

The Public Sector Guide to Social Media Strategy and Policy 2016 Edition



Use social media with confidence.

This guide contains practical steps that will help public sector agencies and departments develop a social media strategy and policy to gain maximum value from social media efforts. It also outlines some smart records retention practices—so you'll be better prepared to respond to open records requests or other e-discovery needs when they arise.





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Determine Your Social Media Strategy



Social media can greatly improve communication, deliver constituent services, help optimize processes, and aid response to emergencies within your community. It can also allow public agency employees to be more accountable, transparent, and open. Along with the benefits, comes increased awareness of security, privacy, and records management on social media.

A solid social media strategy may allow your public agency and departments to connect with the community in an easy, time- and cost-effective manner that most people can access. The strategy doesn't need to be complicated. Whether this is your first time developing a social media strategy, or if you already have one in place, remember to keep it simple. Here are a few things to consider while developing a new or rounding-out your existing strategy:

- Current use and social media tool capabilities
- Internal policies and monitoring
- External requirements for preserving records and responding to information requests
- Understanding the risks

WHY DO YOU WANT TO USE SOCIAL MEDIA?

Understanding the intent of your social media profile can help you keep your agency's voice, presence, and content consistent across platforms. You may want to use social media to:

- ✓ Bring awareness on a particular issue or initiative in the community
- ✓ Improve community and media relations
- ✓ Increase the reach of standard emergency communication methods

Understand Your Audience

Once you've outlined your social media objectives, move on to define your specific target audience. If possible, narrow your audience to clarify by gender, generation, socio-economic group, or by business type, size, or location, where applicable.

These details will guide you as you create social content to share, reach out to influencers, identify relevant social networks and increase your followers and connections.

74%
of ONLINE
ADULTS
use SOCIAL
NETWORKING
SITES'

38 years old:
age of the average
Facebook user

39 years old:
age of the average
Twitter user

What are the right channels for your department?

Your objectives and audience will help you determine which social media platforms are best suited to your goals. While some networks are great for broadcasting your message to millions, they might not be the best for your objectives. Align your social networks with your agency's goals to deliver the desired results.

1 Determine Your Social Media Strategy

Some of the most popular platforms to consider in your social media strategy include:



LinkedIn

LinkedIn has a firm grip on the business professional social network market. Its growing user base tends to be affluent, educated, and influential.

VALUE:

LinkedIn can help you spread the word about your agency, communicate with other public sector agencies, and help form business relationships.



Facebook

71% of online users in the U.S. are active on Facebook.¹

VALUE:

Facebook can help your agency build its visibility and connect with constituents, citizens, or clients.

The FASTEST-GROWING DEMOGRAPHIC on Twitter IS THE 55 to 64 YEAR AGE BRACKET²



Twitter

City dwellers are significantly more likely than rural residents to be on Twitter. The fastest-growing demographic on Twitter is the 55-64 year age bracket.²

VALUE:

Twitter can help your agency get the word out when it is hosting an event or attending a conference—and lets you share those moments immediately. Your agency can share commentary on current news or encourage people to engage in an event or take action for a specific cause. Twitter is one of the fastest-growing networks for business.



YouTube

60% of boomers and 40% of seniors say watching online video on sites like YouTube has become an important part of their day, and 75% of boomers and 68% of seniors report taking some sort of action after viewing a video.³

VALUE:

Video is a highly effective medium that can help an agency easily publish video content to reach a large audience.

75% of boomers | **68%** of seniors
REPORT TAKING SOME SORT OF ACTION AFTER *viewing a video*³



Instagram

Though it's owned by Facebook, Instagram is a mobile app with distinct demographics. The photo and video-sharing social media network has 200 million users, with an average of 60 million photos shared daily.

VALUE:

Instagram can help an agency build its visibility. It's great to use if you are hosting or attending an event. People often take photos of themselves with colleagues or peers at an event, and include the hashtag associated with it to gain additional visibility and credibility as a thought leader.

Who will create and share your message?



Content *creation* is one of the most important communication tactics to help your agency be noticed online, and includes original information that you share through website updates, blogging, photography, videos, online commentary, and social media.

Creating original content at all times is an unrealistic goal. Many social media experts suggest a ratio of 30 – 40% original content when posting on social media, and 60 – 70% comprised of content sharing and interaction.

Tip: Be mindful that all content and links—whether original or shared—are appropriate and align with your agency guidelines.

To support records compliance, social media content must be properly archived and producible. To ensure the authenticity of the record, the associated metadata must be captured. However, it is important to note that printing electronic records removes the metadata that establishes the authenticity of the communication.

All the content you create and post on social media sites is considered public record, regardless of:

-  Format used to communicate: Email, websites, text messages, and blog posts
-  Device type: PCs, laptops, smartphones, and tablets
-  Where it's generated: Your office, offsite, conferences, and events



TIP: Consider these questions when creating your social media strategy

Your department is associated with an important mission statement and ongoing relationships with the public, so your social media efforts must positively reflect that vision. Whether you create your own social content, or work with an external resource, compliance with public sector laws and regulations is required. Use these questions as a guide to create the right strategy:

Employee access:

Who will provide content and updates?

Training:

Who is responsible for training employees to create and update content?

Acceptable use:

What types of content can be shared? Is there a review or vetting process before posting content to ensure it's appropriate?

Content:

What is considered appropriate content? What knowledge will you share to highlight your agency's specialty areas and capabilities?

Security:

Is a security policy for social media in place?

Citizen conduct:

How do we respond to inappropriate or negative comments from the community?

Record keeping:

What are the required retention periods? Are essential records identified?

Open records, Freedom of Information Act, and regulatory and e-discovery:

Are you fully aware of all the legal requirements, open-records laws, guidelines, and regulations for social media in accordance with your agency?

1 Determine Your Social Media Strategy



How will you interact?

Keep your audience in mind. Will your agency's voice be formal or informal? Your choice of platform may help you make this decision. Facebook is often visual and more casual in nature, whereas LinkedIn posts are centered on business or professional development topics. Pick an interaction style that best suits the goals of your department, and the needs of your voters, constituents, citizens, or clients. Social media is social; make sure your voice is authentic and credible.



How will you adjust course?

Preparation for the unexpected is vital. Build flexibility into your social media strategy to help you shift focus in case of an unexpected event or news that needs to be communicated immediately, and outside of your established social media calendar.

And Finally...

Once you have your strategy defined, share it with others in your department to help them gain confidence when engaging on social media. You'll also want to review your social media strategy frequently to make adjustments and chart progress toward achieving your related organizational goals.

Also, don't forget to document your social media success. Social media is just one segment of your overall communications strategy, so it should fit into your broader plan.

Start with the finish line in mind when you create your social media strategy. Give yourself all the advantages of social media to create online interaction that leads to a positive relationship with your audience.

2 Develop Your Social Media Policy



The follow-up to determining your agency's social media strategy is to develop clear documentation that outlines the rules of social media interaction within the organization, and how your social media content will be retained—so you're prepared to meet open records requests, Freedom of Information Act requests, and e-discovery and litigation events.

A sound social media policy will take its lead from your social media strategy. Collaborate across different departments in your agency while building your social media policy, especially your archivists (records management) and legal team.

QUESTIONS TO ASK WHEN DEVELOPING YOUR POLICY

Who's doing the talking?

Your social media policy should identify who is authorized to represent the agency in a social media capacity. Are certain individuals assigned to specific topics of conversation? Is someone approving posts before they're shared publicly? A social media policy should clearly state every detail, from territories and parameters to password controls and security measures. Also, define the particulars of your social media training program directly within the policy to ensure a consistent agency voice and action across social media.

Who's doing the listening?

The flip side of engagement is observation. Pay attention to the digital channels your agency uses. Appoint someone to monitor the outbound activity of your agency and online chatter about the organization. Valuable feedback can help you adjust and redirect your social media path when needed.

- ✓ Many people view social media as a one-way communication vehicle—a broadcast medium meant to share news, and post opinions and ideas. They miss out on the opportunities to research trends and actively engage with clients or other influencers through listening. Many thoughts, opinions, and dialogue are transmitted through social media channels. If you're not being a cyber-sleuth, you're leaving one of the most valuable pieces of social networking uncovered. Do some digging, and it will help you form your own communication and engage your audience through social media.
- ✓ Pay attention to the two-way communication in the social media space provides valuable information and feedback. It's worth dedicating time to this effort if you can. Learn how to set up your listening channel on the next page.





SET UP YOUR LISTENING CHANNEL

To develop a listening channel, here are some tools to get you started. Create a separate email address (ex: listen@abcagency.gov) to help you sort through all of the email updates you'll receive.

- ✓ Use **GOOGLE ALERTS** to stay on top of news in your area or issue/topic. Track your agency name and the names of other related agencies or influencers.
- ✓ **NEWSLE** is a service that helps you track when your agency is mentioned in newsletters, articles, etc.
- ✓ **TWILERT** is a Google Alerts version geared for Twitter.
- ✓ **LINKEDIN SIGNAL** allows you to search the updates of everyone in your network using specific phrases or words.
- ✓ **TWITTER** profile settings provide a simple way for you to be notified when someone tweets your agency name or an official's name. Check the settings area under mobile and email. Facebook has a similar function.



Where is the conversation happening?

A social media policy is the ideal place to get specific about the digital platforms your agency has elected to use, and should even state if there are any that are prohibited. How often will social activity occur and where will the activity happen? Pinpoint what will be said and to whom. A content plan and approval process based on the goals you defined in your social media strategy plan is a good place to start.

What are the rules of play?

Detail every requirement regarding records retention laws and regulations for your particular department. Pull in legal counsel, human resources, compliance, records-retention officer, records clerk, or other departments to specify the consequences of non-compliance with social media procedures.



What is the difference between official business communication and personal communication?

If agency employees are using social media in a personal capacity, your social media policy should detail rules and procedures regarding conduct on personal accounts, and on official agency accounts. Create policies that address how your social media authors should refer to your agency, job titles, and functions or responsibilities. Provide direction on professional profile pictures and advise if there are review or approval requirements. Because of the depth and breadth of this undertaking, creating a separate guide dedicated to the issue of personal versus business conduct on social media is beneficial.



Who needs to read, review and sign the social media policy?

Have a system in place to distribute your department's social media policy, with specific actions outlined for individuals who need to sign and acknowledge the policy.



What happens when it all goes wrong?

Despite all the best planning, sometimes things go awry. Human beings ultimately drive social media activity. Mistakes, often inadvertent, do happen; sometimes the wrong sentiment is expressed, human emotion creeps into an exchange, or erroneous information is shared. Don't forget to include a plan for the worst-case scenario. Make sure your social media policy has every base covered.



What happens when an employee who uses social media leaves the agency?

Have procedures in place that outline steps to take when an employee or official who uses one of your agency's business social media account leaves or is terminated. Will the account be closed down? Will the account remain open, but with a new password and user name generated? Be as specific as possible.



Make social media 'official business' accounts available for archiving.

If your agency's officials or employees use social media for business communication, it's best practice to archive 'official business' social media communications, and those of your department, in-line with state open records laws, Freedom of Information Act requirements, and e-discovery and legal obligations.

A Final Note

When you've finished putting together your social media policy, you'll have documentation that allows your agency to confidently participate in online engagement and public outreach via social media. Using precise language based on your strategy and procedures will help your agency operate within the boundaries of various government records requirements, and allow you to respond to any request for social media records during an investigation, e-discovery, or litigation event.

Also, remember to review your social media policy over time, to keep up with the needs of your agency, changing technology, and new regulations.



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Intelligent Archiving



Technology should make life easier for your compliance team, and help your department follow the regulatory rules.

Safe, secure and automated capture of social media records is the goal, but some archiving features can make the difference between a compliance team that's stressed by social media, and one that supports social media use because they have an effective way to manage and supervise the content.

An intelligent archive captures information the right way, retaining proper context for each content type, making it possible to search for social media content instantly across many different social platforms.

★ An intelligent archive includes:

Smart ingestion

✓ **Real-time capture.** This eliminates the possibility of your social media data being deleted. If an employee posts an update to Facebook but later removes it, you'll see the original post, *plus* the activity log that shows who deleted it.



✓ **Dynamic archiving of social media content.** Treating social media archiving like email archiving won't work well. Social media posts include more than static words. Social media content is constantly updated, changed, or deleted, and can include pictures, links, and so on. All of these have to be captured in an archive to have a complete record of communication. Be cautious of solutions that 'flatten' social media and strip it of its original features and unique context, making it hard for a compliance team to know what they're looking at during content review. For more information about the perils of flattening social media, see 'Archiving New Content Types Requires Outside the Inbox Thinking.'

Fast, efficient search



- ✓ **Fast.** Your department should be able to run searches on their own and get the results back within seconds, without the need to get help from IT or the archiving vendor.
- ✓ **Universal.** You don't need to have multiple archiving tools for different content types (one for email, one for social, etc.). A better option is to go with a single comprehensive archiving solution that archives all of your content types. This way, you can search quickly across people, keywords, and content types at the same time to return universal search results, with no stone left unturned.



The best solution
IS ONE THAT ARCHIVES
**ALL OF YOUR
CONTENT TYPES**
WITHIN THE *same tool*

- ✓ **Granular.** Your searches will be most effective if you can narrow them down. Look for the ability to search by person, group, date range, keywords and more. Also, consider a solution that will allow you to apply exclusions, add proximity search and a variety of other criteria to get to the exact information needed.

Automation



- ✓ **Policy management.** Smart policies that scan content from your department's social media accounts for specific information as the data enters the archive can help a compliance team become ultra-efficient and more diligent with social media supervision. Policies can be set up to help you filter out 'white noise' – aka the majority of social media content that doesn't need to be reviewed. With fewer irrelevant messages to review, greater attention can be given to the truly risky messages in a reviewer's daily queue.
- ✓ **Preset templates.** Some archiving vendors have in-depth industry expertise and have developed lexicons within a list of preset policy templates. These templates can help you quickly implement policies, and address some of the most common supervision challenges so you can identify real risk.



YOUR DEPARTMENT CAN BECOME
ultra-efficient AND
MORE DILIGENT
WITH *Smart*
POLICY MANAGEMENT

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Additional Considerations



A vendor should have deep industry knowledge, high-touch support, and help your agency during an audit or investigation. The vendor must understand your exact compliance needs and have a history of supporting agencies like yours through regulatory and e-discovery events. The solution should also provide:

- ✔ **A flexible team-based review structure.** Archiving should support the way your compliance team works, and allow you to assign specific supervision roles to individuals or groups and grant the appropriate level of access. The ability to create queues allows individuals to see the messages they're responsible for reviewing daily and their progress in the queue, so they can prioritize to get the job done.
- ✔ **Forensically sound audit trail.** An audit trail captures data on every visual inspection of a social media post in the archive. All archived social media activities must be available for production on-demand, and show a full history of social media posts, corresponding compliance reviews and remediation actions taken. Administrator activity must be logged and quantifiable, so your agency can show regulators enforcement of your social media policy. This is critical in the event of litigation, regulatory exam, or an e-discovery event.
- ✔ **Legal holds.** The ability to quickly and easily place legal holds allows you to meet preservation requirements and show defensible practices during an e-discovery event.

- ✔ **Comprehensive reporting.** The ability to run reports on the data in your agency's social media archive, whenever needed is invaluable. Reports help you understand where you might need to conduct further analysis for improved risk mitigation.
- ✔ **Retention policies.** No need to store all this social data forever. Look for a tool that lets you determine how long it should retain the information before deleting it. A good vendor will have expertise in your industry and help ensure that the retention periods you set are in accordance with regulations.



Social media is likely an important part of your agency's day-to-day business. You want technology to help grow your presence while effectively supervising and retaining social media records—without adding more complexity to your compliance team's current workload.

When you find the right social media archiving solution, it can help you overcome the toughest content supervision problems.

Should you choose cloud technology?

Compared to an on-premise solution with lots of software and hardware to manage, a cloud solution can have a lower cost of ownership, more predictable costs, faster deployment, and fewer disruptions in service. A cloud solution also frees up your department's IT team to work on more important projects—instead of monitoring and maintaining archiving infrastructure.

Consider a cloud service for its overall quality, service records, support, and ability to provide the specific supervision and discovery tools your agency needs. Technical considerations include:

- ✓ **IT EXPERTISE.** Does the vendor have IT staff that can manage the archiving process for your agency? Can the vendor manage all, or some of the process of implementing and maintaining the solution? Is the vendor's IT team familiar with up-to-date data security practices, so you can protect against data leaks? Does the vendor have world-class client support?
- ✓ **OVERALL COST.** How much will it cost to implement and maintain the archiving solution, on an immediate and long-term basis?
- ✓ **FLEXIBILITY.** When your agency adopts new social media platforms and technologies, will the vendor be able to archive them? Are they innovative and knowledgeable about the newest forms of digital content that may require archiving and supervision? Also, can the vendor build custom solutions for your department if an immediate solution isn't available, or integrate with one using a standardized developers API?
- ✓ **REPUTATION.** How long has the vendor been in the archiving business overall? What is their client satisfaction rate? What type and size of businesses do they serve? Does they have special technology certificates or industry distinctions and awards?
- ✓ **DATA CENTER LOCATION AND OPTIONS.** Does the vendor have multiple data centers for redundancy and disaster recovery in an emergency? Where will your data be stored? What are the specifications of the data centers? Does the vendor comply with the highest industry standards? Are their data centers physically secure, with intrusion detection and malware filtering in place?
- ✓ **BUSINESS CONTINUITY AND DISASTER RECOVERY.** Does the vendor have multiple telecommunications links for each data center? Are full, nightly backups of your data performed daily? Does the vendor have back-up generators in its data centers?
- ✓ **SCALABILITY.** Can the vendor scale their archiving infrastructure rapidly to meet your future archiving requirements?
- ✓ **SUPPORT.** Is 24/7 technical support available? Is live support available during business hours? Are there phone/email/online chat options available? How will your compliance team be supported by the vendor when there are questions?
- ✓ **UPTIME RELIABILITY.** How much system downtime have clients experienced during the past month, six months, or year? Is there a money-back guarantee offered if the cloud service is unavailable longer than a Service Level Agreement (SLA) specifies?
- ✓ **PROFESSIONAL SERVICES.** Does the vendor offer consulting services with its archiving solution? Does the vendor understand your industry and business type? Can they educate you on best practices and how to implement them? Will they help you migrate older content to the cloud archive? Can the vendor respond to your future archiving needs?



★ Why Smarsh?

The Archiving Platform™ from Smarsh is a leading, cloud-based, comprehensive archive platform supporting a broad range of content types, including email, instant and text messages, web, video and social media. Core features include immutable retention of all archived content in an indexed and search-ready state, policies, cases and admin/reporting functions. Core features can be extended and enhanced with specialized workflow add-on modules for message supervision/review, discovery, and personal access to archived email from any device, including mobile ones.



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Smarsh delivers cloud-based archiving solutions for the information-driven enterprise. Its centralized platform provides a unified compliance and e-discovery workflow across the entire range of digital communications, including email, public and enterprise social media, websites, instant messaging and mobile messaging. Founded in 2001, Smarsh helps more than 20,000 organizations meet regulatory compliance, e-discovery and record retention requirements. The company is headquartered in Portland, Ore. with offices in New York, Atlanta, Boston, Los Angeles and London.

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