ("Gmail Accounts"), and a cloud-based platform utilizing Microsoft's Office 365 ("Office 365 Accounts").

Collectively these are known as "University Email Accounts."

The purpose of this policy is to ensure the proper use of each of those solutions.

Electronic Mail is a tool provided by the University and serves as a primary means of communication and to improve education and administrative efficiency. Users have the responsibility to use this resource in an efficient, ethical and lawful manner. Use of University Email Accounts evidences the user's agreement to be bound by this policy. In the event a University employee holds multiple University Email Accounts, the most stringent rules of this policy shall apply.

#### 2. Policy Statement

##### 2.1 Account Creation

University Email Accounts are created based on the official name of the staff or faculty member as reflected in Human Resource, Payroll or Provost's Office records. Student and alumni accounts are created based on user ID reflective of the name on file with the Registrar. Requests for name changes to correct a discrepancy between an email account name and official University records will be processed, in which case the email account name will be corrected. This could be due to error or a person legally changing their name. Requests for mail aliases based on name preference, middle name, etc., are evaluated on a case-by-case basis.

Faculty, staff, or departments can request temporary email privileges for users outside of the University. Full time Faculty or Staff requesting these types of accounts will be required to submit user information, rationale for account, expiration date, & sponsor information. Such requests shall be approved by the appropriate Director level manager.

## 2.2 Ownership of Email Data

The University owns all University Email Accounts. Subject to underlying copyright and other intellectual property rights under applicable laws and University policies, the University also owns data transmitted or stored using the University Email Accounts.

## 2.3 Privacy and Right of University Access

While the University will make every attempt to keep email messages secure, privacy is not guaranteed and users should have no general expectation of privacy in email messages sent through University Email Accounts. Under certain circumstances, it may be necessary for UNIT staff or other appropriate University officials to access University Email Accounts. These circumstances may include, but are not limited to, maintaining the system, investigating security or abuse incidents or investigating violations of this or other University policies, and, in the case of Gmail/Office 365 Accounts, violations of Google's or Microsoft's Acceptable Use Policy or the University's contracts with Google and Microsoft.

UNIT staff or University officials may also require access to a University Email Account in order to continue University business where the University Email Account holder will not or can no longer access the University Email Account for any reason (such as death, disability, illness or separation from the University for a period of time or permanently). Such access will be on an as-needed basis and any email accessed will only be disclosed to individuals who have been properly authorized and have an appropriate need to know or as required by law.

## 2.4 Data Purging

### Gmail and Office 365 Accounts

Email messages held under Gmail and Office 365 Accounts will be subject to Google's and Microsoft's storage and retention policies, which may change from time to time, with or without notice. As of this writing, retention times are unlimited and storage limits are: Office 365 - 50GB and Gmail - 30GB.

### Exchange Accounts

Individuals are responsible for saving email messages as appropriate. Unless a legal hold has been placed on an account, messages in Exchange Accounts are automatically purged from folders as follows:

Sent / Sent Items - 60 days

Trash / Deleted Items - 15 days

Junk / Junk Email - 30 days

Due to finite resources, the University reserves the right to restrict the amount of user space on Microsoft Exchange Accounts. Individuals should not rely on an email account to archive data and each person is responsible for saving individual messages and attachments as appropriate.

## 2.5 Record Retention

It is the responsibility of employees to preserve University records, including emails or instant messages in particular circumstances:

- Those who have actual knowledge of matters in which it can be reasonably anticipated that a court action will be filed.
- A subpoena has been served or notice of same has been given.
- Records are sought pursuant to an audit or similar pending or possible investigation.

## 2.6 Data Backup

University Exchange Email Accounts are backed-up on a regular basis as a way of recovering from a systematic loss affecting the entire email system. User files and folders are not backed-up individually. Because restoration of the entire email system is a lengthy process, requests for email account restoration is generally granted only in the case that loss of the data significantly affects a business unit.

Restoration services for Gmail and Office 365 Accounts are only offered for messages that have been deleted no longer than 25 days.

## 2.7 Expiration of Accounts

Individuals may leave the University for a variety of reasons, which gives rise to differing situations regarding the length of email privileges or expiration of accounts. The policy governing those privileges are set forth below. Notwithstanding the guidelines below, the University (UNIT, EVP, Provost, Dean of Students, or General Counsel) reserves the right to revoke email privileges at any time.

Faculty who leave before retirement – Faculty who leave before retirement may keep their email account for one year from the end of the last term in which they taught. If such separation is for cause, email privileges may be immediately revoked without notice.

Staff who leave before retirement – Staff members who leave the University will have email privileges removed effective on their last worked day. If such separation is for cause, email privileges may be immediately revoked without notice.

- Retired Faculty – Faculty who have retired from the University will be permitted to retain their email privileges if their account remains active. All email accounts that are inactive for a period of one year will be removed.
- Retired Staff – Staff who have retired from the University will have email privileges removed effective on their last worked day.
- Students who leave before graduation – Students who leave the University without completion of their degree or other program may keep their email privileges for one academic year from the last term when they were registered.
- Expelled students - If a student is expelled from the University, email privileges will be terminated immediately upon the directive of the Dean of Students Office.



- Alumni – students who have graduated from the University will be permitted to retain their email privileges if their account remains active. All email accounts that are inactive for a period of one year will be removed. Alumni wishing to reconnect with the university can request an account and one may be provided to them. For alumni who do not wish to participate in the opt-in service to receive a Gmail Account, the University will hold the email address for 1 year. At the end of the year, the available email address may be reused. In the event the University terminates or otherwise ceases its contractual relationship with Google regarding the Gmail Accounts, those alumni with Gmail Accounts may lose email privileges for the Gmail Accounts in accordance with the terms of the Google contract. Notice will be provided as soon as reasonably possible.

## 2.8 Appropriate Use and User Responsibility

No data that is classified as Protected by the Data Classification Policy shall be stored in or transmitted via email. This includes but is not limited to personally identifiable information, Social Security number, bank account information, tax forms, background checks, sensitive research data, or other Protected Data. See the University Data Classification Policy for further information. Users who use email communications with persons in other countries should be aware that they may be subject to the laws of those other countries and the rules and policies on others systems and networks. Users are responsible for ascertaining, understanding and complying with the laws, rules, policies, contracts and licenses applicable to their particular uses.

Approval and transmission of email containing essential University announcements to students, faculty, and /or staff must be obtained from the Vice President for Communications, the Vice President for Information Technology/CIO or the responsible University official noted as follows:

For sending to all faculty, approval from the Provost is required

- For sending to all staff, approval from the Executive Vice President of Administration is required

- For sending to all students, approval from the Vice President of Student Life is required

Use of distribution lists or 'reply all' features of email should be carefully considered and only used for legitimate purposes as per these guidelines.

Any use of a University Email Account to represent the interests of a non-University group must be authorized by an appropriate University official.

In order to prevent the unauthorized use of email accounts, the sharing of passwords is strictly prohibited. Each individual is responsible for his/her account, including the safeguarding of access to the account. All email originating from an account is assumed to have been authored by the account holder, and it is the responsibility of that holder to ensure compliance with these guidelines.

UNIT maintains the University's official email systems; faculty, staff and students are expected to read email on a regular basis and manage their accounts appropriately. An email message regarding University matters sent from an administrative office, faculty, or staff member is considered to be an official notice.

Faculty, staff, or students who choose to use another email system (apart from the Gmail Accounts) are responsible for receiving University-wide broadcast messages and personal mail by checking the University's official email system and the University's World Wide Web Homepage.

## 2.9 Departmental Accounts

Requests for shared departmental accounts will be accommodated, but require a designation of an account holder, who will administer the addition, deletion, or modification of names within the account, as well as manage the account as per these guidelines. Supported types of shared accounts are designated as:

- Type 2 – This account will be able to receive mail from anywhere on the Internet, and will be able to respond directly to the sender. The generic id will be unable to access any of the predefined mailing groups that exist within the campus environment. Members of the group/organization utilizing this type of generic id will authenticate to the Type 2 account utilizing their own personal user ID and password. Mail sent from the generic id will not reflect the identity of the responder, but will instead carry the identity of the generic id.

#### 2.10 Personal Email Accounts

In order to avoid confusing official University business with personal communications, employees must never use non-university email accounts (e.g. personal Verizon, Comcast, etc.) to conduct Villanova University business.

#### 2.11 Inappropriate Use

With respect to University Email Accounts, the exchange of any inappropriate email content outlined below and described elsewhere in this policy, is prohibited. Users receiving such email should immediately contact UNIT, who in certain cases may also inform the Department of Public Safety, The Department of Human Resources, The Dean of Students or The Office of General Counsel.

The exchange of any email content outlined below is prohibited:

- Generates or facilitates unsolicited bulk email;
- Infringes on another person's copyright, trade or service mark, patent, or other property right or is intended to assist others in defeating those protections;
- Violates, or encourages the violation of, the legal rights of others or federal and state laws;
- Is for any malicious, unlawful, invasive, infringing, defamatory, or fraudulent purpose;
- Intentionally distributes viruses, worms, Trojan horses, malware, corrupted files, hoaxes, or other items of a destructive or deceptive nature;

- Interferes with the use of the email services, or the equipment used to provide the email services, by customers, authorized resellers, or other authorized users;
- Alters, disables, interferes with or circumvents any aspect of the email services;
- Tests or reverse-engineers the email services in order to find limitations, vulnerabilities or evade filtering capabilities;
- Constitutes, fosters, or promotes pornography;
- Is excessively violent, incites violence, threatens violence, or contains harassing content;
- Creates a risk to a person's safety or health, creates a risk to public safety or health, compromises national security, or interferes with an investigation by law enforcement;
- Improperly exposes trade secrets or other confidential or proprietary information of another person;
- Misrepresents the identity of the sender of an email.

Other improper uses of the email system include:

- Using or attempting to use the accounts of others without their permission.
- Collecting or using email addresses, screen names information or other identifiers without the consent of the person identified (including without limitation, phishing, spidering, and harvesting);
- Use of the service to distribute software that covertly gathers or transmits information about an individual;
- Conducting business for profit under the aegis of the University
- Political activities, specifically supporting the nomination of any person for political office or attempting to influence the vote in any election or referendum on behalf of or under the sponsorship of the University.

# University of Arizona:

## 1. University use of email

Email is a mechanism for official communication within the University of Arizona. The University has the right to expect that such communications will be received and read in a timely fashion. Official email communications are intended only to meet the academic and administrative needs of the campus community. As steward of this process, the Office of the Registrar is responsible for directing the use of the official student email.

## 2. Assignment of student email

Official University email accounts are available for all enrolled students. The addresses are all of the form [Name]@email.arizona.edu. These accounts must be activated before the University can correspond with its students using the official email accounts. The Account website has been designed for this purpose.

The official email address will be maintained in UAccess. Official email address will be directory information. As with other directory information, any student may request that his or her official email address be restricted in its access.

## 3. Redirecting of email

If a student wishes to have email redirected from their official @email.arizona.edu address to another email address (e.g., @aol.com, @hotmail.com, or an address on a departmental server), they may do so, but at their own risk. The University will not be responsible for the handling of email by outside vendors or by departmental servers.

Having email redirected does not absolve a student from the responsibilities associated with official communication sent to his or her @email.arizona.edu account. Information and warnings about forwarding are available at <http://uits.arizona.edu/services/email>.

#### 4. Expectations about student use of email

Students are expected to check their email on a frequent and consistent basis in order to stay current with University-related communications. Students have the responsibility to recognize that certain communications may be time-critical. "I didn't check my email", error in forwarding mail, or email returned to the University with "Mailbox Full" or "User Unknown" are not acceptable excuses for missing official University communications via email.

#### 5. Authentication for confidential information

It is a violation of University policies, including the Student Code of Conduct, for any user of official email addresses to impersonate a University office, faculty/staff member, or student. To minimize this risk, some confidential information may be made available only through UAccess Student, which is password protected. In these cases, students will receive email correspondence directing them to UAccess Student, where they can access the confidential information only by supplying their Net ID credentials. The confidential information will not be available in the email message.

#### 6. Privacy

Users should exercise extreme caution in using email to communicate confidential or sensitive matters, and should not assume that email is private and confidential. It is especially important that users are careful to send messages only to the intended recipient(s). Particular care should be taken when using the "reply" command during email correspondence.

#### 7. Educational uses of email

Faculty will determine how electronic forms of communication (e.g., email) will be used in their classes, and will specify their requirements in the course syllabus. This "Official Student Email Policy" will ensure that all students will be able to comply with email-based course requirements specified by faculty. Faculty can therefore make the assumption that students' official @email.arizona.edu accounts are being accessed, and faculty can use email for their classes accordingly.

## Montana State University:

### Introduction and Purpose:

There is an expanding reliance on electronic communication among students, faculty, staff, and administrators at Montana State University. This is motivated by the convenience, speed, cost-effectiveness, and environmental advantages of using electronic communications rather than printed communication. Further, MSU has experienced a wider geographic dispersion of students resulting in a direct need to communicate reliably and consistently via email as well as electronic messaging. Because of this increasing reliance on and acceptance of electronic communication, it is considered an official means for communication within MSU.

Implementation of this policy ensures that students have access to this critical—if not essential—form of communication. This policy will ensure that all students can access, and be accessed by email and other electronic means of communications, as the need arises. This is especially relevant as it relates to disseminating critical university-related information.

### Policy:

The student email policy provides guidelines regarding the following aspects of electronic communications as an official means of communication with students:

- University use of email;
- Assignment of student email addresses;
- Expectations of email communication between faculty and student, staff and student, and administrators and students.
- Announcements and targeted messages

**1. All students currently enrolled at Montana State University are required to have email addresses, as outlined below.**

## **2. University use of email**

All students currently enrolled at Montana State University are assigned an email address. Email is a mechanism for official communication within Montana State University. Official email communications are intended only to meet the academic and administrative needs of the campus community. Students must check regularly for targeted announcements and email communication from the university at a minimum of twice per week. Students have the responsibility to recognize that certain communications may be time-critical. As steward of the email system, the Registrar's Office, under the auspices of the Vice President for Student Success, is responsible for approving the usage of student email directed through the Banner Student Information System.

## **3. Assignment of student email**

Official University email accounts will be created automatically for all enrolled students in MSU Google Apps where the students logon from the link for Student E-mail on the MSU home page (<http://www.montana.edu>) with their NetID and password. Passwords can be set from the link for My Passwords off the MSU home page. Students may elect to update and change their Official University E-mail Address to a personal account for purposes of receiving official university communications. If a personal account is elected, it becomes the official university account for the student.



#### **4. Expectations about student use of email**

Students are expected to check their email no less frequently than twice a week in order to stay current with University-related communications.

Students have the responsibility to recognize that certain communications may be time-critical.

Faculty will determine how electronic forms of communication will be used in their classes, and will specify their requirements in the course syllabus. Faculty can therefore make the assumption that students' official e-mail is being accessed and they can use email, chats and message boards for their classes accordingly.

Failure to check for messages and failure to receive messages due to full mailboxes or auto-forwarded email are not acceptable excuses for missing official University communications.

Students may auto-forward email to an outside email client at their own risk. The university IT staff and Help Desk do not support auto-forwarding of email and will not assist in troubleshooting problems with outside email clients or forwarded email.

#### **5. Authentication for confidential information**

It is a violation of University policy (reference Paragraph 638.00.4 in the MSU Student Conduct Code: [/policy/student\\_conduct/](#)) for any user of official email addresses to impersonate a University office, faculty/staff member, or student. To minimize this risk, some confidential information may be made available only through MyInfo, which is password protected. In these cases, students will receive email correspondence directing them to MyInfo, where they can access the confidential information only by supplying their Student IDs and PINs. The confidential information will not be available in the email message.

## 6. Privacy

Email users should exercise extreme caution in using email to communicate confidential or sensitive matters, and should not assume that email is private and confidential. It is especially important that users be careful to send messages only to the intended recipient(s).

Particular care should be taken when using the "reply" command during email correspondence, because many mailing lists are configured to deliver replies to the entire list, not just the author of a given message.

- All use of email, including use for sensitive or confidential information, will be consistent with the Board of Regents policy statement on use of electronic email by students.
- Confidentiality of student records is protected under the Family Educational Rights and Privacy Act of 1974 (FERPA). All use of email, including use for sensitive or confidential information, will be consistent with FERPA.
- Email shall not be the sole method for notification of any official university action.

## 7. Educational uses of email

Faculty will determine how electronic forms of communication (e.g., email, course announcements, chats and message boards) will be used in their classes, and will specify their requirements in the course syllabus. This official student electronic communications policy will ensure that all students are able to comply with electronic-based course requirements specified by faculty. Faculty can therefore make the assumption that students' official email is being accessed and they can use email, chats and message boards for their classes accordingly.

### **Procedures:**

Official University email accounts will be created automatically for all enrolled students in MSU Google Apps where the students logon from the link for Student E-mail on the MSU home page (<http://www.montana.edu>) with their NetID and password. If a student elects to use a private email account, it becomes the official university email account for the student and the requirements of this policy apply to that email account.

**Internal control considerations, if applicable:**

It is a violation of University policy (reference Paragraph 638.00.4 in the MSU Student Conduct Code: [/policy/student\\_conduct/](#)) for any user of official email addresses to impersonate a University office, faculty/staff member, or student. To minimize this risk, some confidential information may be made available only through MyInfo, which is password protected. In these cases, students will receive electronic communications directing them to MyInfo, where they can access the confidential information only by supplying their Student ID and PIN. The confidential information will not be available in the email message. Users should exercise extreme caution in using electronic means to communicate confidential or sensitive matters, and should not assume that electronic communications is private and confidential. It is especially important that users are careful to send messages only to the intended recipient(s). Particular care should be taken when using the "reply" command during email correspondence.

- All use of e-mail, chats and message boards, including use for sensitive or confidential information, will be consistent with the Board of Regents Policy Statement on Use of Electronic E-mail
- Confidentiality regarding student records is protected under the Family Educational Rights and Privacy Act of 1974 (FERPA). All use of e-mail, including use for sensitive or confidential information, will be consistent with FERPA.
- Electronic communications shall not be the sole method for notification of any legal action.

# Worcester Polytechnic Institute:

## 1.0 Purpose

The purpose of this policy is to provide guidance on how and when University partner email systems are approved and verified and who has access and authority to use these systems to communicate with student, staff, faculty and other University constituents while upholding information security standards and conforming to the relevant state and federal laws.

At WPI, electronic mail (email) is recognized as official University correspondence. As such, WPI provides this guidance and standards to assure that all communications originating from the institution are professional, appropriate, and for the agreed upon purposes of the system. This guidance will also enable WPI community members to distinguish legitimate University email from unauthorized messages.

## 2.0 Definitions

- University Application Vendors- On premise or hosted third-party vendors that have a contractual relationship with WPI. WPI employees leverage software from these vendors to send email to students, employees or other university constituents.
- University Third Party Vendors- Third-party vendors with a contractual relationship with
- WPI that communicate directly with WPI students, employees or other university constituents.
- Email and Standing Lists – WPI maintains a variety of standing lists with membership and acceptable use policies.
- Group and Distributions Lists are defined in the WPI Mailing List Policy.

### 3.0 Systems and Distribution

Enterprise email systems of record and other third-party systems that have been assessed and approved by Administrative Systems Working Group (ASWG) are used by individuals in various divisions to conduct business communications as varied as emergency alerts and daily news and events updates to employees.

WPI contracts with University Third Party Vendors, such as those who administer benefits, retirement, and job search for students and alumni, which send email to the email address that is provided by the University. Because WPI has less control over University Third Party Vendors, they do not fall under this policy. However, the University will maintain a list of these vendors so that all employees are aware of who may be sending emails to them.

Any University Application Vendors that will send mail to WPI community members must be approved through WPI's ASWG committee and adhere to the standards in this policy. Third-party vendors, that are not vetted or fail to uphold WPI policy, may have their messages filtered prior to delivery.

### 4.0 Applicability

This policy applies to all members of the WPI community, including students, faculty, staff, trusted partners, contractors, and users of the university network and messaging systems.

### 5.0 Policy

All University requirements and relevant laws must be followed when sending messages to WPI community members.

Messages sent out via University Application Vendors must:

- Follow relevant federal, state, and local laws, including the CAN-SPAM Act of 2003
- Use templates that adhere to University marketing standards
- Have a clear, accurate "from" field indicating the name of the person or University unit sending the message. The "from" address and "reply-to" addresses should be wpi.edu email addresses. The ASWG may authorize exceptions only when the use of wpi.edu addresses is technically infeasible.
- Accurate and descriptive subject line.

- Text identifying the WPI community, including “WPI”, “Worcester Polytechnic Institute” “on behalf of WPI ‘department’ ” that is clearly identified in plain text messages and in the text-only portion that accompanies an HTML message.\*
- The message footer must contain the audience the message was sent to and the name and physical mailing address of the sending unit (e.g., "This message was sent to weekly newsletter subscribers by the Office of the President at WPI, Worcester Polytechnic Institute, 100 Institute Road, Worcester, MA 01609-2280").
- For optional communications, the message must contain straightforward instructions to allow recipients to opt-out of the communication and any opt-out requests must be handled in a timely manner.
- Links contained in the message should be to web addresses hosted in the wpi.edu domain.
- For websites hosted at the third-party vendor's website, IT Services will maintain a list of vendors along with their URLs for people to check if they have concerns and leverage
- Microsoft's Advanced Threat Protection to check URLs for threats.

## 6.0 Policy Enforcement

Any person that violates any of the policies found in this policy will be subject to the same disciplinary actions as outlined in WPI's Confidentiality Agreement for employees or Code of Conduct for students.

## Appendix H: Sample Email Policies from Human Resource Organizations

### **Society for Human Resource Management**

#### **Objective**

The Seven Hills Foundation recognizes that use of the Internet and e-mail is necessary in the workplace, and employees are encouraged to use the Internet and e-mail systems responsibly, as unacceptable use can place Seven Hills and others at risk. This policy outlines the guidelines for acceptable use of Seven Hills' technology systems.

#### **Scope**

This policy must be followed in conjunction with other Seven Hills policies governing appropriate workplace conduct and behavior. Any employee who abuses the company-provided access to e-mail, the Internet, or other electronic communications or networks, including social media, may be denied future access and, if appropriate, be subject to disciplinary action up to and including termination. Seven Hills complies with all applicable federal, state and local laws as they concern the employer/employee relationship, and nothing contained herein should be misconstrued to violate any of the rights or responsibilities contained in such laws.

Questions regarding the appropriate use of Seven Hills' electronic communications equipment or systems, including e-mail and the Internet, should be directed to your supervisor or the information technology (IT) department.

#### **Policy**

Seven Hills has established the following guidelines for employee use of the company's technology and communications networks, including the Internet and e-mail, in an appropriate, ethical and professional manner.

## **Confidentiality and Monitoring**

All technology provided by Seven Hills, including computer systems, communication networks, company-related work records and other information stored electronically, is the property of Seven Hills and not the employee. In general, use of the company's technology systems and electronic communications should be job-related and not for personal convenience. Seven Hills reserves the right to examine, monitor and regulate e-mail and other electronic communications, directories, files and all other content, including Internet use, transmitted by or stored in its technology systems, whether onsite or offsite.

Internal and external e-mail, voice mail, text messages and other electronic communications are considered business records and may be subject to discovery in the event of litigation. Employees must be aware of this possibility when communicating electronically within and

## **Appropriate Use**

Seven Hills employees are expected to use technology responsibly and productively as necessary for their jobs. Internet access and e-mail use is for job-related activities; however, minimal personal use is acceptable.

Employees may not use Seven Hills' Internet, e-mail or other electronic communications to transmit, retrieve or store any communications or other content of a defamatory, discriminatory, harassing or pornographic nature. No messages with derogatory or inflammatory remarks about an individual's race, age, disability, religion, national origin, physical attributes or sexual preference may be transmitted. Harassment of any kind is prohibited.

Disparaging, abusive, profane or offensive language and any illegal activities—including piracy, cracking, extortion, blackmail, copyright infringement and unauthorized access to any computers on the Internet or e-mail—are forbidden.

Copyrighted materials belonging to entities other than Seven Hills may not be transmitted by employees on the company's network without permission of the copyright holder.



Employees may not use Seven Hills' computer systems in a way that disrupts its use by others. This includes sending or receiving excessive numbers of large files and spamming (sending unsolicited e-mail to thousands of users).

Employees are prohibited from downloading software or other program files or online services from the Internet without prior approval from the IT department. All files or software should be passed through virus-protection programs prior to use. Failure to detect viruses could result in corruption or damage to files or unauthorized entry into company systems and networks.

Every employee of Seven Hills is responsible for the content of all text, audio, video or image files that he or she places or sends over the company's Internet and e-mail systems. No e-mail or other electronic communications may be sent that hide the identity of the sender or represent the sender as someone else. Seven Hills' corporate identity is attached to all outgoing e-mail communications, which should reflect corporate values and appropriate workplace language and conduct.

I have read and fully understand this policy. I understand that my use of Seven Hills' information and communication technology constitutes full acceptance of the terms of this policy and consent to monitoring.

## Appendix I: Sample Email Policies from Organizations Similar to Seven Hills

### Ascentria

#### 1.0. PURPOSE

To establish guidelines governing the appropriate use of ASCENTRIA CARE ALLIANCE- provided electronic messaging systems including, but not limited to email and instant messaging.

#### 2.0. APPLICABILITY

All employees of Ascentria Care Alliance and its subsidiaries.

#### 3.0. POLICY

3.1. General Guidelines:

3.1.1 The email/electronic messaging systems are ASCENTRIA CARE ALLIANCE property. All messages stored in ASCENTRIA CARE ALLIANCE-provided electronic messaging system(s) or composed, sent or received by any employee or non-employee are the property of ASCENTRIA CARE ALLIANCE.

3.1.2. ASCENTRIA CARE ALLIANCE reserves the right to intercept, monitor, review and/or disclose any and all messages composed, sent or received.

3.1.3. ASCENTRIA CARE ALLIANCE reserves the right to alter, modify, re-route or block the delivery of messages as appropriate.

3.1.4. The email addresses and/or instant messaging identifiers assigned to a employee are the property ASCENTRIA CARE ALLIANCE. Employees shall use these identifiers only while employed by the Agency.

3.2. Confidentiality:

3.2.1. Employees must never disclose or transmit through email or instant messages ASCENTRIA CARE ALLIANCE proprietary or confidential information or other privileged information or communications unless proper authorization has been secured.

3.2.2. Employees must use caution and judgment in determining whether a message should be delivered electronically versus in person.

3.2.1 Employee shall not copy and distribute material owned and copyrighted by third parties unless properly authorized.

3.3. Security:

3.3.1. Employees must not disable anti-virus software running on Agency- provided computer equipment.

3.3.2 To prevent viruses, "worms" and other malicious code from spreading, employees must:

- Be suspicious of messages sent by people not known personally.
- ☐ Not open attachments unless such were expected. If the employee is not sure, he/she must always verify that the sender is someone known personally and that he or she actually sent the email attachment.
- ☐ Disable features in electronic messaging programs that automatically preview messages before opening them.
- ☐ Not forward chain letters; they must simply be deleted.

3.3.3. ASCENTRIA CARE ALLIANCE considers unsolicited commercial email (spam) a nuisance and a

potential security threat. Employee must not attempt to remove themselves from future deliveries of unsolicited commercial email (spam) messages. These "Remove Me" links are often used as a means to verify that the employee exists.

3.3.4. Employees must not use ASCENTRIA CARE ALLIANCE-provided email addresses when posting to message boards.

#### **3.4. Inappropriate use:**

3.4.1. Email or electronic messaging systems shall not be used for transmitting messages containing pornography, profanity, derogatory, defamatory, sexual, racist, harassing, or offensive material.

3.4.2. ASCENTRIA CARE ALLIANCE-provided electronic messaging resources may not be used for the promotion or publication of one's political or religious views, the operation of a business or for any undertaking for personal gain.

## Venture Community Services, Inc.

Venture makes email available to its employees where it is relevant and useful for their positions. This email use policy describes the rules governing email use at the company. It also sets out how staff members are expected to behave when using email.

### General email Guidelines

#### Business email use

Venture recognizes that email is a key communication tool. It encourages its employees to use email whenever appropriate.

For instance, staff members may use email to:

- Communicate with colleagues about job related matters
- ☐ Distribute information to colleagues
- ☐ Learn about Venture job postings
- ☐ Obtain information about Venture fundraisers /events

### Personal use of email

The company also recognizes that email is an important tool in many people's daily lives. As such, it allows employees to use their company email account for personal reasons, with the following stipulations:

- Personal email use should be for a reasonable level and restricted to non- work times, such as breaks and during lunch.
- ☐ All rules described in this policy apply equally to personal email use. For instance, inappropriate content (as defined below) is always inappropriate, no matter whether it is being sent or received for business or personal reasons.
- ☐ Personal email use must not affect the email service available to other users. For instance sending exceptionally large files by email could slow access for other employees.
- ☐ Users may access their own personal email accounts at work, if they can do so via our
- Guest Wi-Fi internet connection. For instance, a staff member may check their Yahoo or
- Gmail account during their lunch break.

## Authorized Users

Only People who have been authorized to use email at Venture may do so. Authorization is usually provided at date of hire or granted by the IT department per Supervisors Approval.

Unauthorized use of the company's email system is prohibited.

Employees who use company email without authorization – or who provide access to unauthorized people – may be subject to disciplinary action.

## Key Areas

### Email Security

Used inappropriately, email can be a source of security vulnerability for the company. Users of the company email system must not:

- Open email attachments from unknown sources, in case they contain a virus, spyware and/or other malware.
- Disable security or email scanning software. These tools are essential to protect the business from security problems.
- ❑ Send confidential company data via email. The IT Department can advise on appropriate tools to use instead.

- Access another user's company email account. If they require access to a specific message (for example, while an employee is out sick), they should email a request to both their direct supervisor and the IT Department.

Employees must always consider the security of the company's systems and data when using email. If required, help and guidance is available from the IT Department at any time.

Users should note that email is not inherently secure. Most emails transmitted over the internet are sent in plain text. This means they are vulnerable to interception. Although such interceptions are rare, it's best to regard email as an open communication system, not suitable for confidential messages and information.

## **Inappropriate email content and use**

The company email system must not be used to send or store inappropriate content or materials.

It is important employees understand that viewing or distributing inappropriate content via email is not acceptable under any circumstances.

Users must not:

- Create or distribute any inappropriate content or material via email.
  - ☐ Use email for any illegal or criminal activities.
  - ☐ Use the email system in any way which violates Venture policies
- Inappropriate content includes, but is not limited to: pornography, racial or religious slurs, harassing comments, information encouraging criminal skills or terrorism, or materials relating to gambling and illegal drugs.

This definition of inappropriate content or material also covers any text, images or other media that could reasonably offend someone on the basis of race, age, sex, religious or political beliefs, national origins, disability, sexual orientation or any other characteristic protected by law.

Any user who receives an email they consider to be inappropriate should report this to his or her direct supervisor or the IT Department.

## **Contracts and liability**

Users must be careful about making commitments or agreeing to purchases via email.

An email message may form a legally-binding contract between Venture and the recipient –even if the user has not obtained proper authorization within the company.

## Email marketing and bulk email

Venture may use email to market to existing or potential sponsors. There is significant legislation covering bulk email and use of email for marketing. All email campaigns must be authorized by the marketing manager and implemented using the company's email marketing tool. IMPORTANT: Users must not send bulk emails using the standard business email system. All questions about email marketing should be directed to either the marketing manager or the IT department.

## Email Best Practice/Email etiquette

Email is often used to communicate with customers, partners and other important contacts. Although a relatively informal medium, staff should be aware that each email they send does affect the company's image and reputation.

It is a good idea to follow rules of good email etiquette. Users must:

- Not forward on chain emails or 'humorous' messages. These clog up people's in-box and some topics are not appropriate for the workplace.

- Always use a meaningful subject line rather than leaving it blank or using a single word like 'hello'.
- ☐ Only use the 'important message' setting sparingly, for messages that really are important.
- ☐ Never ask recipients to send a 'message read' receipt. Many people find these annoying and not all email services support them.
- ☐ Do not use ALL CAPITAL LETTERS or excessive punctuation in messages or subject lines. This can be perceived as impolite.
- ☐ Use the 'BBC' (blind carbon copy) field to send group messages where appropriate. It stops an email recipient seeing who else was on the email.

## Policy Enforcement

### Monitoring email use

Ventures email system and software are provided for legitimate business use. The company therefore reserves the right to monitor employee use of email. Any such examinations or monitoring will only be carried out by authorized staff.

Additionally, all emails sent or received through the company's email system are part of official Venture records. The company can be legally compelled to show that information to law enforcement agencies or other parties. Users should always ensure that the business information sent via email is accurate, appropriate, ethical and legal.

### **Potential sanctions**

Knowingly breaching this email use policy is a serious matter. Users who do so will be subject to disciplinary action, up to and including termination of employment.

Employees, contractors and other users may also be held personally liable for violating this policy.



Where appropriate, the company will involve the police or other law enforcement agencies in relation to breaches of this policy.



## Appendix J: Reference Documents

# Bookmarking Seven Hills Employee Portal on iPhone, iPad, & iTouch




1.) Launch Safari  or Chrome  browser and navigate to [staff.sevenhills.org](http://staff.sevenhills.org).

2.) Login to the staff site:

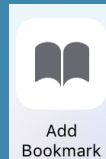
Username: first initial + last name

Password: Seven Hills email password


### Safari Instructions

3.) Tap the share icon  on the bottom of the browser.

4.) Tap the "Add Bookmark" icon.



### Chrome Instructions

3.) For Chrome, tap the share icon  in the top right corner in the address bar.

4.) For Chrome, tap the "Bookmark" icon.



5.) If you need help retrieving your login information, call the Seven Hills IT Help Desk, 508.983.2960.



# Bookmarking Seven Hills Employee Portal on Android

1.) Launch Chrome  browser and navigate to [staff.sevenhills.org](http://staff.sevenhills.org).

2.) Login to the staff site:

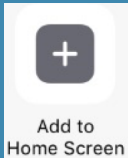
Username: first initial + last name

Password: Seven Hills email password

3.) Tap the menu button.



4.) Tap the "Add to Home Screen" button.



5.) Name Bookmark "Seven Hills."

6.) If you need help retrieving your login information, call the Seven Hills IT Help Desk, 508.983.2960.

# Accessing Your Employee ID Number

## Option 1:

1.) Your employee ID number can be found on your pay stub.

## Option 2:

1.) Login to the Seven Hills Staff Portal.  
2.) Click on the iSolved at the top of the screen.

Staff Portal

E-PAY

iSolved

SHIFTBOARD

4.) Your employee ID number can be located under your name in the gray bar at the top of the screen.



6.) If you need help retrieving your login information, call the Seven Hills IT Help Desk, 508.983.2960.

3.) Login to your iSolved account using your Seven Hills email login.