

<b>LAND TRUSTS PROTECTION &amp; ADVOCACY OFFICE</b> <b>07.06 ADVOCACY OFFICE SOCIAL MEDIA POLICY</b>	
<b>EFFECTIVE DATE:</b> <i>pending</i>	<b>REVISION DATE:</b>
<b>SUMMARY:</b> THE ADVOCACY COMMITTEE ADOPTS THE FOLLOWING POLICY TO GUIDE SOCIAL MEDIA USE, PREVENT ANY FORM OF ABUSE AND CLEARLY OUTLINES WHAT IS AND IS NOT ACCEPTABLE ON ADVOCACY OFFICE SOCIAL MEDIA CHANNELS.	

## REFERENCES

- A.13 Advocacy Office Social Media Best Practice Guidelines
- [Social Media Use Guidelines for Government Agencies by the Division of Archives and Records Service](#)
- [DHRM Code R477-9-8 — Personal Blogs and Social Media Sites](#)

## DEFINITIONS

- **User:** An individual who accesses, follows, or interacts with the Advocacy Office's official social media accounts. Users may include members of the public, beneficiaries, and employees.
- **Social Media Administrator:** An authorized employee responsible for managing, posting, and monitoring content on the Advocacy Office's official social media accounts in accordance with this policy and internal guidelines.

## PURPOSE

- The Advocacy Office uses social media to engage the public, raise awareness of the Trust System, and inform beneficiaries and other stakeholders. This policy upholds users' freedom of speech while fostering a safe and respectful environment. The policy outlines acceptable conduct on the Office's social media channels.

## POLICY

### SOCIAL MEDIA CONTENT

- All content must reflect the professional nature of the Advocacy Office as a State government entity. The following guidelines apply to all original postings and responses on Advocacy Office social media accounts:
  - Content should be polite, respectful and courteous.
  - Content should be friendly and conversational while remaining professional.
  - Sarcasm and colloquialism should be avoided.
  - Content that is condescending, critical, or otherwise unprofessional is not permitted.

### EMPLOYEE INTERACTIONS ON SOCIAL MEDIA

- Employees who are not authorized social media administrators must exercise caution when discussing Advocacy Office projects, policies, or issues on personal social media accounts. Any personal opinions expressed should clearly indicate that they do not represent the position of the Advocacy Office. For example, a disclaimer such as, “These are my own thoughts and do not necessarily represent the position of the Advocacy Office,” is recommended (see DHRM Rule R477-9-8)
- Please be aware that inappropriate online behavior – especially hate speech – is unacceptable for Advocacy Office employees, even on their own personal accounts, and may result in disciplinary action.

#### **USER'S RIGHT TO FREEDOM OF SPEECH**

- The Advocacy Office acknowledges and upholds users' First Amendment rights, recognizing that individuals can openly express their thoughts and opinions through social media accounts. The Advocacy Office-sponsored platforms provide an environment for diverse perspectives and public discourse.
- While the content on the Advocacy Office platforms is monitored to ensure safe and respectful dialogue, the Advocacy Office recognizes users' rights to comment, post or express their views. The Advocacy Office reserves the right to remove any content that it deems to be offensive or inappropriate including the listed categories in “User Expectations”.

#### **USER EXPECTATIONS**

- Offensive, harmful, or misleading content will not be tolerated. The following are prohibited on all Advocacy Office social media platforms and are not protected speech:
  - Sexually explicit content
  - Nudity
  - Pornography
  - Obscenity or profanity
  - Discriminatory language targeting protected classes (e.g., race, ethnicity, national origin)
  - Language that violates the law or promotes illegal activity
  - Defamation
  - Threatening or violent language
  - Spam or malware
  - Commercial advertisements
- The Advocacy Office may limit the visibility of certain content and may remove content entirely, block a user, or take other actions permitted by law, depending on the severity of the violation and potential repeated offenses.
- Users who believe their content was taken down in error may contact the office directly at [Landtrustsadvocacy@utah.gov](mailto:Landtrustsadvocacy@utah.gov).

#### **COMPLIANCE WITH PUBLIC RECORDS LAWS**

- Comments, messages, and other content posted on any Advocacy Office page may be subject to public records laws and retained as part of Advocacy Office records as required by the Division of Archives and the Government Records Access and Management Act. In compliance with state and federal regulations, all social media content may be accessible through open records requests.

## ADVOCACY OFFICE SOCIAL MEDIA GUIDELINES

All content on the Advocacy Office social channels should promote Advocacy Office goals and emphasis areas. In general, if the content doesn't fit into one of the following charts, it likely doesn't belong on Advocacy Office channels.

Emphasis Area	Topics for Social Channels
Trust System Awareness & Education	<p>Content builds public understanding of Utah's Trust System and the role of trustees:</p> <ul style="list-style-type: none"><li>• Trustee duties and fiduciary principles</li><li>• Beneficiary rights and interests</li><li>• Highlighting partner trust entities (TLA, SITFO, and the School Children's Trust Office)</li><li>• "Did you know?" facts that promote trust understanding</li></ul>
Beneficiary Outreach & Engagement	<p>Content highlights the School &amp; Institutional Trust Land beneficiaries:</p> <p>Beneficiary programs funded by trust revenues</p> <ul style="list-style-type: none"><li>• School and institution-specific impact spotlights</li><li>• Community outreach and collaboration with beneficiaries</li><li>• Recognition of beneficiary achievements tied to trust support</li></ul>
Advocacy Office Role and Highlights	<p>Content reinforces the Advocacy Office's purpose, mission and role:</p> <ul style="list-style-type: none"><li>• Vision, mission, and strategic updates</li><li>• Reports, newsletters, and publications</li><li>• Advocacy Office led events, meetings, and public engagement</li><li>• Updates related to governance and statutory responsibilities</li></ul>
Stakeholder & Partner Collaboration	<p>Content highlights collaboration that strengthens the Trust System and outcomes for beneficiaries.</p> <p>Examples:</p> <ul style="list-style-type: none"><li>• Work with K-12 and higher education partners (PTA, UEA, UAEPS, UASSP, etc.)</li><li>• Collaborations with state entities, legislators, and elected officials</li><li>• Industry partnerships that support responsible trust revenue generation</li></ul>
Support for Statewide Initiatives	<p>Content highlights the Advocacy Office's participation statewide efforts that support shared goals and strengthen Utah communities</p> <ul style="list-style-type: none"><li>• Participation in statewide campaigns (e.g., Giving Week, Show Up Utah, emergency preparedness)</li><li>• Joint efforts with state on shared initiatives</li></ul>

## **TONE AND PROFESSIONALISM**

In addition to the subject matter, the tone of the Advocacy Office social media outreach is of paramount importance. All content must reflect the professional nature of the Advocacy Office as a State government entity. The following guidelines apply to all original postings and responses on Advocacy Office social media accounts:

- Content should be polite, respectful and courteous.
- Content should be friendly and conversational while remaining professional.
- Sarcasm and colloquialism should be avoided.
- Content that is condescending, critical, or otherwise unprofessional is not permitted.

Keep in mind that as an extension of the public forum, all social media interactions are obtainable to the public via GRAMA request. Each platform has a built in archive system, and should be retained for that purpose.

## **QUALITY ASSURANCE AND QUALITY CONTROL**

Social media administrators for the Advocacy Office must employ the following quality assurance/quality control policy in content development:

1. Social media administrator drafts social media posts and updates
2. Posts and updates must be reviewed by a second member of the team for accuracy, spelling, grammar, tone, and alignment with Advocacy Office guidelines before posting.

Do not sacrifice quality for the sake of immediacy. Where possible, posts should be planned out, drafted, and approved ahead of time.

## **RESPONSE GUIDELINES**

The Advocacy Office aims to respond to comments and inquiries on social media in a timely and professional manner. It will often be appropriate to respond with, “We are looking into your concerns and will get back to you with an answer.” If a valid complaint or concern is expressed, respond to the situation quickly and try to address the concern through more direct communication, such as private message or email. When responding to comments and inquiries it should be recognized when a response is unnecessary, such as comments that are off-topic, duplicate, or not constructive. Deleting posts should be rare and only done in accordance with the office’s social media policy.

## **SHARING CONTENT**

Posts on social media are meant to be shared. This is done with the primary objective of reaching a larger audience. Discretion should be taken before sharing content from a social media channel outside the Advocacy Office. As a general rule, only content with a direct relation to the *emphasis areas* and maintains alignment with the tone and professionalism of the Advocacy Office should be shared from outside sources.

<b>LAND TRUSTS PROTECTION &amp; ADVOCACY OFFICE</b> <b>02.02 EMPLOYEE PERFORMANCE EVALUATION POLICY</b>	
<b>EFFECTIVE DATE:</b> <i>pending</i>	<b>REVISION DATE:</b>
<b>SUMMARY:</b> THE ADVOCACY COMMITTEE ADOPTS THE FOLLOWING POLICIES REGARDING THE ANNUAL EVALUATION FOR ADVOCACY OFFICE EMPLOYEES.	

## REFERENCES

- [DHRM Code R477-10-1,-2,-3 Performance Evaluation](#)
- Employee Annual Evaluation Form (appendix)

## DEFINITIONS

- **Performance Plan:** A written summary of the expectations for successful performance related to the duties of the job and specific goals for the performance year.
- **Performance Improvement Plan:** A formal document outlining an employee's performance deficiencies and the steps they must take to meet job standards within a specific timeframe.
- **Interested parties:** Office colleagues or external partners that the office serves or interacts with.

## PURPOSE

- The purpose of this policy is to establish a consistent and transparent process for conducting annual employee evaluations at the Land Trust Protection and Advocacy Office. Evaluations should support professional growth, enhance performance, recognize achievements, and align individual goals with the mission of the Advocacy Office. This policy ensures accountability, promotes open communication between employees and supervisors, and fosters a culture of continuous improvement and organizational excellence.

## POLICY

### ANNUAL EVALUATION

- Each employee shall receive a comprehensive performance evaluation annually, conducted by the office director.
- Evaluations will assess performance relative to established job duties, goals, and competencies.
- The evaluation process may incorporate work samples or input from interested parties when appropriate.
- The director shall review compensation, performance goals, and professional development needs as part of the evaluation.
- Employee evaluations should generally be conducted during the third quarter of the fiscal year, aligning with the office's budget and planning cycle.

## ADMINISTRATION OF FEEDBACK

- The director shall determine the most effective process for gathering performance feedback each year, using available tools such as surveys, peer input, or project reviews.
- The director shall ensure consistency and fairness in the evaluation process across all positions.
- The director shall document all evaluations using the **Employee Annual Evaluation Form** and maintain signed copies in secure files.
- The director shall provide employees with regular verbal and written feedback based on the standards of performance and behavior outlined in the annual review.

## PERFORMANCE IMPROVEMENT

- Management may use written warnings to address performance or conduct problems.
- If performance concerns are identified, the director may:
  - Develop a Performance Improvement Plan (PIP) with measurable goals.
  - Provide a formal evaluation at the end of the established timeframe.
  - Failure to successfully complete a PIP may result in separation of employment.
- The director may seek assistance from DHRM for documentation, guidance, or mediation related to performance management per DHRM Administrative Rule R477-10-2.

## AT-WILL EMPLOYMENT

- Employees of the Land Trusts Protection and Advocacy Office are at-will, meaning they may be dismissed at any time, with or without cause, consistent with applicable state law and office policy.
- Termination decisions will be made by the director, with notice to the Advocacy Committee.

## RECORD KEEPING AND CONFIDENTIALITY

- The director shall maintain all performance evaluations in secure files in coordination with DHRM.
- Evaluation documents and performance records shall be retained and disposed of according to the State Records Retention Schedule.
- Completed evaluations are considered non-public private records pursuant to Utah Code § 63G-2-302(2)(a).
- All feedback and discussions related to employee performance shall be conducted respectfully, confidentially, and in compliance with applicable employment laws.

**LAND TRUSTS PROTECTION AND ADVOCACY OFFICE**  
Annual Employee Evaluation and Performance Plan Form

Employee:	Review Period:
Review Date:	Advocacy Office Director:

#### **A. SELF ASSESSMENT (completed by employee):**

1. Review of core duties associated with position:
2. Key accomplishments this year:
3. Challenges you faced and how you managed them:
4. What helped you succeed / what held you back?
5. What skills or knowledge would you like to develop?

6. Suggestions to improve the agency?

## B. Evaluation Rubric | Completed by Director

Rate each area using the performance evaluation scale below.

### Performance Evaluation Scale

Rating	Definition
4 – Exceeds Expectations	Performance consistently surpasses established goals and job requirements. Demonstrates exceptional initiative, quality of work, and impact. Regularly contributes innovative ideas and serves as a model for others.
3 – Meets Expectations	Performance fully meets established goals and job requirements. Work is consistently reliable, effective, and of high quality. Demonstrates competence and contributes positively to team and organizational objectives.
2 – Needs Improvement	Performance sometimes meets expectations but is inconsistent. May require additional guidance, training, or effort to meet established goals and standards on a regular basis.
1 – Does Not Meet Expectations	Performance fails to meet job requirements or organizational standards. Immediate and sustained improvement is necessary to continue in the role.
N/A	Not applicable to roles or not evaluated this period.

Competency Area	Rating	Comments
Job Knowledge & Skills		
Quality & Accuracy of Work		
Dependability & Initiative		
Communication & Collaboration		
Problem-Solving & Judgment		
Adaptability & Flexibility		
Alignment with Agency Mission and Values		

**Advocacy Office Director Summary of Performance:**

## C. Performance Plan | Completed together

Review of Last Year's Goals (if applicable):

1.

2.

3.

Goals for Coming Year:

1.

2.

3.

Training/Development Opportunities Identified:

## D. Signatures

Employee Signature:	Date:
Advocacy Office Director Signature:	Date:

\*Signature indicates the review has been discussed, not necessarily agreement with all content.

<b>LAND TRUSTS PROTECTION &amp; ADVOCACY OFFICE</b> <b>02.07 EMPLOYEE GRIEVANCE POLICY</b>	
<b>EFFECTIVE DATE:</b>	<b>REVISION DATE:</b>
<b>SUMMARY:</b> THE ADVOCACY COMMITTEE ADOPTS THE FOLLOWING POLICY TO SUPPORT FAIR AND APPROPRIATE PROCEDURES FOR HANDLING GRIEVANCES WITHIN THE OFFICE.	

## REFERENCES

- [DHRM Code R477-15](#)
- Employee Grievance Form: See Appendix

## DEFINITIONS

- **Grievance:** A formal, written employee complaint alleging unfair treatment, unsafe working conditions, discrimination, harassment, or a violation of office policy, law, or regulation.
- **Complainant:** The employee submitting the grievance.
- **Reviewing Authority:** The Director or designee responsible for reviewing the grievance if it cannot be resolved at the supervisory level.
- **Interested Parties:** Individuals or entities directly involved in or affected by the grievance.

## PURPOSE

- The purpose of this policy is to establish a fair, efficient, and confidential process for employees of the Land Trusts Protection and Advocacy Office to raise and resolve workplace grievances. This policy promotes an open and professional environment in which employee concerns can be addressed promptly and appropriately.

## POLICY

### RIGHT TO FILE A GRIEVANCE

- Employees are encouraged to resolve concerns informally with their supervisor whenever possible.
- If informal resolution is not successful or appropriate, an employee may submit a formal written grievance using the Employee Grievance Form within 15 working days of the incident or decision giving rise to the concern.

### GRIEVANCE PROCEDURE

#### Step 1 – Initial Review

- The employee shall submit the written grievance to the office director and provide a copy to the assigned DHRM Agency Partner.
- The director shall review the grievance, discuss it with the employee, investigate interested parties, and provide a written response within 10 working days. DHRM may assist in this process if requested by the director. DHRM will maintain a copy of the response.
- If the grievance involves the director, the employee may submit the grievance directly to the Advocacy Committee Chair and assigned DHRM Agency Partner.

## **Step 2 – Secondary Review**

- If the employee is dissatisfied with the director's response, they may submit the grievance to the Advocacy Committee chair and provide a copy to the assigned DHRM Agency Partner within 10 working days of receiving the initial response.
- The chair shall review all documentation, may meet with the employee or interested parties, and issue a written decision within 15 working days. A copy of the response should be provided to DHRM for retention in the grievance file.
- The Chair's decision represents the final determination within the office.

## **Step 3 – Optional External Review**

- If the grievance concerns matters covered under state employment laws or DHRM rules, the employee may request review or appeal through DHRM if applicable.

## **ADMINISTRATION OF GRIEVANCES**

- The Director shall oversee the administration of grievance procedures and ensure compliance with applicable rules and laws.
- The Advocacy Committee shall be informed of any significant personnel issues that may affect office operations but shall not participate in individual grievance determinations unless a submission rises to the level of a secondary review.
- The office may utilize DHRM for assistance in managing or documenting grievance processes.

## **CONFIDENTIALITY**

- All grievance records, responses, and supporting documentation shall be maintained in confidential files by the Director, in coordination with DHRM.
- Grievance materials are considered non-public private records under Utah Code § 63G-2-302(2)(a).
- Information regarding grievances shall only be shared with individuals directly involved in the process or as required by law.

## **RETALIATION PROHIBITED**

- Employees who file a grievance in good faith are protected from retaliation under state and federal law.

- Any act of retaliation will be subject to disciplinary action, up to and including termination.

## **AT-WILL EMPLOYMENT**

- Employees of the Land Trusts Protection and Advocacy Office are at-will employees.
- The existence of this grievance procedure does not alter the at-will employment relationship.

## **RECORD KEEPING AND REPORTING**

- The Director, in coordination with DHRM, shall ensure that all grievances and resolutions are documented and retained in accordance with the State Records Retention Schedule.
- Summary data may be reported annually to the Advocacy Committee in aggregate form, without disclosing personal or confidential information.

## Land Trusts Protection and Advocacy Office: Employee Grievance Form

### Employee Information

**Employee Name:** \_\_\_\_\_

**Position Title:** \_\_\_\_\_

**Work Phone / Email:** \_\_\_\_\_

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### Grievance Description

#### **1. Date of Incident/Decision Giving Rise to Grievance:**

#### **2. Description of the Issue:**

(Provide a detailed account of the issue, including dates, times, locations, and persons involved. Attach additional pages if necessary.)

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#### **3. Policy, Practice, or Situation Believed to Be Unfair or Improper:**

(Identify the specific policy, rule, or condition you believe was violated or applied unfairly.)

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#### **4. Steps Taken to Resolve the Issue Informally (if any):**

(Describe any attempts to discuss or resolve the matter prior to filing this grievance.)

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### Requested Resolution

(Describe the outcome or remedy you are seeking to resolve this grievance.)

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### Employee Certification

I certify that the information provided in this grievance form is true and complete to the best of my knowledge. I understand that retaliation for submitting a grievance in good faith is prohibited under state law and office policy.

**Employee Signature:** \_\_\_\_\_  
**Date:** \_\_\_\_\_

**Executive Review: Official Response**

(To be completed by the Advocacy Office Director or Committee Chair after reviewing the grievance.)

**Date Received:** \_\_\_\_\_

**Summary of Review and Actions Taken:**

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**Decision / Resolution:**

- Grievance Resolved
- Grievance Denied
- Referred to Advocacy Committee Chair
- Referred to DHRM

**Comments:**

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**Executive Reviewer Name and Title:**

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**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Filing Instructions**

- Submit the completed form to the Advocacy Office Director and provide a copy to the assigned DHRM Agency Partner within 15 working days of the incident/decision giving rise to the grievance.
- If the grievance involves the director, submit the form directly to the Advocacy Committee Chair and provide a copy to the assigned DHRM Agency Partner.
- The office director or committee chair will ensure all grievance forms and related materials are stored in a confidential personnel file at DHRM.

<b>LAND TRUSTS PROTECTION &amp; ADVOCACY OFFICE</b> <b>07.05 INTERAGENCY PROTOCOLS POLICY</b>	
<b>EFFECTIVE DATE:</b> <i>pending</i>	<b>REVISION DATE:</b>
<b>SUMMARY:</b> THE ADVOCACY COMMITTEE ADOPTS THE FOLLOWING POLICIES AND PROCEDURES REGARDING MEETINGS AND PROTOCOLS BETWEEN TRUST AGENCIES.	

## REFERENCES

- [§ 53D-2-203 Land Trusts Protection and Advocacy Office Director](#)

## DEFINITIONS

- **Interagency Protocol:** A written agreement that outlines roles, responsibilities, processes, and expectations for coordination between government agencies.
- **Lead Agency:** The agency designated as primarily responsible for administering a specific function or initiative under a protocol.
- **Participating Agency:** The agency supporting or collaborating with the lead agency under the protocol.
- **Non-Public Information:** Information protected by law including private, controlled, protected records, and records to which access is restricted pursuant to other legal authority.

## PURPOSE

- The purpose of this policy is to establish a clear framework for developing interagency protocols and meetings between the Advocacy Office and other trust agencies to promote effective coordination, information sharing, accountability, and collaboration that is lawful, efficient, transparent, and aligned with each agency's statutory authority.

## POLICY

- **Scope:** This policy applies to all Advocacy Committee members and Advocacy Office employees who participate in joint activities, shared processes, or coordinated functions with other trust agencies.
- **Authority:** This policy is established pursuant to applicable state laws, administrative rules, and governing statutes that authorize interagency cooperation, including but not limited to Utah Code 53D-2-203(5)
- **Interagency Meetings:** The director of the Advocacy Office shall establish a cadence of regular meetings with the directors of other trust agencies to share information, address matters impacting the beneficiaries rights and interests, and to establish, revise and review protocols as needed.
- **Interagency Protocols:** It is the policy of the Advocacy Office to collaborate through formally documented interagency protocols when shared responsibilities

or overlapping authority exist. All protocols shall:

- Respect each agency's independent statutory authority
- Clearly define roles and responsibilities
- Promote efficiency and consistency
- Protect confidential and protected information
- Uphold the classification of any government record shared between agencies as outlined in §63G-2-206
- Be documented, reviewed, and updated as necessary

- **Protocols may be developed for the following activities and processes:**
  - Beneficiary communication
  - distribution notifications
  - legislative affairs
  - media relations
  - public outreach
  - dispute mediation and resolution
  - information sharing and confidentiality
  - other topics that may emerge in the trust system
- **Protocols may include the following elements:**
  1. **Purpose and Objectives**
    - Description of the shared issue, program, or function
    - Intended outcomes of the collaboration
  2. **Roles and Responsibilities**
    - Identification of lead and participating agency roles
    - Specific duties assigned to each agency
    - Decision-making authority and communication pathways
  3. **Communication and Coordination**
    - Designated points of contact for each agency
    - Procedures for regular coordination meetings
    - Protocols for issue resolution
  4. **Information Sharing**
    - Types of information to be shared
    - Legal limitations and confidentiality requirements
    - Data security and record retention requirements
  5. **Resource Commitments**
    - Staffing or funding if applicable
  6. **Compliance and Accountability**
    - Monitoring and reporting expectations