



WHATSAPP AND TEAMS MESSAGING PROTOCOL YEOVIL TOWN COUNCIL



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1. Purpose

- 1.1. This Protocol establishes the arrangements for the use of Microsoft Teams and WhatsApp by employees of Yeovil Town Council. Its purpose is to support effective communication and service delivery while ensuring appropriate governance, management oversight, information security and professional standards.
- 1.2. The Council's preferred platform for internal business communication is Microsoft Teams. WhatsApp is permitted only where there is a legitimate operational need and its use is authorised in accordance with this Protocol.

2. Scope

- 2.1. This Protocol applies to all Council employees, workers, contractors, agency staff and casual workers.
- 2.2. Councillors shall not be members of operational staff WhatsApp groups established under this Protocol except where approved by the Chief Executive / Town Clerk for a specific operational purpose.

3. Communication Principles

- 3.1. Microsoft Teams is the Council's primary and preferred platform for internal business communication and collaboration.
- 3.2. Employees who have access to a Council Microsoft 365 account should use Teams for work-related communication wherever reasonably practicable.
- 3.3. The Council recognises that some operational services rely on casual or shift-based workers who do not have access to a Council device or Microsoft 365 account. In these circumstances, authorised WhatsApp groups may be used where there is a clear operational requirement.

4. Use of Microsoft Teams

- 4.1. Microsoft Teams should be used for:
 - Day-to-day officer communications.
 - Team discussions and collaboration.
 - File sharing and document management.
 - Meetings and video calls.
 - Communications requiring an auditable Council record.
 - Project and service management discussions.

5. Use of WhatsApp

5.1. WhatsApp may be used where:

- Staff do not have access to Microsoft Teams.
- Staff do not have a Microsoft 365 account.
- Immediate operational communication is required.
- The communication relates to service delivery or staffing arrangements.
- The purpose cannot reasonably be achieved through Council systems.

5.2. Examples include:

- Shift changes and rota arrangements.
- Short-notice sickness and absence cover.
- Casual staffing arrangements.
- Event staffing and venue operations.
- Operational updates requiring immediate attention, including out of hours incident management.
- Routine handovers between operational staff.

5.3. The Council recognises that WhatsApp may be accessed through personal devices. Employees using personal devices for authorised Council business must comply with this Protocol and take reasonable steps to protect Council information.

6. Restrictions on WhatsApp Use

6.1. WhatsApp must only be used for approved operational communication. It must not be used for matters that require formal handling, confidential management, official record keeping or wider Council oversight.

6.2. The following shall not be communicated through Whatsapp:

- Formal decision-making, approvals or instructions that should be recorded through Council systems.
- Disciplinary, grievance, capability, absence management or other formal employment matters.
- Sensitive personal data, confidential information or safeguarding information unless specifically authorised, necessary and handled in accordance with Council policy.
- Matters that are contentious, complex or likely to require a formal audit trail.
- Personal, social or non-work-related discussions within work-related Council groups.
- Offensive, abusive, bullying, harassing, discriminatory, defamatory, threatening or otherwise inappropriate content.
- Gossip, speculation, criticism of colleagues or discussion of individual performance, conduct or personal circumstances outside formal management processes.

- Sharing screenshots, forwarding messages or copying content from Council groups without a legitimate business reason and appropriate authority.
 - Using private, informal or unofficial groups to avoid Council oversight, management processes, information governance or record keeping.
- 6.3. If a matter becomes formal, sensitive, contentious or requires a record of decision, communication must be transferred to email, Microsoft Teams or another approved Council system.

7. How Communications Should Operate

- 7.1. Communications on Microsoft Teams and approved WhatsApp groups must be professional, purposeful and proportionate. Messages should be limited to the relevant service, team, rota, event or operational matter and should be written in a way that could be appropriately disclosed or reviewed if required.

Employees must:

- Use Microsoft Teams wherever it is available and suitable for routine Council business.
- Use WhatsApp only for the specific approved purpose of the group.
- Keep messages factual, concise, respectful and work-related.
- Share information only with those who need it for an authorised Council purpose.
- Avoid sending non-urgent messages outside normal working hours unless there is an operational need.
- Escalate urgent or significant operational issues through the agreed management route where a message alone is not sufficient.
- Ensure that any decision, instruction or information that needs to be retained is recorded in an approved Council system.

8. Approval of WhatsApp Groups

- 8.1. All work-related WhatsApp groups must:
- Have a clearly defined operational purpose.
 - Be approved by the relevant Director or the Chief Executive.
 - Include an appropriate manager responsible for oversight.
 - Be recorded on the Council's WhatsApp Register.
- 8.2. For the purposes of this Protocol, the responsible manager is the manager with operational responsibility for the relevant service area, activity or group using WhatsApp. The responsible manager is accountable for ensuring that the group has an approved business purpose, that membership is appropriate, that use of the group is monitored, and that any required Council records are retained in an approved Council system.
- 8.3. No employee may establish a work-related WhatsApp group for Council business without approval.

9. Existing WhatsApp Groups

- 9.1. All existing work-related WhatsApp groups shall be reviewed following the adoption of this Protocol.
- 9.2. Any existing group which has not been formally approved shall be reviewed by the relevant Director.
- 9.3. Where all members of a group have access to Microsoft Teams and there is no demonstrable operational need for WhatsApp, the group shall be discontinued and all work-related communications shall revert to Microsoft Teams.
- 9.4. Only groups that have a clear operational justification, such as supporting employees who do not have access to Microsoft 365 accounts or Council devices, may continue following approval and inclusion on the Council's WhatsApp Register.
- 9.5. Employees must not use unofficial WhatsApp groups as an alternative to Microsoft Teams for routine Council business where Teams is available and suitable for that purpose.
- 9.6. The Chief Executive or relevant Director may require any WhatsApp group to be discontinued where its continued use is no longer justified, compliant or operationally necessary.

10. WhatsApp Register

- 10.1. The Council shall maintain a register of approved work-related WhatsApp groups.
- 10.2. The register shall record:
 - Group name.
 - Purpose.
 - Service area.
 - Responsible manager.
 - Group administrator(s).
 - Date established.
 - Date of most recent review.
- 10.3. The relevant Director shall be responsible for ensuring information remains accurate and up to date.
- 10.4. The WhatsApp Register shall be reviewed annually to ensure all approved groups remain necessary and compliant with this Protocol.

11. Management Oversight

- 11.1. Managers responsible for approved WhatsApp groups shall:
 - Ensure the group continues to serve a legitimate business purpose.
 - Review membership periodically.
 - Remove individuals who no longer require access.

- Address any inappropriate use of the platform.
- Ensure compliance with this Protocol.

11.2. Group administrators shall:

- Maintain group membership records.
- Remove former employees or individuals who no longer require access where authorised to do so.
- Ensure membership remains appropriate for the group's approved purpose.
- Refer any concerns regarding inappropriate use or conduct to the responsible manager.

11.3. Removal from approved WhatsApp groups shall form part of the Council's employee leaving procedures.

11.4. The Council reserves the right to review work-related WhatsApp communications where necessary for management, disciplinary, legal, safeguarding, audit or information governance purposes.

12. Professional Conduct

12.1. The standards required by the Council's employment policies apply equally to communications conducted via Teams and WhatsApp.

12.2. Employees must:

- Communicate professionally and respectfully.
- Use communication channels appropriately.
- Avoid offensive, discriminatory or inappropriate content.
- Respect colleagues' working hours wherever practicable.

13. Information Governance and Data Protection

13.1. Communications relating to Council business may constitute Council records.

13.2. Employees must:

- Handle information in accordance with data protection legislation and Council policies.
- Take reasonable steps to protect confidential information.
- Ensure personal data is shared only where necessary and authorised.
- Report any data breach or security concern immediately.
- Ensure that significant decisions, instructions, approvals or operational matters communicated through WhatsApp are transferred to and retained within an approved Council system.
- Be aware that work-related communications conducted through Microsoft Teams or WhatsApp may be subject to disclosure under Freedom of Information and Data Protection legislation, legal proceedings, audit requirements or other statutory obligations.

- 13.3. The responsible manager shall ensure that any records requiring retention are transferred to an approved Council system in accordance with the Council's records management arrangements.
- 13.4. Employees using personal devices for Council business remain responsible for ensuring that Council information held on those devices can be accessed, retained or disclosed where required by law, policy, audit or legal process.

14. Security

- 14.1. Employees using Teams or WhatsApp for Council business must:
- Secure devices using passwords, PINs or biometric authentication.
 - Keep devices and applications updated.
 - Report lost or stolen devices promptly.
 - Take reasonable steps to prevent unauthorised access to Council information.

15. Monitoring and Review

- 15.1. The Chief Executive shall keep this Protocol under review and may amend it as necessary to reflect operational, legal or technological developments.
- 15.2. Approved WhatsApp groups shall be reviewed at least annually by the responsible manager.

16. Responsibilities

- 16.1. The Chief Executive shall keep this Protocol under review and may recommend amendments where necessary to reflect operational, legal or technological developments.
- 16.2. Directors and managers are responsible for authorising, monitoring and reviewing WhatsApp groups within their service areas.
- 16.3. All employees are responsible for complying with this Protocol.

17. Monitoring and Review

- 17.1. The Council will monitor the effectiveness of this Policy and any associated procedures.
- 17.2. This Policy will be reviewed every five years or sooner where legislative, technological or organisational changes require amendment.

Yeovil Town Council
29th September 2026

To be reviewed: September 2031