

COMMONWEALTH OF VIRGINIA



Information Technology Resource Management (ITRM)

ENTERPRISE TECHNICAL

ARCHITECTURE SOCIAL MEDIA

TOPIC REPORT

NETWORKING & TELECOMMUNICATIONS DOMAIN

Virginia Information Technologies Agency (VITA)

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Reviews

- This publication was reviewed and approved by the Manager of the Enterprise Architecture Division.
- Online review was provided for agencies and other interested parties via the VITA Online Review and Comment Application (ORCA).

Publication Version Control

Questions related to this publication should be directed to the Enterprise Architecture Manager at ea@vita.virginia.gov. Enterprise Architecture (EA) notifies Agency Information Technology Resources (AITRs) at all state agencies, institutions and other interested parties of proposed revisions to this document.

This following table contains a history of revisions to this publication.

[ETA Domain/Topic name] Domain/Topic Report: Version History		
Revision	Date	Description
1.0	12/23/2015	Original Topic Report
1.1	03/01/2016	Repaired broken links
2.0	06/12/2019	<i>Reviewed, updated and added to the 2015 topic report</i>

Identifying Changes in this Document

- See the latest entry in the revision table above.
- Vertical lines in the left margin indicate the paragraph has changes or additions. Specific changes in wording are noted using italics and underlines; with italics only indicating new/added language and italics that are underlined indicating language that has changed.

The following examples demonstrate how the reader may identify requirement and recommend practice updates and changes:

EXA-R-01 Example with No Change – The text is the same. The text is the same. The text is the same.

EXA-R-02 Example with Revision – The text is the same. *A wording change, update or clarification is made in this text.*

EXA-R-03 Example of New Text – *This language is new.*

~~**EXA-R-03 Technology Standard Example of Deleted Standard**~~—This standard was rescinded on mm/dd/yyyy.

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Introduction

Background

This report addresses the social media topic of the Enterprise Technical Architecture (ETA) Networking & Telecommunication Domain Report. This report describes technical topics such as wikis, blogs, mash ups, web feeds (such as Really Simple Syndication [RSS] feeds¹), moderated discussion tool platforms, social networking sites and virtual worlds.

As a topic of the Application Domain, this report expands on the principles, recommended practices and requirements presented in the domain report. Requirements and technology product standards introduced in this topic report will be incorporated into the Commonwealth of Virginia (COV) Information Technology Resource Management (ITRM) Enterprise Architecture Standard (EA225- [version]).

In 2018, the Pew Research Center noted that social media outpaces print newspapers in the U.S. as a news source. One-in-five U.S. adults say they often get news via social media, slightly higher than the share who often do so from print newspapers (16%) for the first time since Pew Research Center began asking these questions. In 2017, the portion that got news via social media was about equal to the portion who got news from print newspapers¹.

~~In 2010, the Pew Research Internet and American Life Project's report, "Government Online," found that 31 percent of online adults use social media and other new tools to access government services and information. Forty percent of adults who use the Internet went online in the preceding year to access information about government. With the explosion in the use of social media since 2010, those figures likely are much higher today.~~

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The *Nielsen Total Audience Report*², Q1 2018 reports consumers in 2014 increased their mobile web usage 82 percent over 2013. The Nielsen State of the Media report found that people continue to spend more time on social networks than any other category of website, i.e., 20 percent of their time on personal computers (PCs) and 30 percent of their mobile time is spent on social networks.

As Nielsen reports, on average, U.S. adults are spending over 11 hours a day connected to current and developing media, with almost six hours a day to video

¹ Social media outpaces print newspapers in the U.S. as a news source, Elisa Shearer, <http://www.pewresearch.org/fact-tank/2018/12/10/social-media-outpaces-print-newspapers-in-the-u-s-as-a-news-source/> Retrieved 2018-12-12

² The Nielsen Total Audience Report, Q1 2018, <https://www.nielsen.com/content/dam/corporate/us/en/reports-downloads/2018-reports/q1-2018-total-audience-report.pdf> Retrieved 2018-12-12

alone, social media has fundamentally changed the consumer decision journey. Consumer decisions and behaviors are increasingly driven by the opinions, tastes, and preferences of an exponentially larger pool of friends, peers and influencers.

Definition of Key Terms

All of the [ETA Domain Name] Domain ETA standards and requirements considered to be critical components for implementing the Commonwealth's ETA are included in this report.

The report presents three forms of technical architecture guidance for agencies to consider when planning or when making changes or additions to their information technology:

- "Social media"³ - Though many definitions exist, it is consistently characterized as the collection of Web tools that facilitate collaboration and information sharing. Web-based communities and hosted services include social-networking sites, video and photo sharing sites, wikis, blogs, virtual worlds and other emerging technologies.
- The Virginia Department of Human Resource Management (DHRM) defines social media as a "(f)orm of online communication or publication that allows for multi-directional interaction. Social media includes blogs, wikis, podcasts, social networks, photograph and video hosting websites, crowdsourcing and new technologies as they evolve."⁵

This document presents direction for agencies and staff when planning to adopt or when making changes or additions to their information technology (IT) through:

- Principles – high level, fundamental truths, ideas or concepts that frame and contribute to the understanding of the Enterprise Architecture. They are derived from best practices that have been assessed for appropriateness to the Commonwealth Enterprise Architecture.
- Recommended Practices – statements that provide guidance to agencies in improving cost efficiencies, business value, operations quality, reliability, availability, decision inputs, risk avoidance or other similar value factors. Recommended practices are optional.
- Requirements – statements that provide mandatory Enterprise Architecture direction. All agencies must follow requirements presented in this report.

Glossary

As appropriate, terms and definitions used in this document can be found in the COV ITRM IT Glossary. The COV ITRM IT Glossary may be referenced on the ITRM Policies, Standards and Guidelines Web page at <https://www.vita.virginia.gov/it-governance/itrm-policies-standards/>

Agency Exception Requests

³ Use of Electronic Communications and Social Media (DHRM Policy 1.75), <http://www.dhrm.virginia.gov/mwg-internal/de5fs23hu73ds/progress?id=QtUNcavrYJwHQIU9RNUI3mXEbYpWuZbw3sGRduOsl3s,&dl> 2019-05-18

Agencies that want to deviate from the requirements and/or technology standards specified in COV ITRM Standards may request an exception using the *Enterprise Architecture Change/Exception Request Form*. All exceptions must be approved prior to the agency pursuing procurements, deployments or development activities related to technologies that are not compliant with the standard. The instructions for completing and submitting an exception request are contained in the current version of *COV ITRM Enterprise Architecture Policy*. The Policy and the exception request form are both on the ITRM Policies, Standards and Guidelines Web page at:
<https://www.vita.virginia.gov/it-governance/itrm-policies-standards/>

To request an exception to all security related ITRM Standards please refer to the *Process for Requesting Exceptions* section of the Information Security Policy - COV ITRM Policy (SEC519-) on the ITRM Policies, Standards and Guidelines Web page at:
<https://www.vita.virginia.gov/it-governance/itrm-policies-standards/>

Executive Summary

Objective

In 2015 ~~the~~ The Social Media Topic Report team was tasked with developing an overall policy for executive branch agencies to use when:

- determining whether to engage in social media efforts; or
- considering whether their agency social media use follows recommended practices and requirements.

The team consisted of representatives from VITA and several Commonwealth of Virginia executive branch agencies. Its members, who met over a six-month period, are experienced in social media, IT, web development and programming, marketing and communications. They use social media ~~too~~ platforms every day, personally and professionally.

In 2019 the team reviewed and updated the 2015 topic report. The updates are identified below in the document.

About Social Media Use in 2018⁴

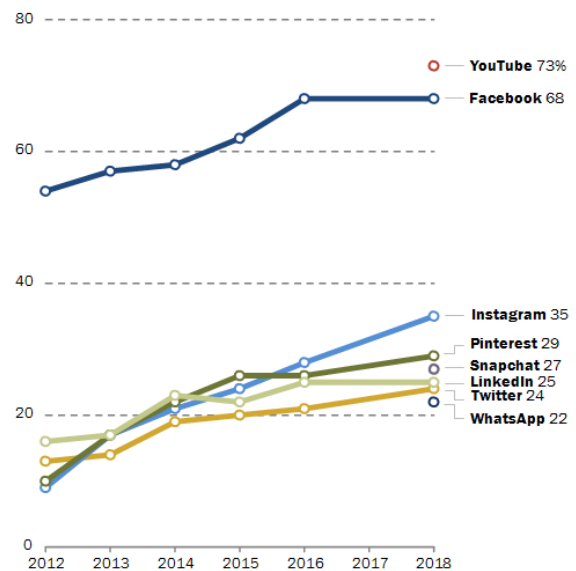
A new Pew Research Center survey of U.S. adults finds that the social media landscape in early 2018 is defined by a mix of long-standing trends and newly emerging narratives.

"Facebook and YouTube dominate this landscape, as notable majorities of U.S. adults use each of these sites. At the same time, younger Americans (especially those ages 18 to 24) stand out for embracing a variety of platforms and using them frequently. Some 78% of 18- to 24-year-olds use Snapchat and a sizeable majority of these users (71%) visit the platform multiple times per day. Similarly, 71% of Americans in this age group now use Instagram and close to half (45%) are Twitter users."

"As has been the case since the Center began surveying about the use of different social media in 2012, Facebook remains the primary platform for most Americans. Roughly two-thirds of U.S. adults (68%) now report that they are Facebook users, and roughly three-quarters of those users access Facebook on a daily basis. With the exception of those 65 and older, a majority of Americans across a wide range of demographic groups now use

Majority of Americans now use Facebook, YouTube

% of U.S. adults who say they use the following social media sites online or on their cellphone



Note: Pre-2018 telephone poll data is not available for YouTube, Snapchat or WhatsApp. Source: Survey conducted Jan. 3-10, 2018. Trend data from previous Pew Research Center surveys.

"Social Media Use in 2018"
PEW RESEARCH CENTER

⁴ Social Media Use in 2018, Pew Research Center, http://www.pewinternet.org/wp-content/uploads/sites/9/2018/02/PI_2018.03.01_Social-Media_FINAL.pdf, Retrieved 1019-03-01

Facebook.”

“But the social media story extends well beyond Facebook. The video-sharing site YouTube – which contains many social elements, even if it is not a traditional social media platform – is now used by nearly three-quarters of U.S. adults and 94% of 18- to 24-year-olds. And the typical (median) American reports that they use three of the eight major platforms that the Center measured in this survey.”

“These findings also highlight the public’s sometimes conflicting attitudes toward social media. For example, the share of social media users who say these platforms would be hard to give up has increased by 12 percentage points compared with a survey conducted in early 2014. But by the same token, a majority of users (59%) say it would not be hard to stop using these sites, including 29% who say it would not be hard at all to give up social media.”

~~1. Social media tools provide ways to build community and rapidly communicate directly with stakeholders, partners, the general public and the media. They allow an agency to tell its story, foster a culture of transparency, share its values with the public and provide useful information to those served.~~

~~2. The term “social media” commonly describes online communication tools that offer immediacy, engagement, a sense of community and sharing of information in multiple ways across different platforms. In the past decade, new forms of social media have found large audiences at home and at work while continuing to evolve.~~

~~3. Increasingly, Americans turn to the Internet and social media tools to gather information and exchange communication with government agencies. In 2010, the Pew Research Internet Project report, “[Government Online](#),”⁶ found that **31 percent** of online adults use social media and related tools to access government services and information. Of adults who use the Internet, **40 percent** went online in the preceding year to access information about government. With the explosion in the use of social media since 2010, those figures likely are much higher today.~~

~~4. The Social Media Update 2014⁷ by the Pew Research Internet Project found that **52 percent** of online adults used two or more social media sites, up from **42 percent** in 2013.~~

Agency Use

It is not a foregone conclusion that every agency should use social media. These ~~tool~~ platforms require resources, time and personnel. Clear, thoughtful goals must be set, managed and regularly updated to ensure agencies meet business and service needs. They must fit into the agency’s overall communications strategy and help reach the intended audience(s). An agency may choose to use one or more forms, depending on its mission, needs, resources, goals and audiences, or opt not to use social media.

Agencies may be familiar with these recommended practices and may already follow them. The team encourages agency leaders to engage their communications staff in deciding whether to incorporate social media into their overall strategy and to develop policies that will guide the agency’s efforts in this arena.

Agencies differ in their use of and goals for social media, just as agencies’ missions

and goals differ. However, this report serves as a guide and provides an outline for a plan that all agencies can use.

An agency using social media should be prepared to *meet accessibility standards*. [Section 508 of the Rehabilitation Act \(29 U.S.C. § 794d\)](#) requires that federal agencies' electronic and information technology is accessible to people with disabilities, and the commonwealth accepts the Americans with Disabilities Act as its legal standard, pursuant to [Code of Virginia, § 2.2-2012 \(Procurement of Information Technology and Telecommunications Goods and Services\)](#) respond to Freedom of Information Act (FOIA) requests and should have considered how records retention and disposition requirements under the Public Records Act and applicable schedules apply to the agency's social media records.

An agency using social media should be prepared to respond to Freedom of Information Act (FOIA) requests and should have considered how records retention and disposition requirements under the Public Records Act⁵ and applicable schedules apply to the agency's social media records.

Conclusion

~~Each agency using, or planning to use, social media shall develop a written plan, which must be approved by agency leadership. Agencies with existing social media plans must have them approved by agency leadership within six months of the effective date of the Social Media Topic Report. The agency shall review and update its plan if needed when there is a subsequent, material change to the plan or every year, whichever occurs first.~~

Information, messages and calls to action can be delivered via social media to reach audiences where they already are, draw in new constituents and open a dialog that allows agencies to meet their missions and more effectively serve the public. At its best, social media provides an engaged, authentic and credible voice and human face for official agency interaction.

⁵ Virginia Public Records Act, [Code of Virginia § 42.1-76](#) et. Seq.

ETA Social Media Topic Report Scope and Purpose

Scope of this Report

The requirements in this report are applicable to all executive branch state agencies responsible for the management, development, purchase and use of information technology resources in the COV.

Purpose of this Report

This report was written to help executive branch agencies ~~decide if they should~~ use social media in a communications, community engagement or policy consultation context. It is intended to be useful to managers and leadership teams as well as the practitioners who administer social media efforts.

As with any communications channel, social media projects require proper planning, benefit and risk assessment, resourcing and commitment.

This report addresses the issues that need to be considered ~~before~~ as an agency ~~begins using~~ uses social media. It offers information to help with benefit and risk assessment and a business case template designed to stimulate thinking around some of the key areas that need to be considered.

Key resources influencing the content of this report are recommendations from the Gartner Blog Network,⁸ excerpts from Gartner, Inc. research reports, the General Services Administration (GSA) Social Media Handbook⁹ the New Zealand Government, Department of Internal Affairs^{10, 11} and the Pew Research Center⁶. Other resources influencing this report are listed in the appendices.

Business and Service Drivers

Business and service drivers for considering the use of social media include widespread use among target audiences, growing citizen expectations for an online presence, increasing citizen desire for engagement ~~tools~~ platforms, and successful use in the private sector, federal government and other states.

Increasingly, citizens expect to communicate with government agencies using the same media ~~tools~~ platforms and channels they use for other purposes.

To effectively utilize social media, agencies should consider whether social media will assist in meeting their business needs, mission and goals.

⁶ The Best Government Social Media Guidelines So Far Come from New Zealand, Gartner, Inc., blogs.gartner.com/andrea-dimaio/2011/12/01/best-government-social-media-guidelines-so-far/, Retrieved 2014

⁶ Social Media Use in 2018, Pew Research Center http://www.pewinternet.org/wp-content/uploads/sites/9/2018/02/PI_2018.03.01_Social-Media_FINAL.pdf Retrieved 2019-01-09

Business and Service Drivers	
Technology Business Plan Initiatives 2016⁷	COVA Strategic Plan for IT: 2017-2022⁸
<p>Commonwealth Initiative 1—Emphasize programs and platforms that enable all citizens to interact with government safely and securely, and when, how, and where they want to interact.</p>	<ul style="list-style-type: none"> • Encourage greater efficiencies and effectiveness in the use of technology to accomplish government business and help make the user’s experience with the content informative, accurate and timely.
<p>Commonwealth Initiative 7: Expand and support enterprise and collaborative IT services to implement business focused approach to IT services.</p> <p>The Commonwealth Strategic Plan for Information Technology recognizes the benefits of this approach in the “enterprise shared services” technology trend. That trend calls for continuing “to support, and where appropriate, extend the model of enterprise shared services to improve efficiency and effectiveness in commonwealth operations where business functions and data cross departmental boundaries.”</p>	<ul style="list-style-type: none"> • Update the SMTR for citizen and agency use; • Coordinate the adoption of social media to meet citizen communication expectations; • Improve transparency; and • Support collaboration and knowledge sharing among the commonwealth workforce.
<p>Agencies could reference these in their strategic plans and IT plans.</p>	

Commonwealth or Agency Strategic Plan—Initiative or Critical Issue	Project Business Objectives
<p>Commonwealth Goal: Provide a policy framework for social media use ... to promote and coordinate the adoption of social media to meet citizen communication expectations and improve transparency.</p>	<ul style="list-style-type: none"> • Provide direction for agency social media use; • Standardize adoption and use of social media; • Interact with users where they already are; and • Communicate about agency activities in a widely adopted format.
<p>Commonwealth Initiative 1: Emphasize programs and tools that enable all citizens to interact with government 24/7, safely and securely, and when, how and where they want it.</p>	<ul style="list-style-type: none"> • Encourage greater efficiencies and effectiveness in the use of technology to accomplish government business; • Help make users’ experience with government informative, accurate and timely; • Provide information about agency services to target audiences; and • Provide another channel for audiences to communicate with government.

⁷ COVA Strategic Plan for Information Technology: <https://www.vita.virginia.gov/media/vitavirginiagov/it-governance/itsp/pdf/COVStrategicPlanInformationTechnology07.pdf>

⁸ COVA Strategic Plan for IT: 2012 -2018: <http://www.vita.virginia.gov/library/default.aspx?id=6442471252>

ETA Social Media Topic Report – Categories, Terms of Use and Levels of Engagement

Social Media Categories

The core social media categories are:

1. **Social networks** – A term referring to websites and applications (apps) used to connect and interact with other individuals. Interaction can be more casual than traditional government communication and entirely web-based. Examples include Facebook, LinkedIn and Twitter.
2. **Media sharing networks** – Websites and apps that allow users to share and comment on video and images. Examples include YouTube, Pinterest, Instagram and Flickr.
3. **Blogs** – Short for ~~Web~~ *web* log. A blog is a collection of informal and chronologically ordered posts written in a conversational style. Examples of blog platforms include Blogger, Tumblr and WordPress.
4. **Wikis** – Web-based applications which allow users to add content to or edit a web page. An example is Wikipedia.
5. **Forums** – Online applications for holding themed discussions of topics among groups of participants. An example is Reddit.

Ensure Terms of Service Review

Agencies and staff should be aware of the Terms of Service (TOS) of each social media site. Each platform has its own unique TOS that upon acceptance become a legal contract between the provider and the user. Not all third-party social media sites offer TOS that are acceptable to the commonwealth, nor are all state employees legally capable of entering into such contracts.

Agencies should ensure, with legal advice as needed, that social media TOS are within agency authority and acceptable to the commonwealth. Employees who complete agreements with social media providers and accept TOS for the agency must have authority to enter into those contracts. Once agreements have been set, any employee using a form of social media on behalf of a state agency should consult the most current TOS in order to avoid violations.

Levels of engagement

1. ~~**Discovery** – Software that enables interactions, conversations and collaboration within the context of other activities – such as creating content, tracking the progress of projects and supporting customers.~~
2. ~~**Collaborate** – Software that enables, supports and captures communications, conversations or collaborative work through interaction and open participation, especially where large numbers of loosely connected individuals interact within the agency, or with external parties such as customers, partners or the broader public on the social Web.~~
3. ~~**Analyze** – Software that analyzes filters or searches artifacts of social~~

~~interactions and other content, and to enable discovery.~~

ETA Topic-wide Principles, Recommended Practices and Requirements

The following principles, recommended practices and requirements pertain to all components, in all situations and activities related to the ETA Social Media Topic Report.

Topic-wide Principles

The Social Media Topic Report team identified the following topic-wide principles. The principles are influenced by, and may be excerpts from, the "Guiding Principles" from the GSA Social Media Policy,¹⁴ the "Basic principles for staff" from New Zealand's "Social Media in Government: High-level Guidance"¹⁵ and Gartner, Inc.'s "Seven Principles for Government Social Media Strategies."¹⁶

The Social Media Topic Report team identified the following topic-wide principles and requirements:

- SOC-P-01** **Published Content** - Published content persists in the public domain. Deletion does not guarantee its unavailability. The agency is responsible for its content published on social media. Assume agency communications remain publicly available for publishing or discussion in all forms of media at any time.
- SOC-P-02** **Coordination** - Social media efforts should coordinate and align with existing agency communication strategies and the agency's mission.
- SOC-P-03** **Public Facing Position** - State employees must be aware of connecting their personal and agency association in online social networks. The employee must conform to existing policies, such as DHRM (1.60) Standards of Conduct and DHRM (1.75) Use of Internet and Electronic Communication Systems and any agency specific policies or standards. Regardless of what privacy settings are chosen, employees should be aware that shared content can be reshared beyond expected bounds, that social media content may have professional consequences, and that listing their employer on social media accounts may create an unintended association between an employer and personal content.
- SOC-P-04** **Agency's Mission** - Remain focused on *the agency's audience customers*, existing commitments and achieving the agency's mission.
- SOC-P-05** **Be Credible** - Be accurate, fair, thorough and transparent.
- SOC-P-06** **Be Consistent** - Encourage constructive criticism and deliberation. Be cordial, honest and professional at all times.
- SOC-P-07** **Be Responsive** - Answer questions in a timely manner. Share agency insights where appropriate.

SOC-P-08 **Be Integrated** - Wherever possible, align the agency's online participation with its internal and external communications.

SOC-P-09 **Be a Good Custodian** – Check messages, post content and respond to comments (as appropriate) regularly. An untended and out-of-date account looks unprofessional.

Topic-wide Recommended Practices

Monitoring Comments:

In addition to creating content, agencies should monitor interactions taking place on the social media channels relevant to the agency. In some social media formats such as Facebook, blogs, Twitter responses, etc., you may encounter comments which cause you concern as a moderator or responsible party. If user content is positive or negative and in context to the conversation, then the content should be allowed to remain, regardless of whether it is favorable or unfavorable to the state. Agencies should consider the use of profanity blocking platforms. Administrators should be aware of the possibility of online harassment and respond in accordance with the agency's social media policy. Removed content should be documented and retained in compliance with the Virginia Public Records Act.

SocialMediaToday provides a list of some of the best social media monitoring platforms⁹. Please note, this list is not all inclusive and changes frequently. Its purpose is to provide agencies with an idea of the platforms currently available.

The Social Media Topic Report team identified the following topic-wide recommended practices.

SOC-RP-01 **Choose Appropriate Social Media Platforms Tools** – Agencies should find and assess the social media platform tools that its target audiences are using. Conduct an environmental scan to monitor what is being said about the agency. Agencies should observe, learn the platform and understand the tone and concerns of a social media community.

- a.) Once an agency has established a social media presence, the agency should promote those accounts so target audiences are aware they exist, such as on the website, on brochures or on signs/posters.
- b.) Agencies should use the current and approved logo for each social media platform when promoting the agency's presence on a site (ex: use the most up-to-date logos).
- c.) Social media sites, and the information shared on them, should not replace the agency's website. Target audiences should be able to find all necessary and applicable information about an agency from the website. Some duplication of information may occur,

⁹ 20 Of of the Best Social Media Monitoring Platforms to Consider, SocialMediaToday, <https://www.socialmediatoday.com/news/20-of-the-best-social-media-monitoring-tools-to-consider/545036/>

but an increase of social media usage should not come at the detriment of keeping a website up to date.

- d.) Some social media providers require organizations to link their social media pages to their official websites.

SOC-RP-02 Provide More Information – If possible, agencies should provide a link or contact information with each post to help an interested user get more information about the posted topic/material.

Topic-wide Requirements

The Social Media Topic Report team identified the following topic-wide requirements.

SOC-R-01 Enterprise Application Compliance - Agencies shall ensure that their use of social media complies with applicable standards, such as the Enterprise Architecture Standard (EA225-series GOV103-00), Virginia Information Technology Agency Accessibility Standard (GOV103-225-series00), the Information Security Policy (SEC519-225-series00), all Information Security Standards (SEC502-series) and other security related requirements.

SOC-R-02 Prohibited Topics – Agencies shall avoid:

- a.) Engaging in publishing and or sharing vulgar or abusive content language, personal attacks of any kind, or offensive terms targeting individuals or groups
- b.) Endorsement of commercial products
- c.) Endorsement of political parties, candidates or groups
- d.) Lobbying members of the General Assembly using agency resources

SOC-R-03 Be a Good Custodian – Social media use requires the agency to be a “good custodian,” one that posts regularly, moderates comments as appropriate and checks often for content messages that may require a response.

SOC-R-04 Records Retention and Disposition - Ensure that content information is created, kept and, if necessary, disposed of in accordance with agency policies and the Library of Virginia public records retention and disposition schedules.¹⁷

SOC-R-05 Freedom of Information Act (FOIA) - Electronic Content, whether text, audio, video or photographs, posted to social media channels, is subject to the [Commonwealth's Freedom of Information Act](#) (§ 2.2-3700 et. Seq. of the *Code of Virginia*) at: law.lis.virginia.gov/vacode/title2.2/chapter37/. All public records are presumed to be open and may be withheld only

if a statutory exemption applies. FOIA requests may cover social media content and/or be submitted via social media channels.

SOC-R-06 Use of Electronic Communications and Social Media (DHRM Policy 1.75)

Agencies shall ensure use of social media complies with the DHRM Policy 1.75 "[Use of Electronic Communications and Social Media.](#)"

SOC-R-07 Document Business Case - Agencies using social media shall have a written business case for each social media platform that clearly defines goals, measurement standards, target audiences, benefits, approval processes, risks and resources. The agency must also include in the business case an internal employee social media policy and external commenting policy.

SOC-R-08 Follow All Applicable Laws - An agency shall adhere to all applicable laws, including state records law, copyright and other intellectual property law, and constitutional and statutory limitations regarding speech.

SOC-R-09 Safeguard Sensitive Information - Agencies shall not share or post sensitive information, such as personally identifiable information on agency sponsored sites. Do not publish or report on conversations that are meant to be pre-decisional or internal, unless given permission by management. Agencies shall alert users to not submit personal information.

Social Media Branding

Consistency assists the public in recognizing official channels.

SOC-RP-13 Agency social media branding: *Agencies should strive for consistent branding across social media platforms and with the agency's existing communications outreach, where possible.*

ETA Social Media Topic Report Technical Topics

As with any communications initiative, social media use requires proper planning, benefit and risk assessment, resourcing and commitment.

Business and Service Needs

Before implementing social media initiatives, it is important to consider whether social media will assist in meeting an agency's business and service needs and goals. Agencies shall determine whether there are existing social media channels being employed in the agency. If so, determine how each platform, channel and/or group fits into the overall communications strategy of the agency.

The key to social media planning is determining what success will look like. An agency should know what it hopes to achieve and why social media will help. If social media efforts don't have a clear aim, they are not likely to achieve a successful outcome or have a measureable return on the resources invested.

Using social media should not be a foregone conclusion. First decide what needs to be achieved, and then decide whether technology can play a part in helping to do this.

The Social Media Topic Report team identified the following business and service needs technical topic-specific requirements:

SOC-R-10 **Identify Existing Channels** – Agencies shall determine whether there are existing social media channels being employed in the agency or by external entities and or partners. Determine how each platform, channel and/or group fits into the overall communications strategy of the agency.

Rationale:

If there are existing social media channels, it is important to determine if all are needed. If so, all agency social media channels should have a consistent message, and should cross-promote activities where appropriate.

SOC-R-11 **Define Goals** - Before expending time, effort and resources, the agency shall decide why and how social media will be used to meet business and service goals.

SOC-R-12 **Define Audiences** – Agencies shall define any and all current and potential audiences. This determination can affect the social media platform ~~to~~ chosen.

Rationale:

Social media can have a variety of audiences, such as:

- stakeholders;
- vendors;
- employees;
- legislators;

- media;
- executive branch agencies; and/or
- residents and visitors. ~~commonwealth citizens.~~

Consider target groups carefully when refining a business case. The more targeted the engagement is, the higher quality it is likely to be. However, the engagement also will be less diverse and require more research. The approach will depend on the social media goal. While this distinction may seem self-evident, the demographics to be engaged will have a significant impact on the direction of the social media effort.

Business Case

The business case should include the rationale and justification for selecting a social media platform as a communications channel for a business need, together with relevant risks and mitigations. As with all other channel evaluation, it is important to consider the context in which it will be applied and how that will contribute toward achieving the agency's overall strategic aims.

The suggestions here aim to stimulate thinking around some of the key areas for consideration when planning to use social media and may be used to form the business case document for the agency.

The Social Media Topic Report team identified the following business case technical topic-specific recommended practices:

- SOC-RP-03** **Integrate** – Agencies should consider social media in the context of the wider communications strategies.
- SOC-RP-04** **Support** – Where possible, agencies should use hard data to support the business case.
- SOC-RP-05** **Identify** - Agencies should conduct a needs analysis to identify where there are communication gaps and detail how social media efforts would help address them.
- SOC-RP-06** **Measure** – Agencies should incorporate specific tools for measuring and benchmarks of evaluation ~~from the start~~.
- SOC-RP-07** **Evaluate** – Agencies should determine what skills, experience and resources will be needed to implement social media. To determine this, agencies should address the following questions:
 - a) What skills, experience and resources (e.g. IT capability, funding) will be needed to implement and maintain social media efforts? Are they available and, if not, where will they be found?
 - b) Will execution of social media be handled largely in-house or will an external provider be required?
 - c) What is the total budget required?

The Social Media Topic Report team identified the following business case topic-specific requirements:

- SOC-R-13 Create a Social Media Plan** – Agencies shall create a written social media plan to, ~~which shall~~:
- a.) include a risk assessment to address opportunities, challenges and weaknesses per the Commonwealth’s IT Risk Management Guidelines (SEC506-series);¹⁰
 - b.) identify goals;
 - c.) identify target audience(s);
 - d.) predict and plan for potential audience reactions and interactions;
 - e.) identify, define and document roles and responsibilities;
 - f.) determine agency specific policies;
 - g.) develop clearly defined commenting policies;
 - h.) review resources and determine commitment/participation; and
 - i.) determine benefits (e.g. return on investment, awareness).

Social Media Plan Example

To assist agencies with the development of their social media plan, an example is attached in the Appendices.

Business Plan¹¹

As with the business case, the suggestions here aim to stimulate thinking around some of the key areas for consideration when planning to use social media and may be used to form the business plan document for the agency.

The Social Media Topic Report team identified the following business plan topic-specific recommended practices:

- SOC-RP-08 Using Social Media** – Agencies which plan to use social media should ensure an understanding of how sites work, how users respond, standard practices and acceptable behavior.

- SOC-RP-09 Message Determination** – Agencies should determine the purpose of *the content* messages and for whom the *content* messages *is* are intended:

- a) What content messages will ~~attract new audiences~~ further the

¹⁰ IT Risk Management Guidelines (SEC506-), Virginia Information Technologies Agency, www.vita.virginia.gov/uploadedfiles/VITA_Main_Public/Library/RiskManagementGuideline.pdf. Retrieved 2014-01-06

¹¹ Social Media Guideline, Government of Western Australia, www.publicsector.wa.gov.au/sites/default/files/wam-filerepo-docs/social_media_guidelines.pdf, Reserved 2014-01-10

agency's mission?

- b) What content messages will engage audiences?
- c) What do audiences want to know about the agency?
- d) What are audiences gaining from the agency's social media? Show the audience why the content message is important or relevant to them.

SOC-RP-10 **Communication Channel** – Agencies should research the target audience and how and where they communicate, such as, best platforms and opportune times for posts.

SOC-RP-11 **Anticipate Audience Feedback** – Agencies should research what issues may come up or questions the audience may ask. Agencies should provide that information in the content message. Agencies should also have a contact list of individuals to go to for answers to questions. An approval structure should exist for responding to inquiries.

SOC-RP-12 **Responding to Comments** – Agencies should anticipate audience interaction and plan for a variety of responses. Agencies need to determine if the response should be handled publicly or privately. It is accepted practice to message the person with an answer or to ask the individual to email or call a specific contact for further explanation.

Implementation

An Agency Social Media Implementation and Utilization Plan documents the results of the agency's analysis of its use, or planned use, of social media channels and compliance with the requirements identified in this document. It also addresses how the agency plans to bring the current or planned use of social media into compliance with those requirements and how to ensure that future use also is compliant.

The Social Media Topic Report team identified the following implementation topic-specific requirements:

SOC-R-14 **Agency Social Media Implementation and Utilization Plan** – Each agency using, or planning to use, social media shall develop a written plan, ~~within six months of the effective date of the Social Media Topic Report.~~

~~Agencies with existing implementation plans must have them approved by agency leadership within six months of the effective date of this Social Media Topic Report. The plan shall be reviewed and updated if needed when there is a subsequent, material change to the plan or every year (whichever occurs first).~~

The plan shall:

- a) contain an analysis of the social media content and

its compliance with related requirements identified in Social Media Topic Report; identify by requirement number all current non-compliant items;

- b) develop agency corrective action plans and schedules for correcting all non-compliant pages;
- c) describe the agency's process and procedures for ensuring future content is compliant; and
- d) describe the agency's continuity of operations plan, including planning for the absence of a staff member who normally manages a social media account.

SOC-R-15 Leadership Approval – Agency leadership shall approve the completed Agency Social Media Implementation and Utilization Plan, which includes the business case and the business plan.

Appendices

References and Links

The following references and links access select material that influenced the development of this report. The listing of these resources should not be read as an endorsement of all of their content and that what's appropriate may vary from jurisdiction to jurisdiction and agency to agency.

State Site/Document References:

Texas: External Social Media Policy
www.texas.gov/en/about/Pages/social-media-policy.aspx

New York: Social Media General Information
www.empire-20.ny.gov/resources

Delaware: Social Media Policy
dti.delaware.gov/pdfs/pp/SocialMediaPolicy.pdf

County and Localities References:

Arlington County, VA: Social Media Policy and Guidelines
sites.google.com/site/munigov20/good-reading-and-resources/Arlington%2CVA%20socialmediapolicy073009.pdf?attredirects=0&d=1

Fairfax County, VA: Social Media Policy
www.fairfaxcounty.gov/opa/fairfax-county-social-media-policy.pdf

Roanoke County, VA: Roanoke County Social Media Policy
sites.google.com/site/munigov20/good-reading-and-resources/RoanokeCountySocialMediaPolicy-Final.pdf?attredirects=0

City of Hampton, VA: Social Media Policy
sites.google.com/site/munigov20/good-reading-and-resources/hampton_vasocial_media_policy09-002.pdf?attredirects=0&d=1

Federal Site/Document References:

National Archives: Guidance on Managing Records in Web 2.0/Social Media Platforms:
www.archives.gov/records-mgmt/bulletins/2011/2011-02.html

GSA Social Media Policy

This Order provides requirements for the use of the General Services Administration's (GSA) social media accounts for official purposes.

<https://www.gsa.gov/about-us/newsroom/social-media/gsa-social-media-policy>

GSA Social Media Policy, OSC 2106.2

GSA Social Media Handbook, <http://www.gsa.gov/graphics/staffoffices/socialmediahandbook.pdf>

General References:

Examining State Social Media Policies: Closing the Gap – NASCIO:

www.nascio.org/publications/documents/NASCIO_2013SocialMediaIssueBrief.pdf

Social Media Guidelines

IBM Social Media Guidelines, <http://www.ibm.com/blogs/zz/en/guidelines.html>

Intel Social Media Guidelines, http://www.intel.com/sites/sitewide/en_US/social-media.htm

Social Media and Web 2.0 in Government, http://www.usa.gov/webcontent/technology/other_tech.shtml

Web 2 0 Governance Policies and Best Practices, <http://govsocmed.pbworks.com/Web-2-0-Governance-Policies-and-Best-Practices>

Hype Cycle for Content and Social Analytics, 2013 – Gartner, Inc.

www.gartner.com/document/2563715 and

www.gartner.com/document/code/251577?ref=grbody&refval=2563715, Retrieved 2014

Compelling Documents

Social Media Guidelines – Government of Western Australia, www.publicsector.wa.gov.au/sites/default/files/wam-filerepo-docs/social_media_guidelines.pdf, Retrieved 2014

Social media: Hands on Toolbox – New Zealand, webtoolkit.govt.nz/guidance/social-media/hands-on-toolbox/, Retrieved 2014

Social Media: High Level Guidance – New Zealand Government, webtoolkit.govt.nz/guidance/social-media/high-level-guidance/, Retrieved 2014

Social Media Plan Example – Each agency using, or planning to use, social media shall develop a written plan, which must be approved by agency leadership. Agencies with existing social media plans must have them approved by agency leadership within six months of the effective date of the Social Media Topic Report. The agency shall review and update its plan if needed when there is a subsequent, material change to the plan or every year, whichever occurs first.

On the following page is an example of a social media plan framework.

[INSERT AGENCY LOGO]

[Agency Name]
Social Media Plan
[Example]

Prepared: *[date prepared]*
Prepared by: *[agency name]*

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Social Media Planning Checklist

Social media can be intimidating, but with some research and planning, an agency can use it to their advantage. Below is a quick six step Social Media Planning Checklist. The checklist should be used together with the Commonwealth's *Social Media Topic Report*.

1. Conduct agency analysis

- Analyze the social media ~~tools~~ platforms available.
- Analyze the agency business and find out if it is ready for and willing to engage in social media.
- Analyze agency constituents to see if they use social media.
- Analyze similar agencies in other states and across the commonwealth ~~agency competitors~~ and their social media pages.

2. Develop agency social media strategies

- Read the agency's strategic or business plan and look at its main ~~business~~ goals and strategies.
- Determine whether social media can assist the agency, and if so what platforms would best achieve its goals.
- Develop strategies to help the agency develop its brand or build awareness and communicate/engage with constituents.

3. Establish the rules

- Develop ~~some~~ internal policies and procedures to cover security, privacy and content.
- Develop an acceptable use policy for your social media users.

4. Set up a team

- Organize a team with appropriate skills/training.
- Establish roles and responsibilities.
- Become familiar with the agency's internal policies and procedures.

5. Get started

- Identify and gather needed resources for rollout.
- Set up the agency channels ~~page/profile/blog~~.
- Build agency networks.
- Implement social media strategies.
- Develop a content plan.

6. Review

- Monitor and measure the impact of the agency's strategies.
- Adjust/modify the agency's strategies as needed.

1. Conduct the agency's analysis²¹

Social media platform ~~tool~~ analysis

[For each platform ~~tool~~, include the purpose or a general description and any opportunities or limitations.]

Social media <u>platform</u> tool / website	Purpose/description	Opportunities	Limitations
[List each social media <u>platform</u> tool that the agency intends to analyze.]	[What is the purpose of this social media <u>platform</u> tool or website? How do the agency's constituents use it?]	[Outline the specific areas of each <u>platform</u> tool that agency thinks its business will use and how.]	[Are there any rules or functionality that limit the agency's ability to use the <u>platform</u> tool ? E.g. strict terms and conditions. If needed, include a link to each <u>platform</u> 's tool terms and conditions.]

Business analysis

[Is social media suited to the agency's business? Are agency constituents or potential constituents likely to use social media? Does the agency have adequate skills or resources to launch an online social media presence? Also, for each social media platform ~~tool~~, list the main business goals, suitability to the agency's business and the skills and resources needed to use the platform ~~tool~~ in the table below.]

Social media <u>tool</u> / <u>website</u>	Business goals	Suitability	Skills/resources needed
[List each social media <u>platform</u> tool that the agency thinks it will potentially use.]	[Which business goals/objectives does this social media <u>platform</u> tool align with or help achieve?]	[Rank the <u>platforms</u> tools according to how suitable the <u>platform</u> tool agency's goal(s).]	[List any specific skills/resources that are needed to utilize this <u>platform</u> tool .]

²¹ The Social Media Plan Template and the Social Media Planning Checklist were adopted from the Social Media Plan Template and Guide developed by business.gov.au, the Australian Government's dedicated business website, located within the Department of Industry. Copies of the latest version of this and other free templates and guides can be downloaded from www.business.gov.au/business-topics/templates-and-downloads/Pages/default.aspx

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Online constituent analysis

[For each social media platform tool, include details of the agency's constituents and their online usage.]

Social media platform tool / website	Constituent demographics	Volume of constituents	Details of use
[List each social media <u>platform tool</u> these constituents use.]	[Analyze the agency's online constituent base. Include age, gender, social status, education and attitudes.]	[Estimate the number or percentage of the agency's overall constituents using social media.]	[Include frequency of use, purpose, and interaction quality (high, medium or low interaction).]

Comparable organizations analysis

[For each social media platform tool, list comparable organizations and details of their online presence.]

Social media platform tool / website Comparable	Organization	Online Market share (%)	Strengths	Weaknesses
[List each social media <u>platform tool</u> /website the agency intends to use.]	[Comparable Organizations names.]	[Enter an estimate of its percentage of market share for this tool/social media site. Alternatively, include the number of followers.]	[What are its main social media strengths?]	[What are its main social media weaknesses?]

Risk management

[List the potential risks of social media to the agency's business (in order of likelihood) and any mitigation/contingency strategies.]

Business risk	Impact	Likelihood	Mitigation strategy	Contingency plan
<i>[Description of the risk and the potential impact to the agency's <u>reputation and mission</u> business, e.g. risk of exposing sensitive information]</i>	<i>[High, Medium, Low.]</i>	<i>[Highly Unlikely, Unlikely, Likely, Highly Likely.]</i>	<i>[What actions will the agency take to minimize/mitigate the potential risk to its <u>reputation and mission</u> business?]</i>	<i>[What is the agency's contingency plan in the event that this risk happens?]</i>

2. Develop the agency's social media strategy

Vision and goals

Vision statement

[Include the agency's vision statement from its business/marketing plan. The vision statement briefly outlines the agency's future plan for the business. It should state clearly what the agency's overall goals for the business are.]

Goals/objectives

[Include short and long term goals from the agency's business/marketing plan. What activities the agency will undertake to meet them?]

The agency's audience

Target audience

[Who is the agency targeting through its social media platforms ~~tools~~/websites? What percentage of the agency's overall target audience ~~market~~ will be using social media?]

Communication/engagement strategy

[How will the agency communicate or engage with its target audience ~~market~~? How often? How will the agency establish and maintain this interaction?]

Social media platform tools /site	Constituents/users	Communication strategy	Frequency	Person/Team responsible
[List each social media platform tools /site the agency will be using use.]	[Include a brief description of the users the agency will be target ting for each social media <u>platform</u> tool .]	[How will the agency engage/communicate with these constituents? What strategies will the agency use to establish and maintain this interaction, e.g. promotional items?]	[e.g. Daily, twice-weekly, or weekly.]	[e.g. Social media team]

Social media strategy

[How does the agency plan to enter the social media space? What activities will the agency complete to develop its brand or build awareness? What does the agency want to achieve?]

Activity/milestone	Person responsible	Date of expected completion	Cost (\$)	Key Performance Indicators (KPIs)	Agency <u>business</u> goals
<i>[e.g. increase website traffic, search engine optimization, networking, and recruitment, paid advertising, in-app advertising reciprocal linking application development.]</i>	<i>[Who is responsible for completing this task?]</i>	<i>[When does the agency expect to complete the activity?]</i>	<i>[Estimated cost of activity.]</i>	<i>[What indicator/ measurement result will need to be met before this activity is considered a success?]</i>	<i>[Which <u>agency business</u> goals/objectives does this activity align with or help achieve?]</i>

3. Establish the rules

Social media content policy

[Has the agency established a content management policy based on its core values and mission? List the agency’s main policy details in the table below. Include a reason why they’re important to the agency and which social media platform ~~tools~~ they apply to. You may also like to attach a copy of the agency’s full social media policy as an appendix to this plan.]

Policy details <u>platform</u> tools	Reason	Applicable social media p tools
[Include what can and cannot be published, tone of voice and language principles, privacy -principles, non-disclosure principles and general constituent service standards.]	[Include a reason why each policy is important to the agency.]	[e.g. All social media <u>platform</u> tools

Social media content procedures

[Does the agency’s procedure include an approval process for all content? Has the agency included a content removal procedure for inappropriate content in compliance with the Library of Virginia’s record retention policies? Does it cover procedures around accepting friends/followers? Attach a copy of the agency’s full social media content procedures as an appendix to this plan.]

Constituent privacy strategy

[What current privacy strategies or procedures does the agency have in place to ensure the security of personal information? Has the agency introduced constituent service/privacy standards? ~~Does the agency follow any particular code of practice?~~

Security strategy and procedures

[What internal authorization procedures does the agency have for approval and monitoring of access to its online accounts?]

Acceptable use policies

[Does the agency have an acceptable use policy for each social media platform presence? Has the agency specified on that platform what content is not acceptable e.g. illegal or offensive comments/posts? Has the agency briefly outlined the procedures for warning users and the subsequent removal of the specified content/user?]

4. Create the agency's social media team

Roles and responsibilities

Role	Details of responsibilities	% of time spent on social media	Person responsible
<i>[e.g. Social media manager]</i>	<i>[e.g.</i> <ul style="list-style-type: none"> ▪ <i>Develop and implement social media strategies</i> ▪ <i>Develop and implement marketing campaigns</i> ▪ <i>Perform regular monitoring and measurement activities</i> ▪ <i>Manage social media team</i> ▪ <i>Engaging with stakeholders and partners.]</i> 	20%	<i>[e.g. J. Smith, Marketing Manager]</i>

Key personnel training

[List the agency's current/future staff in the table below and any training requirements.]

Job Title	Name	Skills or strengths	Training requirements
[e.g. Marketing Manager]	[e.g. J. Smith]	[Relevant qualifications in Marketing.]	[Requires training in social media marketing.]

5. Get Started

Action plan

[Before the agency gets started, list the main actions/milestones the agency hopes to achieve in the first months/year, i.e. researching similar organizations, or completing your social media plan. Then, once the agency is more confident in social media, it can include things like website traffic numbers, friend/follower numbers or engagement milestones.]

Action/Milestone	Date of expected completion	Person responsible
[What are the social media milestones that the agency needs to complete starting from today?]	[When does the agency expect to complete them?]	[Who is responsible for delivering this milestone?]

6. Monitoring/measurement activities

[How does the agency measure the impact of its strategy? How has it improved the agency’s overall sales/awareness objectives? Is it effective? If not, how can the agency modify its strategy to get a better result? List the details of each review in the table below.]

Social media activity	Date of review	Monitoring methods	Review outcomes
[e.g. website traffic, search engine optimization, networking, recruitment, in-app advertising, reciprocal linking, application development.]	[What tools did the agency use to measure/monitor the impact of its social media activities?]	[What were the results for the promotional period? Did the agency’s activities/milestones achieve its Key Performance Indicators (KPIs)? How many new/repeat constituents did the agency receive? How many constituents were referred to the agency’s website through the social media account	

Supporting documentation

Attached is the agency’s supporting documentation in relation to this social media plan. The attached documents include:

- [List all of the agency’s attachments here. These may include resumes, white papers, reports, case studies, policies and procedures.]

