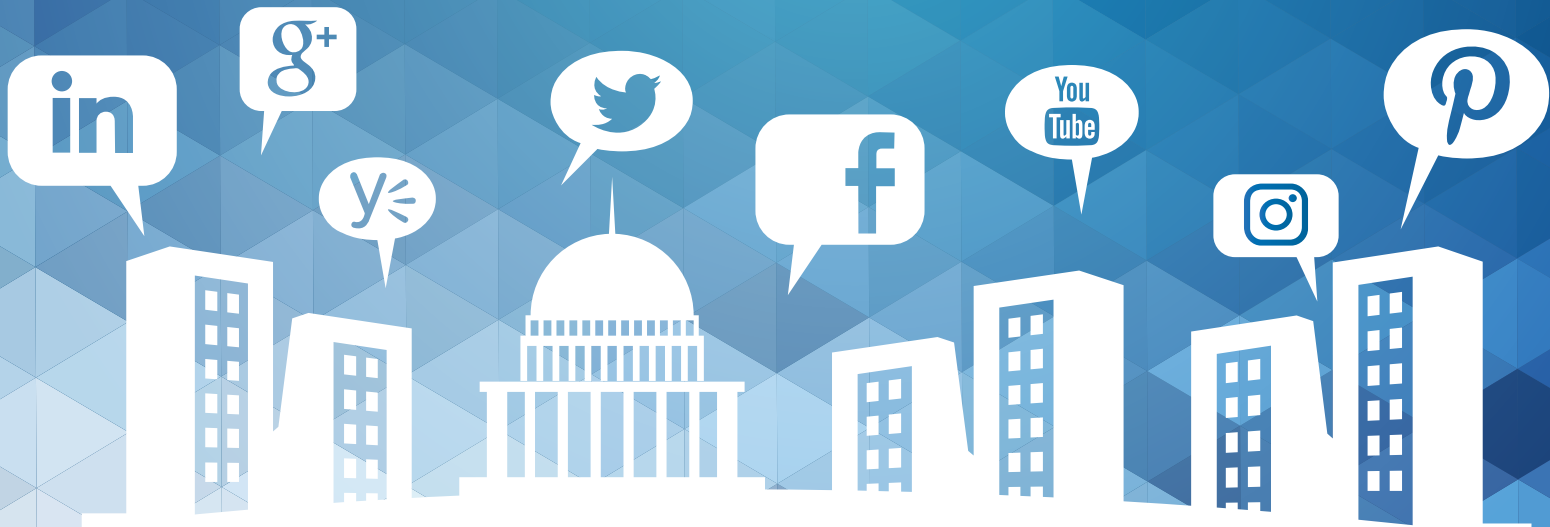


The Public Sector Guide to **Social Media Strategy** and Policy



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 needs when they arise.



1

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 sector organization employees to be more accountable, transparent, and open. Along with the benefits comes increased awareness of security, privacy, and records management challenges on social media.

A solid social media strategy can help your organization and departments 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 you already have one in place, remember to keep it simple. Here are a few things to consider while developing or rounding-out your strategy:

- Available social media tools and capabilities
- Internal policies and approvals
- External requirements for preserving records and responding to information requests
- Your organization's overall objectives and the needs of the community

DETERMINE WHY YOU WANT TO USE SOCIAL MEDIA

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

- ✓ Raise awareness about 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.

83%
of AMERICANS
have a
**SOCIAL MEDIA
ACCOUNT²**


79% of online
Americans now
use **Facebook**

29% of online
adults use **Twitter**

What are the right channels for your organization?


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 organization's goals to deliver the desired results.

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

 **Facebook**


VALUE: Facebook can help your organization build its visibility and connect with your community through longer stories and photos. Facebook Live allows you to engage your audience through interactive video for a more personal feel. Check out our blog, [Facebook Live: Best Practices for Government](#) to learn more tips and tricks for using this feature.

- Facebook is the most-used app
- Facebook remains the most-used social media among all ages

 **Twitter**

VALUE: Twitter can help your organization immediately reach large audiences to share commentary on current news, participate in an event, or take action for a community-related cause.


- 83% of Twitter users are active on mobile
- 40% of people use Twitter to be alerted to breaking news

 **YouTube**

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


- Almost one-third of all people on the Internet are YouTube users
- You can navigate YouTube in a total of 76 different languages, covering 95% of the Internet population

YOUTUBE REACHES MORE
18-49
YEAR OLDS THAN *any* CABLE
NETWORK IN THE U.S.

 **Instagram**

VALUE: Instagram is great to use when you host or attend an event. Include the hashtag associated with it to gain additional visibility and credibility as a thought leader.

- Instagram has 400 million monthly active users
- The platform has an average of 80 million photos shared daily

 **LinkedIn**

VALUE: LinkedIn can help you spread the word about your organization, communicate with other public sector groups, and form business relationships. Because of its professional angle, LinkedIn can also be used as a recruitment tool for your organization.

- 40 million students and recent college graduates are LinkedIn users
- Military and veteran members are among the most active

Who will create and share your message?

Content *creation* is one of the most important communication tactics to help your organization 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 an 80/20 mix to keep your audience engaged - where 80 percent of your shared content comes from other sources, and 20 percent is original content created by your organization.


By following this rule, you can curate the content your audience finds relevant and interesting. As a result, they are more likely to pay attention when you create organization-focused posts.


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

Focus on content that speaks to the needs and interests of your community. Content can comprise material from partner organizations that are active within your community and sister groups in other locations.

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 social media efforts must positively reflect your organization’s mission statement and ongoing relationships with the public. 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:

Roles and resources:

Do you have the available resources to source, create, post content, and monitor social media activity?

Training:

Who is responsible for training employees on social media use and internal policies?

Acceptable use:

What types of content can be shared? What will you share to highlight your organization and engage your community? Is there a review or vetting process for posting content to ensure it’s appropriate?

Connecting:

What are the right platforms for your organization? How frequently will you post content?

Citizen conduct:

How will you respond to inappropriate or negative comments from the community?

Intent:

What is your overall social media goal? How will you measure success?

Open records, Freedom of Information Act, and regulatory and eDiscovery:

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



How will you interact?

Keep your audience in mind. Will your organization's voice be formal or informal?

Your choice of platform may help you make this decision. Generally speaking, to create a successful presence, you should adopt at least two of the platforms your audience uses most. Pick an interaction style that best suits your goals and the needs of your community. Social media is *social*. Remember to engage your followers; talk to them, *about* them.



How will you adjust course?

Preparation for the unexpected is vital. Build flexibility into your social media strategy in case an unplanned event or news occurs. Consult with management and other stakeholders to develop a plan that includes who to contact, roles and responsibilities, and the specific information you can communicate to followers, based on the type of event.

Once your strategy is defined, share it with your organization 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 interactions that lead to a positive relationship with your community.

2 Develop Your Social Media Policy



After determining your social media strategy, develop a documented policy that outlines the rules of social media interaction between your organization and the public, consequences of violating the policy, and how your social media content will be retained.

Collaborate with different departments while building your social media policy, especially your records management and legal teams, and anyone who may play a role in responding to open records requests, Freedom of Information Act requests, and eDiscovery and litigation events.

QUESTIONS TO ASK WHEN DEVELOPING YOUR POLICY

Who's doing the talking?

Your policy should identify who is authorized to represent the organization in a social media capacity. Are certain individuals assigned to specific topics of conversation? Does someone approve 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 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 organization uses. Appoint someone to monitor the outbound activity and online chatter about the organization. Valuable feedback can help you adjust and redirect your social media path when needed.

- ✓ If you only view social media as a one-way communication tool to deliver community news, your organization will miss the opportunity to actively listen and engage with the community. Many thoughts, opinions, and dialogue are transmitted through social media channels. If you're not engaging with your community, you're leaving one of the most valuable pieces of social networking uncovered.
- ✓ Foster authentic, two-way communication via social media to help your organization create a culture of engaged followers who are willing to further your message, without you having to ask them.





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 organization name and the names of other related organizations or influencers.
- ✓ **LINKEDIN CONNECTIONS** In The News allows all LinkedIn members to see when their connections are mentioned in the news. Members can also follow companies in the news.
- ✓ **TWILERT** is a Google Alerts version geared for Twitter.
- ✓ **TWITTER** profile settings provide a simple way for you to be notified when someone tweets your organization 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 specify the digital platforms your organization has elected to use, and should even state those 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 provides 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 your 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 employees are using social media in a personal capacity, your policy should detail rules and procedures regarding conduct on personal and business-related accounts. Your policy should also define how your organization and its job titles, functions, and responsibilities must be referred to on social media. Provide direction on professional profile pictures and advise if there are review or approval requirements. Because of the breadth of this portion of your policy, 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 organization'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 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 organization?

Have procedures in place that outline steps to take when an employee with access to your social media accounts leaves the organization. Will the account be closed or will it be reassigned with a new username and password? Be as specific as possible.



Archive your social media accounts.

Be aware of the requirements for retaining records of your communications. Essentially, all electronic communications, including social media, must be captured and archived. For social media, every business-related post, comment, like, share, pin, or tweet you create or receive may be considered a matter of public record.

A Final Note

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

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



3 Intelligent Archiving



Technology should make life easier and help your organization follow the regulatory rules.

To support records compliance, social media content must be properly archived and producible. Safe, secure, and automated capture of social media records is the goal. Archiving can make the difference between an organization that's stressed by social media, and one that supports social media use because it has 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:

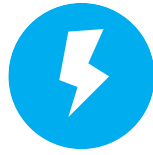
Smart ingestion

✓ **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, and links to articles, videos, and more—all of which must be archived to form a complete record of communication. To ensure authenticity of the record, the associated metadata must be captured. 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 help from IT or the archiving vendor.
- ✓ **Universal.** You don't need to have multiple archiving tools for different content types such as email, social media, and text messaging. A better option is to use a single comprehensive archiving solution that archives all content types. This way, you can quickly and simultaneously search across people, keywords, and content types to return universal results, with no stone left unturned.



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

- ✓ **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, and 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 organization's social media accounts for specific information as the data enters the archive can help your legal and records team become ultra-efficient and more diligent with discovery and production. Policies can help you automate manual processes, such as your retention schedule.



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

4

Additional Considerations



Your vendor should understand your organization's exact recordkeeping needs and have the ability to help during a records request period or a litigious event. The vendor's solution should also provide:

- ✔ **A forensically sound audit trail.** An audit trail captures information on every visual inspection of a social media post in your archive. Your archives should keep all social media posts in their original context—and include all relevant data, such as content revisions and deletions, videos, images, and attachments. All social media activity must be logged and quantifiable so your organization can reproduce comprehensive documentation in response to records requests, eDiscovery, or litigious events.
- ✔ **Legal holds.** The ability to quickly and easily place legal holds allows you to meet preservation requirements and show defensible practices during an eDiscovery event.
- ✔ **Comprehensive reporting.** The ability to run reports on the data in your organization'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 platform 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 the retention periods you set are in accordance with regulations and recordkeeping laws.



Social media is likely an important part of your day-to-day business. Technology can help grow your presence while effectively retaining social media records—without adding more complexity to your current workload.

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

★ Get a Closer Look

Learn more about building a social media strategy and presence for your public sector organization with these resources from Smarsh:

- *Facebook Live: Best Practices for Government* (Blog), www.smarsh.com/blog/live-streaming-best-practices-government/
- *The Government Social Media Survival Guide*, www.smarsh.com/whitepaper/government_survival_guide
- *What Mattered Most to the Public Sector in 2016* (Blog), www.smarsh.com/blog/mattered-public-sector-2016/

★ Why Smarsh?

Smarsh delivers cloud-based archiving solutions for the information-driven enterprise. Its centralized platform provides a unified compliance and eDiscovery 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, eDiscovery and record retention requirements.



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