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 Director of the Policy, Practice and 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.virgina.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.

Version	Date	Revision Description
1.0	12/23/2015	Original Topic Report
1.1	03/01/2016	Repaired broken links

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~~**EXA-R-03**   **Technology Standard Example of Deleted Standard –** This standard was rescinded on mm/dd/yyyy.~~

Table of Contents

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] feeds[1]), moderated discussion tools, 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 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.[2]

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.[3]

As Nielsen reports, 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

"Social media"[4] - 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]

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[1] Often called Rich Site Summary

[2] Part Two: Government engagement using social media and the government participatory class, Pew Research Internet Project, Retrieved 2014-12-02

[3] "State of the media: The social media report 2012". *Featured Insights, Global, Media & Entertainment,* Nielsen.com, Retrieved 2013-12-16

[4] CIO P 2106.2 GSA Social Media Handbook, General Services Administration 2009-07-17, Retrieved 2013-12-16

[5] Use of Electronic Communications and Social Media (DHRM Policy 1.75), www.dhrm.virginia.gov/hrpolicy/pol175UseOfInternet.pdf. Retrieved 2013-12-12

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

- <u>Principles</u> – 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.

- <u>Recommended Practices</u> – 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.

- <u>Requirements</u> – 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 www.vita.virginia.gov/library/default.aspx?id=537.

Agency Exception Requests

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 www.vita.virginia.gov/library/default.aspx?id=537.

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 www.vita.virginia.gov/library/default.aspx?id=537.

Executive Summary

Objective

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 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 tools every day, personally and professionally.

About 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 2014 [7] 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 tools 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.

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[6] Government Online, Pew Research Internet Project 2010, www.pewinternet.org/2010/04/27/government-online/ Retrieved 2013-12-12

[7] Social Media Update 2014, Pew Research Internet Project, www.pewinternet.org/

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 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.

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.

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 an agency begins using 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 Handbook[9] and the New Zealand Government, Department of Internal Affairs.[10; 11] 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, 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 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.

Business and Service Drivers	
Commonwealth or Agency Strategic Plan – Initiative or Critical Issue	*Project Business Objectives*
Commonwealth Goal: Provide a policy framework for social media use … to promote and coordinate the adoption of social media to meet citizen	• Provide direction for agency social media use; • Standardize adoption and use of social media;

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[8] 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 2014-01-02
[9] CIO P 2106.2 GSA Social Media Handbook, General Services Administration 2009-07-17, Retrieved 2013-12-16
[10] Social media: High-level guidance, webtoolkit.govt.nz/guidance/social-media/high-level-guidance/, Retrieved 2014-01-02
[11] Social media: Hands-on toolbox, New Zealand, https://webtoolkit.govt.nz/guidance/social-media/hands-on-toolbox/, Retrieved 2014-01-02

communication expectations and improve transparency.[12]	• Interact with users where they already are; and • Communicate about agency activities in a widely adopted format.
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.[13]	• 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.

Table 1 – Business Drivers

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[12] COVA Strategic Plan for IT: 2012 -2018: http://www.vita.virginia.gov/library/default.aspx?id=6442471252
[13] COVA Strategic Plan for Information Technology:
vita.virginia.gov/uploadedFiles/VITA_Main_Public/ITAC/Meetings/2012/SCOTT_COVIT.pdf

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 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.

Terms of Service

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 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.

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[14] CIO P 2106.2 GSA Social Media Handbook, General Services Administration 2009-07-17, Retrieved 2013-12-16
[15] Social media: High-level guidance, https://webtoolkit.govt.nz/guidance/social-media/high-level-guidance/, Retrieved 2014-01-02
[16] Seven Principles for Government Social Media Strategies, Gartner, Inc. my.gartner.com/portal/server.pt?open=512&objID=260&mode=2&PageID=3460702&resId=1658715&ref=QuickSearch&sthkw=Social+Media+in+Government, Retrieved 2013-12-12

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

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

SOC-RP-01   **Choose Appropriate Social Media Tools** – Agencies should find and assess the social media 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, 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 (EA GOV103-00), Virginia Information Technology Agency Accessibility Standard (GOV103-00), the Information Security Policy (SEC519-00), all Information Security Standards (SEC502-series) and other security related requirements.

SOC-R-02   **Prohibited Topics —** Agencies shall avoid:

   a.)   Engaging in vulgar or abusive language, personal attacks of any kind, or offensive terms targeting individuals or groups.

   b.)   Endorsement of commercial products, services or entities.

   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 messages that may require a response.

SOC-R-04   **Records Retention and Disposition** - Ensure that 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."[18]

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. Do not publish or report on conversations that are meant to be pre-decisional or internal, unless given permission by management.

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[17] Virginia Public Records Act. law.lis.virginia.gov/vacode/title42.1/chapter7/ Retrieved 2014-12-04

[18] Use of Electronic Communications and Social Media (DHRM Policy 1.75), www.dhrm.virginia.gov/hrpolicy/pol175UseOfInternet.pdf. Retrieved 2013-12-12

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. 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 tool chosen.

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

- stakeholders;
- vendors;
- employees;
- legislators;
- media;
- executive branch agencies; and/or
- 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 social media as a communications channel, 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, which shall:

    a.)   include a risk assessment to address opportunities, challenges and weaknesses per the Commonwealth's IT Risk Management Guidelines (SEC506-series); [19]
    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 Appendences.

Business Plan[20]

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 messages and for whom the messages are intended:

    a) What messages will attract new audiences?

    b) What 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 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 messages. Agencies should also

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

[20] 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

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%2CVAsocialmediapolicy073009.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 Achieves: Guidance on Managing Records in Web 2.0/Social Media Platforms
www.archives.gov/records-mgmt/bulletins/2011/2011-02.html

General References:

Examining State Social Media Policies: Closing the Gap —
NASCIO: www.nascio.org/publications/documents/NASCIO_2013SocialMediaIssueBrief.pdf

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 2014-01-06**

Compelling Documents

Virginia Government Social Media Links — A directory of Virginia government social media is available on the state portal website: www.virginia.gov;
http://www.virginia.gov/Government/State-Employees/Agency-Directory

Social Media Guidelines — Government of Western Australia,
www.publicsector.wa.gov.au/sites/default/files/wam-filerepo-docs/social_media_guidelines.pdf,
Retrieved **2014-01-10**

Social media: Hands on Toolbox — New Zealand, webtoolkit.govt.nz/guidance/social-media/hands-on-toolbox/, **Retrieved 2014-01-02**

Social Media: High Level Guidance — New Zealand
Government, webtoolkit.govt.nz/guidance/social-media/high-level-guidance/, Retrieved 2014-01-02

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*]

Table of Contents

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 available.
   - ☐ Analyze the agency business and find out if it is ready for social media.
   - ☐ Analyze agency constituents to see if they use social media.
   - ☐ Analyze agency competitors and their social media pages.

2. **Develop agency social media strategies**
   - ☐ Read agency business plan and look at its main business goals and strategies.
   - ☐ Determine whether social media can assist the agency.
   - ☐ 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 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 analysis[21]

Social media tools analysis

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

Social media tool/website	Purpose/description	Opportunities	Limitations
[List each social media tool that the agency intends to analyze.]	*[What is the purpose of this social media tool or website? How do the agency's constituents use it?]*	*[Outline the specific areas of each 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 tool? E.g. strict terms and conditions. If needed, include a link to each tool's 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 tool, list the main business goals, suitability to the agency's business and the skills and resources needed to use the tool in the table below.]

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

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[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

Online constituent analysis

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

Social media tool/website	Constituent demographics	Volume of constituents	Details of use
[List each social media tool 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 tool, list comparable organizations and details of their online presence.]

Social media tool/website	Comparable Organizations	Online Market share (%)	Strengths	Weaknesses
[List each social media tool/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
[Description of the risk and the potential impact to the agency's business,. e.g. risk of exposing sensitive information]	*[High, Medium, Low.]*	*[Highly Unlikely, Unlikely, Likely, Highly Likely.]*	*[What actions will the agency take to minimize/mitigate the potential risk to its business?]*	*[What is the agency's contingency plan in the event that this risk happens?]*

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 market

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

Communication/engagement strategy
[*How will the agency communicate or engage with its target market? How often? How will the agency establish and maintain this interaction?*]

Social media tool/site	Constituents/users	Communication strategy	Frequency	Person/Team responsible
[*List each social media tool/site the agency will be using.*]	[*Include a brief description of the users the agency will be targeting for each social media 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 market? 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)	Business goals
[e.g. increase website traffic, search engine optimization, networking, recruitment, paid advertising, in-app advertising, reciprocal linking, application development.]	*[Who is responsible for completing this task?]*	*[When does the agency expect to complete the activity?]*	*[Estimated cost of activity.]*	*[What indicator/ measurement result will need to be met before this activity is considered a success?]*	*[Which business goals/objectives does this activity align with or help achieve?]*

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 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	Reason	Applicable social media tool
[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 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? 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 presence? Has the agency specified 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
[e.g. Social media manager]	*[e.g.* ▪ *Develop and implement social media strategies* ▪ *Develop and implement marketing campaigns* ▪ *Perform regular monitoring and measurement activities* ▪ *Manage social media team* ▪ *Engaging with stakeholders and partners.]*	*20%*	*[e.g. J. Smith, Marketing Manager]*

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.*]	[*e.g. Month/Year*]	[*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.*]