



MEMORANDUM

Date: January 21, 2016

To: The Honorable Chair and Members
Pima County Board of Supervisors

From: C.H. Huckelberry
County Administrator

A handwritten signature in black ink, appearing to be "CHH", is written over the printed name "C.H. Huckelberry".

Re: **Deletion of Social Media Comments and Adherence to the State's Public Records Law**

It has come to my attention that some County elected officials have been deleting comments and postings from their County social media accounts and also banning some members of the public from posting comments on their social media accounts. These deletions may be in violation of the State's public records laws, ARS 39.121 and ARS 41.151.15. Furthermore, banning some persons from government social media may be unduly constraining their First Amendment free speech rights.

In November 2015, the Board of Supervisors adopted Board of Supervisors (BOS) Policy 33.2 (Attachment 1), which made it County policy to use social media when appropriate to communicate County policies, programs and general information to the public. As a guide for social media use by County staff, I issued Administrative Procedure (AP) 3-31 (Attachment 2), which was revised in November 2015 to remain current with the rapid expansion and changes in social media applications.

While the Board in BOS Policy 33.2 specifically exempted elected officials from adherence to AP 3-31 to avoid obvious conflicts with County staff charged with implementing and overseeing County social media use, it did not and cannot exempt elected officials from the State's public records laws.

The Procedure provides County social media users with guidelines for the types of social media posts and comments that can be deleted. If a comment requires deletion from a social media account – a threat of violence, for example – the comment must be preserved and maintained by the County department or office responsible for the account in accordance with the records retention guidelines set by the State Library, Archives & Public Records Department. Knowingly destroying a public record is a felony (ARS 38-421).

There may also be occasion when a member of the public persistently posts content on social media that violates the guidelines outlined in AP 3-31, and the only recourse is to block their ability to post such content. Restricting members of the public's ability to

The Honorable Chair and Members, Pima County Board of Supervisors
Re: Deletion of Social Media Comments and Adherence to the State's Public Records Law
January 21, 2016
Page 2

address their government and elected officials, even via online social media, should be considered with due care and with an eye toward allowing as much speech as possible. The Town of Oro Valley last year banned a member of the public from its Facebook page, and the banned individual filed a complaint with the American Civil Liberties Union (Attachment 5). It should be noted that the list of banned individuals also may be a public record.

Elected officials may wish to consider using AP 3-31 as a guide for their own social media use procedures. The Communications Office is charged with administering AP 3-31 and is available for training or guidance for any elected official using social media. Communications has guidelines and procedures for adhering to the State public records law if the need arises to remove comments or postings from a social media account.

As further assistance, the State Library, Archives & Public Records Department provides training and guidance for properly maintaining social media records in accordance with State law (Attachments 3 and 4).

Additionally, Clerk of the Board Robin Brigode is the designated liaison with Arizona Library, Archives and Public Records County's and is charged with administration of the Pima County Records Management Program, as well as fulfilling public records requests. The Clerk's office also is available for guidance and training on how to properly follow the State's Public Records Law.

CHH/mjk

Attachments

c: Robin Brigode, Clerk of the Board
Jan Leshner, Deputy County Administrator for Community and Health Services
Mark B. Evans, Public Communications Manager

ATTACHMENT 1



PIMA COUNTY, ARIZONA
BOARD OF SUPERVISORS POLICY

<u>Subject:</u> Social Media	Policy Number	Page
	D 33.2	1 of 1

Policy

Pima County recognizes the vital importance of participating in social media/social networking communication and is committed to ensuring that the County participates and listens in meaningful ways.

Pima County shall endeavor to:

- Publish, engage and provide customer service with relevant, timely and actionable information, while promoting core services and key events.
- Establish our voice to build confidence that we are a trusted source for information, especially during emergencies.
- Use social media aggressively during emergencies and emerging incidents to empower information ambassadors, listen to community first informers and share critical information.
- Listen to input about government services and programs.
- Participate in individual, neighborhood, local, regional, state and/or national conversations.
- Ensure the security of our social media accounts.

It is therefore the policy of the Board of Supervisors that all Appointing Authorities, and Department Directors require their departments/divisions to adhere to the requirements outlined by the Administrative Procedure developed for Social Media. Elected officials are exempt from this policy. Pima County elected officials shall, however, maintain all social media in accordance with all public records retention and production laws, regulations and requirements.

Applicability

This policy applies to all Pima County departments and boards, commissions and/or committees established by the Board of Supervisors, volunteers and interns.

Adoption Date: November 10, 2015
Effective Date: November 10, 2015

ATTACHMENT 2



ADMINISTRATIVE PROCEDURES

Procedure Number: 3-31Effective Date: 04/06/2012

Revision Date: _____

C. D. [Signature]
County Administrator

SUBJECT: Pima County Social Media Procedure

DEPARTMENT RESPONSIBLE: All County Departments

I. PURPOSE

This document contains the Pima County procedure on department use of social media sites such as Facebook and Twitter. It includes guidelines for setting up and managing social media pages for the distribution of official government content.

Additionally, these guidelines address our responsibilities relating to public records, protection of free speech, and information privacy and security – all very important issues and unique to government entities in this new medium of social networking.

II. DEFINITIONS

Social Media: A term for the tools and platforms people use to create community online by publishing, conversing and sharing information. The tools include forums, message boards, blogs, wikis, podcasts, and sites to share photos and bookmarks. Social media applications include Facebook, Twitter, Google+, and YouTube.

III. ACCEPTABLE USE OF SOCIAL MEDIA

The Procedure is built on the premise that the best and most appropriate Pima County uses of social media tools fall generally into these categories:

- As channels for disseminating time-sensitive information, such as emergency notifications, as quickly as possible.
- As an online channel for services provided face to face.
- As a customer service and feedback resource for your department's service area and role in Pima County.
- As marketing/promotional channels that increase the County's ability to share its message with the broadest possible audience.

County Departments should consider using social media channels to distribute the following classes of information:

- Emergency information
- Event and observance information
- Customer service
- Public service announcements
- Employment
- Public meetings
- News and information
- Community or neighborhood-specific information
- Ways to communicate with elected and management officials

Departments should understand that social media represents a significant commitment of staff time due to the consistency of posting and monitoring required. If a site is not kept up-to-date or monitored, the County may remove it.

IV. SOCIAL MEDIA PROCEDURAL REQUIREMENTS

All departmental requests to create an official social media presence and subsequent account setup decisions are subject to approval of the Pima County Communications Office. These requests should be directed to the Communications Office through the County's Online Service Catalog. Records of all related passwords shall be kept up-to-date at your department [supervisor] and by the Communications Office.

The name of each department's Social Media accounts name should identify the department first and Pima County next, if possible within character limitations. Pima County must be featured prominently in explanatory text areas and the Pima County seal should be used as the profile image.

Each department will be responsible for managing and posting content to its own account(s).

Each department with a social media account must include contact information for use by the public. The account's public information area (ex: Facebook Info section) must state the name of all of the person(s) posting and contact information, such as a phone number or email address.

Each department will designate a manager who will be in charge of monitoring, and at least two individuals (a primary and a back-up) to keep posted information current and to monitor content to assure that it is:

- Accurate
- Spelled properly
- Timely
- Applicable to a wide audience
- Useful or actionable
- Easy to read and understand
- Related to current official County government event, observance, deadline, or matches the same type of services that your department provides when face to face.

All departments with a social media account must designate a salaried employee and a backup to monitor comments posted on their social media site throughout the week and

also on weekends/holidays. All employees assigned to manage and post to social media must attend all appropriate County training sessions.

If a department deems any posts as inappropriate and removes them, it must retain a copy of the comments removed.

Pima.gov remains the County's principle site on the Internet. Whenever possible, content posted to Pima County social media sites should contain links directing users back to the County's main website for in-depth information, forms, documents or online services necessary to conduct business with Pima County. Departments may also provide links on an as-needed basis to grant-funded websites, state agencies and emergency service organizations, as well as your community and programming partners, and useful news related to your subject area.

Comments, mentions, and conversations must be monitored frequently. Responses should be as prompt as possible.

One important goal is that the post be spread by other users to their followers and friends. Observe what messages are passed on the most, or have the most clicks, and consider what made them appealing, urgent, etc.

Departments may make use of third-party software (ex. HootSuite) to manage and coordinate multiple social media sites, but the departments are responsible for any implementation and operational costs. Only employees assigned to manage and post to social media accounts may make use of the social media management software.

Pima County social media sites are subject to State of Arizona public records laws. Any content maintained in a social media format that is related to County business, including a list of subscribers and posted communication, is a public record. The Department maintaining the site is responsible for responding completely and accurately to any public records request for public records on social media. Content related to County business shall be maintained in an accessible format.

Pima County social media site articles and comments containing any of the following forms of content shall not be allowed:

- Comments not topically related to the particular social medium article being commented upon;
- Comments in support of or opposition to political campaigns or ballot measures;
- Profane language or content;
- Content that promotes, fosters, or perpetuates discrimination on the basis of race, creed, color, age, religion, gender, marital status, status with regard to public assistance, national origin, physical or mental disability or sexual orientation;
- Sexual content or links to sexual content;
- Solicitations of commerce;
- Content that reveals private, personal information without permission;
- Photographs that do not conform to the County's Photo Release Policy;
- Conduct or encouragement of illegal activity;
- Information that may tend to compromise the safety or security of the public or public systems; or
- Content that violates a legal ownership interest of any other party.

V. PUBLIC RECORD POSTING REQUIREMENTS

Pima County has a duty to follow Arizona public records laws. Any records Pima County creates or maintains on social networking sites in pursuit of the business of Pima County are most likely public records, which the County must efficiently and effectively manage. In short, whatever the County posts on its social media sites is considered a public record.

State law and relevant County retention schedules apply to social media formats and social media content. Unless otherwise addressed in a specific social media standards document, the Department maintaining a site shall preserve records required to be maintained pursuant to a relevant records retention schedule for the required retention period on a County server in a format that preserves the integrity of the original record and is easily accessible.

ATTACHMENT 3

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*Secretary of State
State of Arizona*



Arizona State Library,
Archives & Public Records

SOCIAL MEDIA RECORDS MANAGEMENT

SESSION 6 OF 7 ON RECORDS MANAGEMENT

This training does not constitute a legal opinion or legal advice on the part of the Library, Archives and Public Records Branch, of the Secretary Of State.

PRESENTER(S)

Jerry Lucente-Kirkpatrick

Records Analyst

(RM Training; Retention Schedules and Imaging – Local Agencies)

Archives and Records Management Branch

And

Melanie Sturgeon

State Archivist

Archives and Records Management

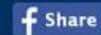
Library, Archives and Public Records

Arizona Secretary of State

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of an Arizona Invention

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01

We're Closed Labor Day

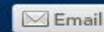
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RECORDS MANAGEMENT CENTER WEBSITE

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Archives and Records Management

The State Archives, located in the Polly Rosenbaum Archives and History Building, collects preserves and makes available to the public and all branches of government, permanent public records, historical manuscripts, photographs and other materials that contribute to the understanding of Arizona history. The Records Management Center administers the management of public records throughout state and local government in Arizona.



Archival Research Materials

Archives and Records Management

[Research at the Archives](#)

[Records Center Services](#)

[Retention Schedules, Standards, Forms and Guidance](#)

[Accessing Arizona Public Records](#)

[Conservation, Disaster Preparedness and Emergency Recovery](#)

[Programs, Training, and Presentations](#)

[Archives and Records Management Policies](#)

[Contact the State Archives and Records Management Center](#)

We're here to help

Arizona State Archives
602-926-3720
[Email](#)

Records Management
602-926-3815

PRE-SESSION QUIZ

1. Does your Public Body use Social Media?
 - If yes, why?
 - If no, why not?
2. Is your Public Body Facebook page a record?
 - If yes, why?
 - If no, why not?
3. What are the three biggest benefits of social media for your public Body?
4. What do you think are the three biggest challenges with managing social media?

PRE-SESSION QUIZ

5. Is your Public Body currently managing its social media content?
 - If yes, who is doing this?
 - If yes, how is it doing this?

6. Are there RM risks to social media?
 - If yes, what are some of them?

7. Is your Public Body currently providing employee training on social media?

8. Does your Public Body have a Social Media Policy?

9. Given all the problems with managing social media, should your Public Body NOT be on social media?

SOCIAL MEDIA

- Facebook
- LinkedIn
- Twitter
- YouTube
- Google
- Skype
- GovLoop
- and many more



QUESTION #2: IS SOCIAL MEDIA A “RECORD”?

41-151.18. Definition of records

In this article, unless the context otherwise requires:

- **"records"** means all books, papers, maps, photographs or other documentary materials,
- **Regardless of physical form or characteristics,**
- **Made or received by any governmental agency** in pursuance of law or in connection with the transaction of public business
- **As evidence of the organization, functions, policies, decisions, procedures, operations or other activities of the government, or because of the informational and historical value of data contained in the record,** and includes records that are made confidential by statute.

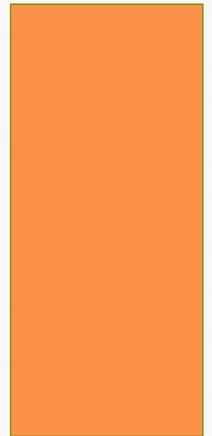
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QUESTION #3: BENEFITS OF SOCIAL MEDIA: WHY, WHO, WHERE

SESSION 6 OF 7 ON RECORDS MANAGEMENT



QUESTION #3: BENEFITS OF SOCIAL MEDIA

Social media is diversifying, but **FACEBOOK STILL DOMINATES.**

71%
OF ONLINE
ADULTS
USE FACEBOOK



FACEBOOK

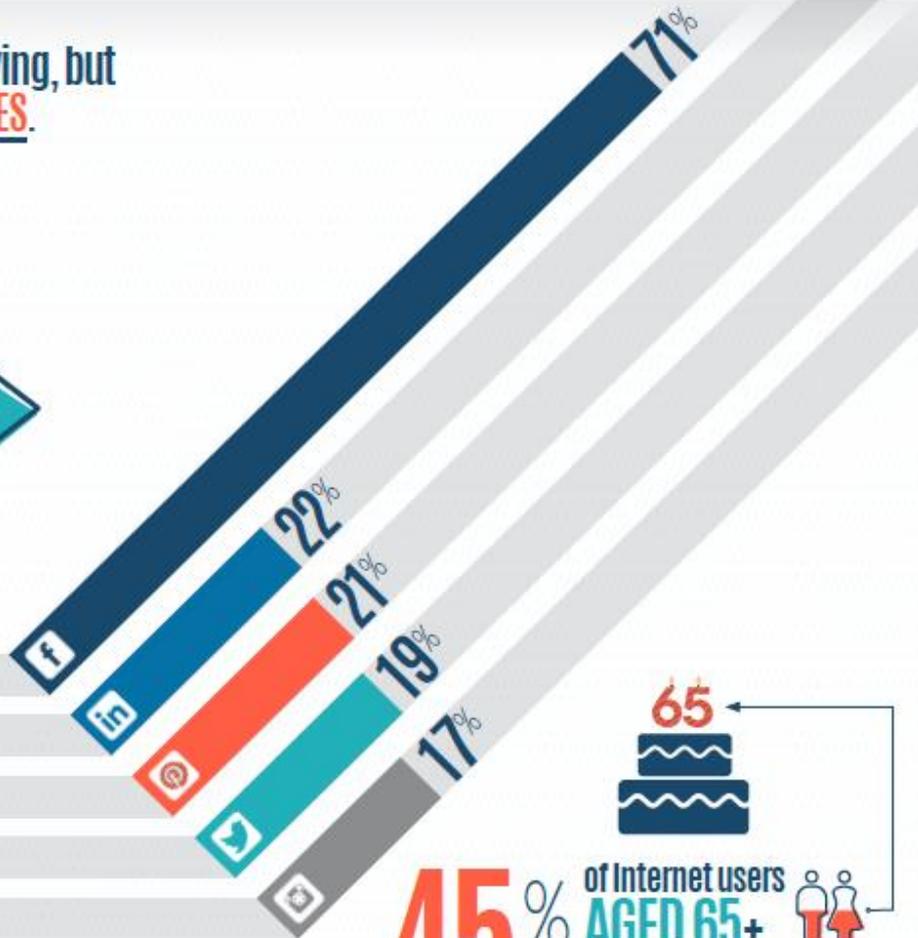
LINKEDIN

PINTEREST

TWITTER

INSTAGRAM⁵

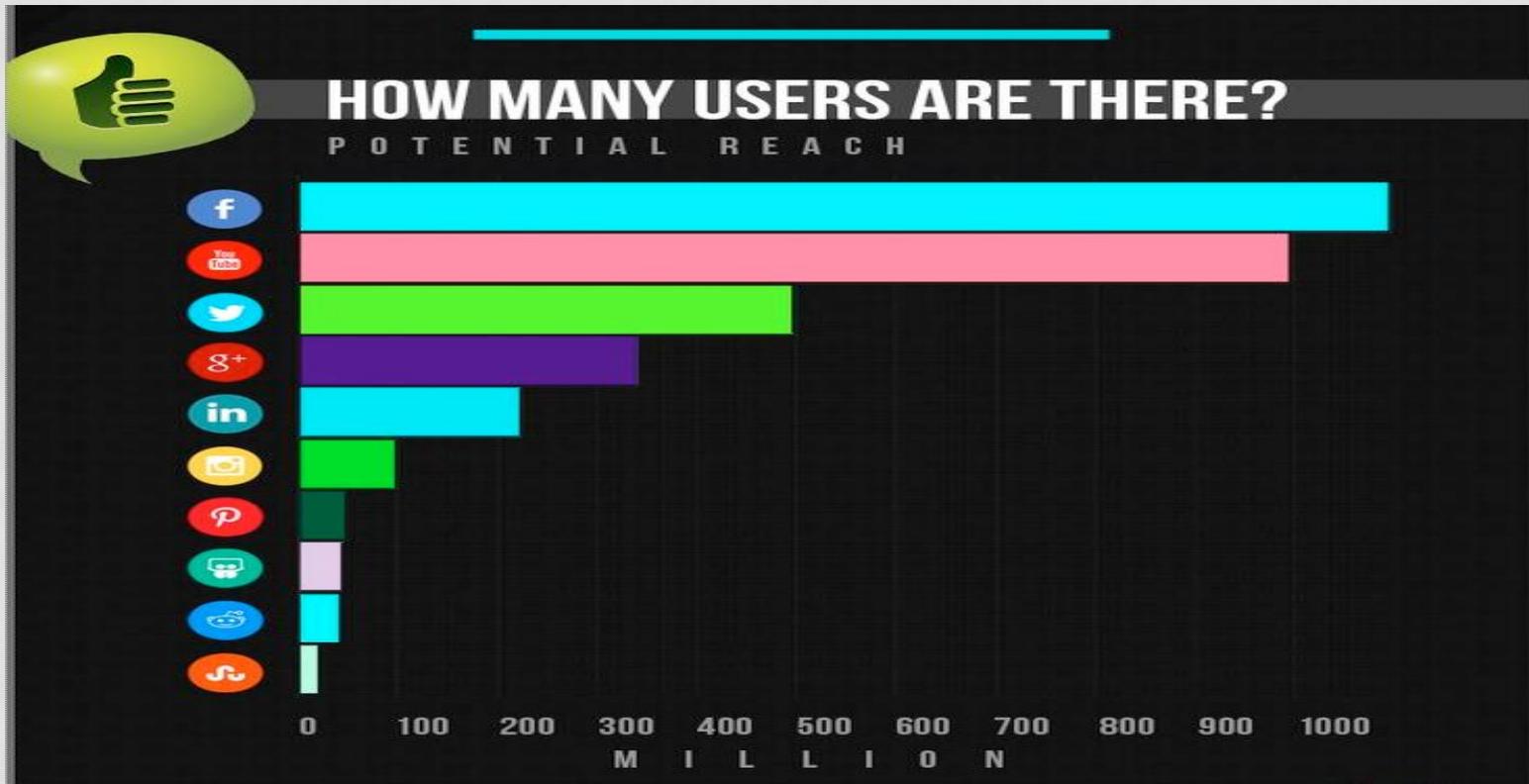
Social media ISN'T JUST FOR MILLENNIALS:



45% of Internet users
AGED 65+
USE FACEBOOK.⁶

WHERE DOES YOUR AUDIENCE “HANG OUT” ?

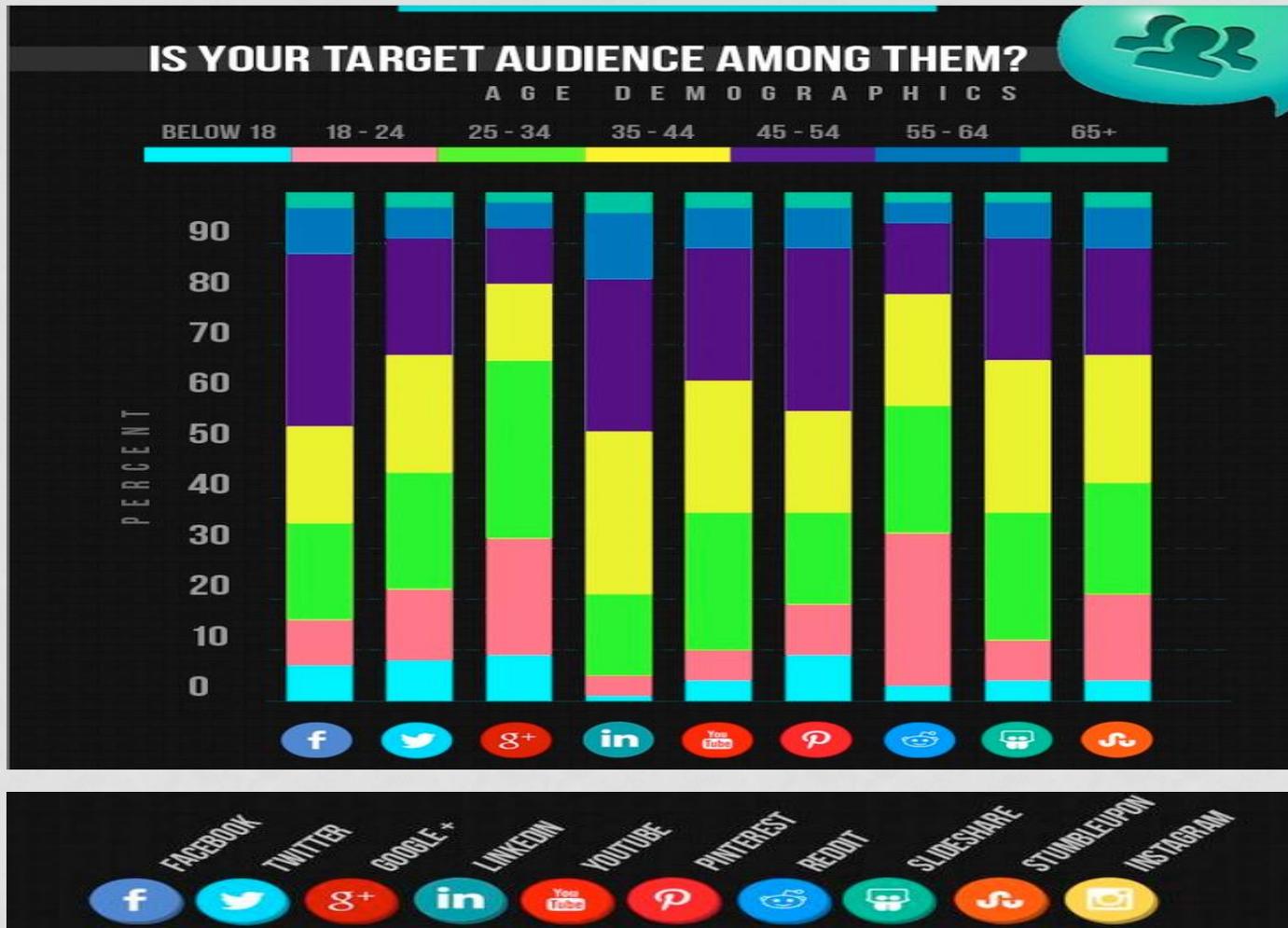
THE NUMBERS GAME?



<http://pinterest.com/pin/112097478197769776>

WHERE DOES YOUR AUDIENCE “HANG OUT”?

AGE IS A FACTOR



<http://pinterest.com/pin/112097478197769776/>

PRIMARY USES OF SOCIAL MEDIA BY GOVERNMENT

Share

Inform citizens of public services through social content
(result: increased access to information)

Listen

Observe, analyze and understand what citizens are sharing
(result: improved customer service)

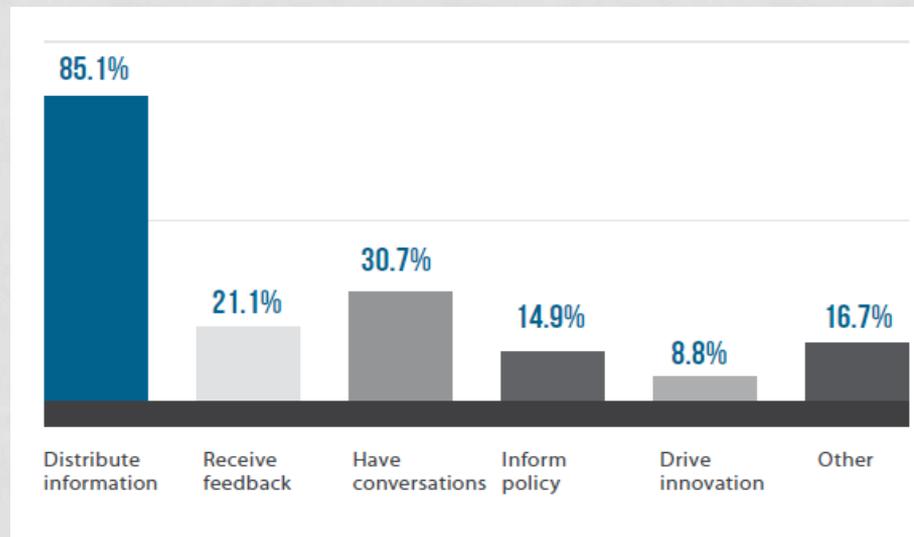
Engage

Respond, collaborate and create with citizens to improve public services
(involve the community directly in government decision making)

BENEFITS OF SOCIAL MEDIA FOR PUBLIC BODIES

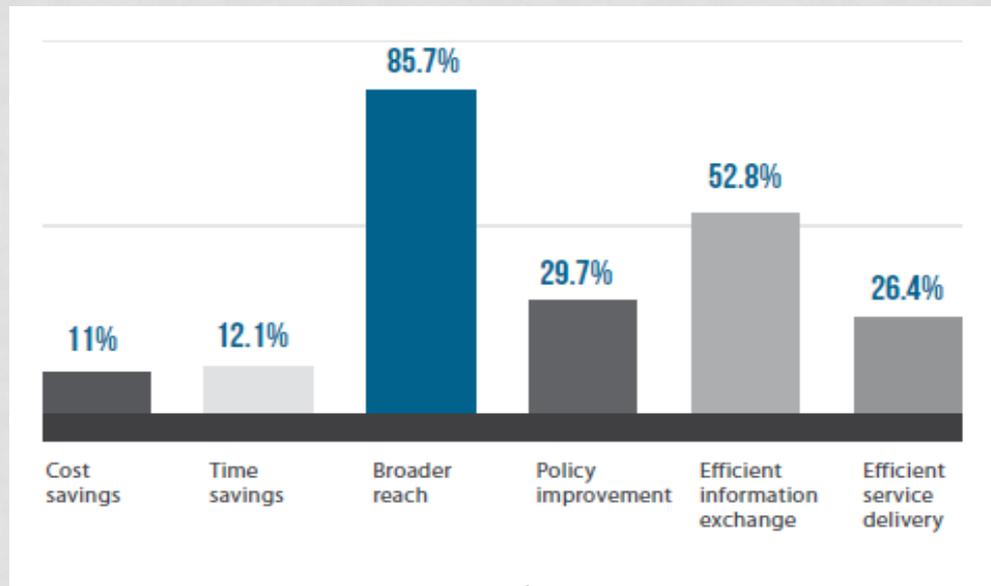
- Provide greater transparency
- Reach citizens where they are (online)
- Provide easier access to services and information for citizens
- Save time
 - word of mouth advertising
 - allowing citizens to answer questions for one another)
- Save money (otherwise spent on print materials and phone calls)

PRIMARY OBJECTIVE IN USING SOCIAL MEDIA



Results of GovLoop survey with 100 respondents from federal, state, city, and county governments. Source: GovLoop “The Social Media Experiment in Social Media: Elements of Excellence.”

DEMONSTRABLE MISSION IMPACT



Results of GovLoop survey with 100 respondents from federal, state, city, and county governments. Source: GovLoop “The Social Media Experiment in Social Media: Elements of Excellence.”

WHAT GOVERNMENT DIVISIONS ARE USING SOCIAL MEDIA?

WHAT FUNCTIONAL AREA IN YOUR ORGANIZATION USES SOCIAL MEDIA?

FUNCTION	%
Communications / Public Affairs	80.7%
Emergency Management / Fire / Police	34.9%
Parks and Recreation	25.7%
Community Planning	22.9%
Public Works	22.9%
Health and/or Human Services	21.1%
Economic Development	19.3%
Environmental Protection / Services	19.3%
Transportation	17.4%
Budgeting / Finance	11.0%
Acquisition / Contracting	8.3%
Property Management	3.7%
Other	16.5%

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QUESTION #4: WHAT ARE SOME OF THE CHALLENGES OF SOCIAL MEDIA

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THE “PLACE” OF PUBLIC RECORDS

Why Mix Social Media and
Records Management?

Isn't Inherent Transparency of Social Media
Enough?

Are Openness and Transparency the only
responsibilities of Government?

DUTIES OF ALL PUBLIC BODIES AND EMPLOYEES FOR RETENTION & PRESERVATION

Establish and maintain an active, continuing program for the economical and efficient management of the public records of the agency.

ARS 41-151.14(A)(1)

WHO IS MANAGING ALL THAT STUFF?

Questions to think about:

- What is the difference between **data and records**?
- Whose “**responsibility**” is it to provide Records Management service to their customers?
- Who is in the **best position to “manage”** electronic records?
- Is the creator of the content / record?
- Or, is the “post-er” of the content / record?
- Why do these questions matter?

RM QUESTIONS FOR CONTENT MANAGEMENT

Important RM Concept for all forms of Electronic Communication:

- **Is Content in Communication a Copy?**
- Is that content (of original not copy) **being retained and managed** (from RM perspective) elsewhere?
- **Is Content Unique information?**
- Is Unique Content **being retained and managed** (from RM perspective)?
- **Why do these questions matter?**

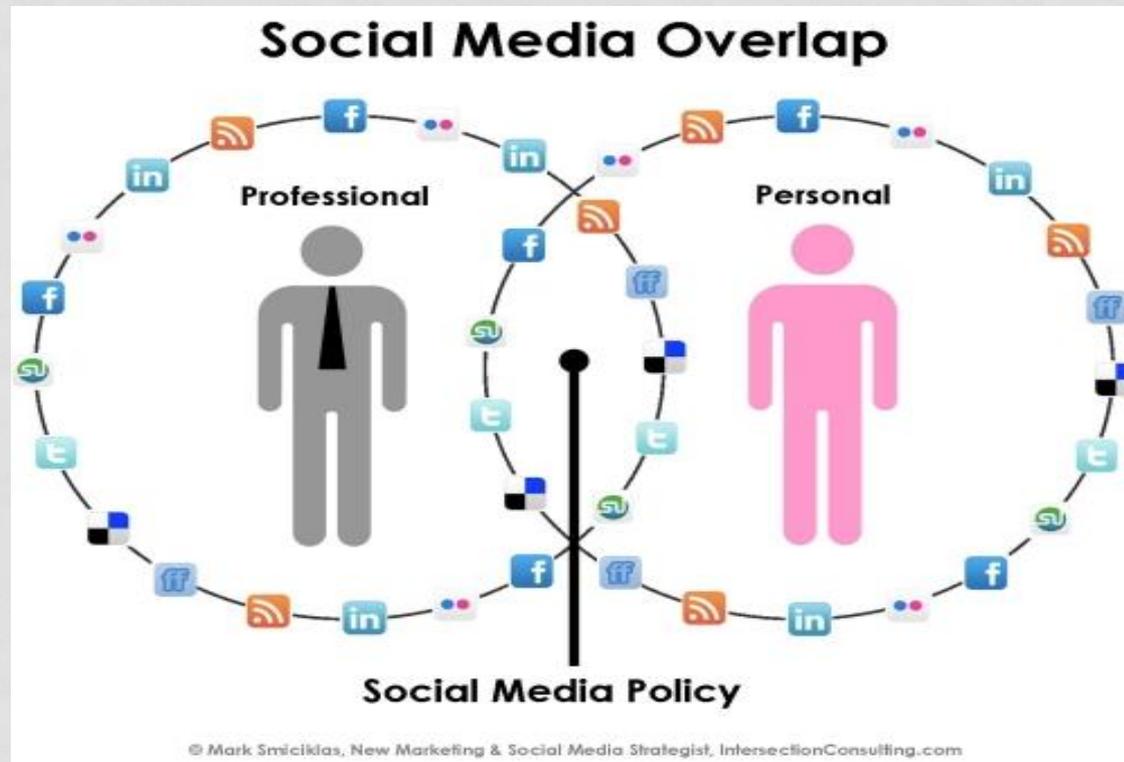
WHEN IS SOCIAL MEDIA NOT SO SOCIAL?

Challenges with Social Media Records:

- A.R.S. require we (government) control (manage) our records during their entire retention period.
- Social Media sites provide little to no tools to help manage YOUR records on THEIR sites.
- Who controls the content on Social Media sites?

= Challenges to compliance with RM Statutes.

SOCIAL MEDIA OVERLAP



SOCIAL MEDIA VIRGINS BEWARE!

1. If You Post it, You Own It

- Whatever content / records government bodies post to Social Media sites **belongs** to the public body and **NOT** to the Social Media site - from a Records Management point-of-view.

2. If You Own It, You Manage It

- If you post something to any Social Media site, and the posting (words, pics, video, etc.) is work-related, then you have a statutory responsibility to retain the posted information for the approved & correct retention period.

- Link to *Social Media Records Retention Schedule*:

- <http://www.azlibrary.gov/records/documents/pdf/all%20-%20email.pdf>

3. If You Created It, You Own It

- The **Creator of any content** being posted to social media sites (or other websites) needs to be **responsible for the proper retention** of the content they created.

YOU'VE GOT THE POWER - AT LEAST SOME



4. Unique vs. Copy

- **Copies Are Not Records.** As such, copies do not need to be managed.
- **Avoid posting any unique or original content** to social media sites. Post only copies of information being managed elsewhere by a specific person responsible for its retention. This is especially grievous with **Videos** posted to YouTube, and the like.

5. “Blogs and Wall Posts, Oh My!”

- These are the two most likely areas for Unique content that will need to be managed.

6. Email All Wall Posts

- Make sure you set up your social media site to generate an email to your designated email account (ex. records@azlibrary.gov) **whenever anyone posts a comment to your wall.** You can then manage that email for retention since you cannot manage the retention on your social media site.

SOCIAL MEDIA CHALLENGES (ARCHIVESOCIAL GRAPHIC)

CHALLENGES OF MANAGING SOCIAL MEDIA

Despite the growing use of social media in the public sector, it is still relatively new and **GOVERNMENTS ARE CHALLENGED BY:**

LIMITED RESOURCES (staffing, etc.):



There is a retirement wave hitting government agencies:

**NEARLY HALF OF
STATE WORKERS
ARE BETWEEN** **45-64** **YEARS OLD**

LACK OF POLICY:

JUST OVER HALF OF STATE GOVERNMENTS
have policy language in place governing personal use of social media by state employees.¹⁷

PUBLIC RECORDS REQUESTS (ARCHIVESOCIAL GRAPHIC)

RECORDS MANAGEMENT (open records requests, etc.):

On average,
**AGENCIES
SPEND** **260** **MINUTES**
per day meeting public records requests.¹⁷

 - 5 minutes



MANAGING ELECTED OFFICIALS' ACCOUNTS:

48 % of Americans keep up on
POLITICS USING
FACEBOOKTM



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WHAT RECORDS MANAGERS NEED TO KNOW ABOUT SOCIAL MEDIA

SESSION 6 OF 7 ON RECORDS MANAGEMENT



WHAT'S THE ROI ON RECORDS MANAGEMENT?

The **benefits** of having a **good Records Management Program** in place:

Financial Benefits:

- ❖ Save money and resources previously being spent on storing records
(physical floor space, server space, off-site storage):
- ❖ Save money and resources for records no longer needed:
 - ❖ spent in searching for, retrieving, copying, producing or redacting records in response to requests

Risk Management Benefits:

- ❖ If you have the information, you need to provide it for Public Records Request, Audit, Investigation, Litigation
- ❖ If you don't have the information because you destroyed it per a Retention Schedule, you are legally OK.
 - ❖ Caveat: records were not destroyed in the face of a Public Records Request, Audit, Government Investigation or Litigation.

Process Improvement

- ❖ Incorporating Records Management into document workflows
- ❖ Converting paper records into move usable electronic formats
- ❖ Properly indexing electronic records for easier retrieval
- ❖ Consolidating physical records into one convenient location with better shelving and storage

OVERVIEW OF WHAT RM NEEDS TO KNOW

- **Become familiar** with Social Media
- Understand the **value to the organization** and subunits
- Become involved from the start (RIM reference should be in every social media policy)
- Set **strategic plan** to handle social media records
 - both static and dynamic,
 - including the people, objectives, strategies and technologies
- Be sure provisions are made **for transfer or in place preservation**
- Continue to audit results and evaluate processes
- **Update your plan** as necessary
- Scan the horizon for **the next new technology** that results in records that must also be captured and managed—It's sure to come

IF ANSWER IS YES TO ANY OF THE FOLLOWING, YOUR SOCIAL MEDIA MUST BE SUPPORTED BY RECORDKEEPING FRAMEWORK

- Is a high risk or strategic business moving to (using) social media?
- Are business or client management decisions being made or communicated via social media?
- Are internal processes that were formerly supported by defined processes or workflows now moving to social media?
- Will clients rely on information posted to social channels?
- Will corporate reporting or accountabilities rely on the information posted to social media?
- Will any of the content being used on social media channels be reused?

DEVELOP A DEFENSIBLE RIM PROGRAM

- Create and implement a records and information management (RIM) program.
- Consider legal retention requirements ‘before’ implementing social media initiatives.
- Publically state you will be capturing and keeping social media information you need to support your operations.
- Periodically delete ESI (Electronically Stored Information) according to your “formal” retention policy.
- Enforce, evaluate, and update your Social Media and Records & Information Management polices and practices.

TO IMPLEMENT SOCIAL MEDIA RECORDKEEPING

- Understand the specific risks that apply to social media
- Know what the organization is doing with social media
- Develop a social media information strategy
- Support social media use with a policy that supports recordkeeping
- Be proactive
- Keep abreast of emerging trends in social media systems and use
- Patricia C. Franks, PhD, CRM (From presentation to NAGARA - Indianapolis, given on July 12, 2013)

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State of Arizona*



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YOUR SOCIAL MEDIA RM ARSENAL

SESSION 6 OF 7 ON RECORDS MANAGEMENT



SOCIAL MEDIA SOLUTION: A POLICY, A MATRIX, AND A PRACTICE (RM)

Components of a Fully Integrated RM Solution to Social Media:

❖ “4 Pillars” of Records Management

Retention Schedules

Policies

Training

Documentation and Auditing

❖ Social Media Matrix

❖ Implementation and execution (enterprise-wide)

❖ Software / Technology Solution

Understanding the Solution?

- ❖ What is required in order to be in compliance?
- ❖ What your solution can and cannot do
- ❖ Need to create a workaround

SOCIAL MEDIA RETENTION PERIODS

Social Media Records managed by content

Public Information and Marketing Records General Retention Schedule:

http://apps.azlibrary.gov/records/general_rs/Public%20Information%20and%20Marketing.pdf

HOW LONG DO WE NEED TO KEEP SOCIAL MEDIA RECORDS?

3 MAIN RETENTION PERIODS

Retention Period: After reference value has been served

Type of Record:

Graphic Art (temporary / minor, draft)

Retention Period: 2 years after calendar year created or received

Type of Records:

Advertising and Outreach Records, Broadcast Logs, Photographs, Press Releases, Public Event Records (including calendar), Public Service Announcements (PSA), Speeches

Historical Records: Permanent. May Transfer to State Archives

Type of Records:

Graphic Art (Final version)

Records of enduring value

SOCIAL MEDIA POLICY...

RECORDS MANAGEMENT PERSPECTIVE

- ❖ State and Understand Why You Are Using Social Media
- ❖ Define the Roles and Responsibilities
- ❖ Determine Who “Owns” the Content
- ❖ “Use the Matrix, Luke”
- ❖ Use the *Terms of Use*
- ❖ Execution, Implementation, Compliance and Auditing

KEY ASPECTS TO YOUR SOCIAL MEDIA POLICY

- **Identifying what constitutes a record** on social media platforms
- Defining ownership of content and **responsibility for managing the records**
- Developing recordkeeping requirements
- Incorporating recordkeeping practices and requirements into Terms of Use
- **Communicating records policies so employees** and the public understand how records will be managed
- Monitoring the **ongoing use of social media platforms** to determine if that use changes the value of the records
- Monitoring any changes to third-party terms of use

SOCIAL MEDIA MATRIX

Overall Goals of the Matrix:

- ❖ Map business (or unit) moving to social media
- ❖ Map information moving to social media
- ❖ Assess your information needs and expectations
- ❖ Assess public accountabilities

QUESTIONING THE MATRIX

Question to ask and answer BEFORE:

- ❖ Why are you using social media?
- ❖ Intended vs Actual audience?
- ❖ Goals?
- ❖ Message?

Information to Capture:

- ❖ Who “owns” the product?
- ❖ Departments / Individuals using Social Media?
- ❖ Sites are they using / links?
- ❖ Access keys?
- ❖ Content?

GO BACK TO THE MATRIX – EXAMPLE OF US GOVERNMENT SOCIAL MEDIA MATRIX

Matrix of Web 2.0 Technology and Government

Technology	Simple Definition	Examples	Opportunity/Potential in Government
Blogs	Journal or diary with social collaboration (comments)	33 federal agencies have public blogs , USA.gov government blog library , Webcontent.gov advice, GovGab.gov	Govt info to new audiences. Puts human face on govt using informal tone. Opens public conversations. Surface issues & solve them.
Wikis	Collaborative authoring & editing	GSA Collab Environment , Core.gov, MAX, NASA , US Courts , Intellipedia, PTO, Diplopedia, PeaceCorps, Utah Politicopia	Workgroup or public collaboration for project management, knowledge sharing, public input. Contributions to 3 rd party sites e.g. Wikipedia
Video Sharing (and Multimedia)	Videos, images, & audio libraries (YouTube, AOLVideo, YahooVideo, tubemogul, heyspread...)	USA.gov Multimedia library , NOAA & NASA YouTube , Coast Guard, CA & VA YouTube Channels , Americorps contest , Tobacco Free Florida contest	Public outreach, education, training, other communication for “connected” and on-line audiences. How To videos & audios to improve service and achieve mission.
Photo-Sharing	Photo libraries	USA.gov fed/state photo libraries , LoC & USGS galleries w Flickr API , EPA contest	Cost savings potential. New audiences. Awareness.
Podcasting	Multimedia content syndicated out for use on iPod TM, Mp3 players & computers	White House , NASA , USA.gov federal podcast library , Webcontent.gov , Peacecorps, Census daily podcasts	More ways to get message out. Build trust with conversational voice. Use for updates, live govt deliberations, emergencies, how-to messages
Virtual Worlds	Simulations of environments & people (Webkinz, Club Penguin, Neopets, Stardoll, Whyville, Second Life, Active Worlds, Kaneva, ProtoSphere, Entropia Universe, uWorld)	NASA, NOAA, CDC in SL & Whyville, VA, Natl Guard, Energy , DoD, National Defense Univ Federal Consortium for Virtual Worlds , Real Life Govt in 2nd Life Google group	Public outreach & other communication for kids and niche Internet audiences. Virtual Town Halls, Education, Training. Ability to bring people together worldwide for meetings, lectures, etc.
Social Networking Sites	Connecting people globally	EPA Facebook group , NASA Colab , USAgov Facebook page, MySpace, LinkedIn	Intranet use to cross internal stovepipes. Cross government coordination. Public communities. Viral impact. Knowledge mgmt. Recruitment. Event announcements.
Syndicated Web Feeds	Automated notifications of frequently updated content (think RSS)	USA.gov Federal RSS Library, NOAAWatch	Do more with RSS, XML/Web feeds. Expand reach. Pull content together across government. Authoritative source. Reduce duplication.
Mashups	Combine content from multiple sources for an integrated experience	USA Search , USGS, NASA, EPA, Virtual Earth , Google Earth , Google maps	Lots of potential. Improved govt reach, service, usefulness, and functionality. Integrate external data. Get licenses, stay vendor neutral. Make content available to others who create mashups
Widgets, Gadgets, Pipes	Small applications & code in Web pages or for desktop use	FBI widgets , Veterans Affairs, Census Population Clock & NASA Planet Discoveries Desktop widgets	Increase awareness, use, and usefulness of .gov sites, information, and service. Bring content to the user’s home page (iGoogle, netvibes, etc)
Social Bookmark & News (Sharing, Tagging) Sites	Ways of sharing content with others	USA.gov , NASA , Govt blogs , Digg , Delicious Technorati AddThis	Increase the popularity and use of .gov pages, information, and services. Viral marketing.
Micro-blogging. Presence Networks.	Form of blogging which allows brief (Instant Message size) text updates.	Twitter, Jaiku, Cromple, Pownce, NASA Edge, USA.gov, GovGab, Univ of Mich	Seek input. Broadcast msgs: emergencies, news, announcements. Real time reportg. Recruitg.

MATRIX TEMPLATE

SOCIAL MEDIA MATRIX

TECHNOLOGY	LINK TO	WHAT IS THE MESSAGE?	DEPARTMENT	WHO IS AUTHOR?	USERNAME	PASSWORD	FREQ.
Facebook	www._____	Current Events	Parks and Recs	Jane Smith	janeparks	playground15	Weekly
Blog	www._____	City Technology	I.T.	Jim Jones	JimCIO	ivegotthepower	Weekly
Twitter	www._____	Public Safety	Police Department	Capt. Willams	captsafety	gotyoucovered	Hourly
Twitter	www._____	Traffic Problems	Transportation	Betty White	BettyWhite	lifeisahighway	Hourly

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VERIFYING YOUR MUNICIPALITY'S SOCIAL MEDIA ACCOUNTS

SESSION 6 OF 7 ON RECORDS MANAGEMENT



WHY VERIFY YOUR MUNICIPALITY'S SOCIAL MEDIA SITES?

1. Verification ensure the public we are who we say we are
2. More important now than ever: thousands of government pages on social media and more all the time
3. Impersonation and Parody accounts are common
4. Fake accounts can create confusion and chaos
Examples: Baltimore riots saw as many as 100 fake government accounts
Hurricane Sandy impersonation accounts gave misleading information
5. Fake accounts can hijack your message
6. Verify NOW and not later – after an emergency, problem

HOW TO VERIFY FACEBOOK ACCOUNTS



English (US)

Can I request that my Page or profile be verified?

Right now, we're only accepting [verification](#) requests from Pages that represent celebrities, public figures, sports teams, media and entertainment. To submit a request, make sure you're logged into Facebook and fill out [this form](#). Please keep in mind that most Pages and profiles, including local businesses, aren't eligible for verification.

If your Page or profile isn't verified, there are other ways to help the people who like your Page or your followers know that you're authentic. For example, you can:

- [Link to your Facebook Page or profile from your official website](#)
- Complete the **About** section of your [Page](#) or [profile](#) to provide more information

If you see an account that's impersonating you, your business or your brand, [learn how to report it](#).

More info
[Get help for mobile apps and browsers](#) ▶

Last edited about 3 months ago

Was this answer helpful? [Yes](#) · [No](#) [Permalink](#) · [Share](#)

<https://www.facebook.com/help/100168986860974>

HOW TO VERIFY TWITTER ACCOUNTS

THE BASICS

Verification on Twitter

Verified accounts

Twitter proactively verifies accounts on a regular basis to make it easier for users to find who they're looking for. We concentrate on highly sought users in music, television, government, politics, religion, journalism, fashion, media, advertising, business and other categories where people might be highly visible. We verify qualified business partners and individuals who are at high risk of impersonation, such as celebrities and politicians.

Verification makes it clear to our users, and others on the Internet who can view your Twitter feed, that the Tweets being posted to your account are really coming from you. When you're verified, we put a blue badge with a check mark next to your @username. All accounts with this badge have been checked and authenticated by Twitter.

To be considered

- The Twitter accounts you request verification for must be connected to a company domain email address.
- The account must be actively tweeting and have a complete profile, including the user's real name, bio, photo and a URL link.

Please note

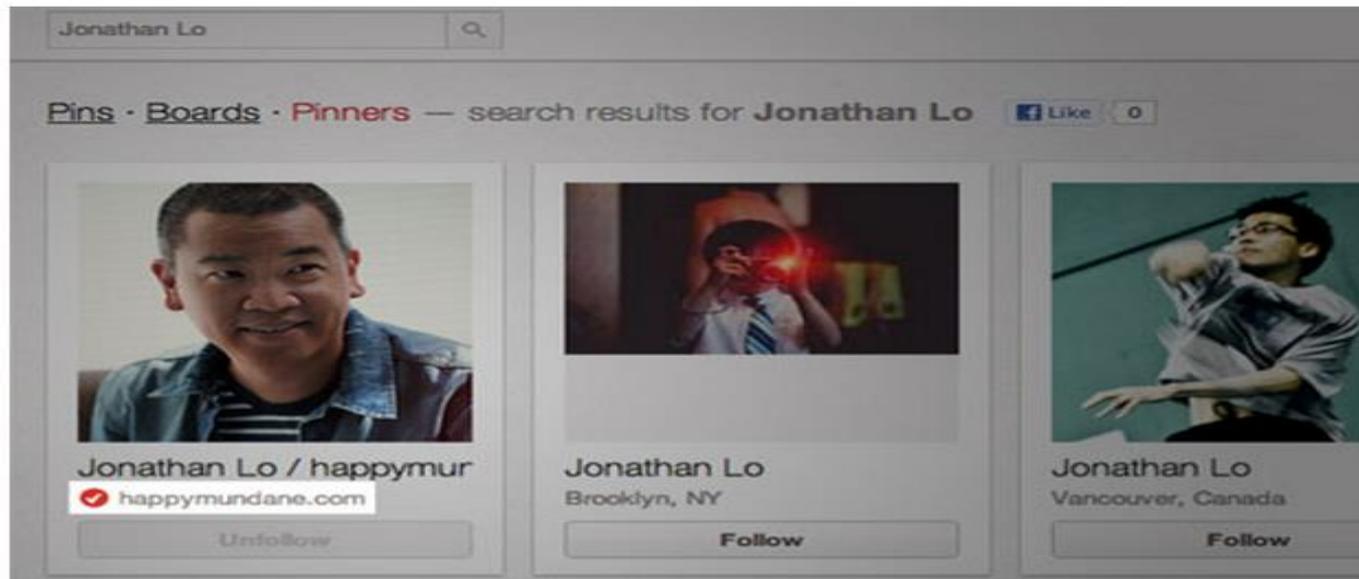
Twitter currently does not accept applications for verification. If we identify your account as being eligible, we will reach out to you to start the verification process.

<https://media.twitter.com/best-practice/how-to-get-verified>

HOW TO VERIFY PINTEREST ACCOUNTS

How to Verify Your Account

Pinterest's verification feature lets you validate that you own the website listed on your Pinterest profile.



To verify your website, visit your Settings page and click on the Verify Website button. Pinterest supports only top-level domains, but you can send suggestions on alternative verification options [using this Google Docs Spreadsheet](#).

Pinterest will ask you to download a HTML verification file and upload it to your Web server. Once Pinterest [verifies your website](#), other Pinterest users will see a checkmark next to your domain in search results and the full website URL and checkmark on your profile.

FEDERAL GOVERNMENT VERIFICATION TOOL – NICE TO HAVE A MUNICIPALITY EQUIVALENT?



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[Home](#) > [Connect with Government](#) > [Verify U.S. Federal Government Social Media Accounts](#)

Verify U.S. Federal Government Social Media Accounts

Contact Us

- [E-mail Your Question](#)
- [Chat](#)
- [Phone](#)

Share: [Facebook](#) [Twitter](#)

The government uses social media tools like Twitter, Facebook and YouTube to connect with people and communicate official information, so it's important to know if a social media account is really managed by the federal government.

This tool lets you verify if a social media account is managed by the U.S. federal government.

You can look up accounts managed by federal agencies, elected officials, heads of agencies or members of the President's Cabinet.

To see if a social media account is managed by the U.S. federal government, please paste its complete URL here:

Example: <http://twitter.com/whitehouse>

Types of accounts we can verify:

- Blip
- Disqus
- Facebook
- Flickr
- Foursquare
- Github
- Google+
- IdeaScale
- LinkedIn

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LEGAL CHALLENGES OF SOCIAL MEDIA FOR MUNICIPALITIES

SESSION 6 OF 7 ON RECORDS MANAGEMENT



RISK COMPONENT – TERMS OF USE (TOFU) CONTRACTS

Problem – If you want to use the Social Media site you Agree!

- Employee mindset toward setting up Social Media account is trained by their own personal use of Social Media
- We have been trained by previous use to “Click to Agree” to Terms and Conditions – but **this is a CONTRACT**
- **Contract between Public Body and Social Media site** very likely to be established by employee NOT Lawyer or Procurement professional
 - Employee likely did not even scroll through TofU to review for acceptability
 - If they did, they probably would not know what is significant, what is in violation of Public Body procurement policies & practices, etc.

FACEBOOK – CALIFORNIA IS JURISDICTION

- If you (or your employees) click “Accept” – **Your Public Body** Agrees to:
 - You agree to handle any legal challenges in California
 - Santa Clara County
 - California State Laws apply
 - Agree to limit Indemnity
 - Are your Public Body Attorneys licensed in California?
 - What You Lose – Your right to **handle dispute in Arizona**

SUCCESSSES FROM STATE & MUNICIPAL PARTNERSHIP - NEW FACEBOOK TOFU FOR PUBLIC BODIES

New Option for 2011

State and Local Government Exception – What You Get

- **Strikes Jurisdiction / venue in CA**
- **Strikes Application of CA Law**
- **Strikes the indemnity clause except to the extent indemnity is allowed by a state's constitution or law**
- **Encourage amicable resolution between public entities and Facebook over any disputes**

FACEBOOK GOVERNMENT EXCEPTION – HOW TO GET IT

- State and Local Government Exception Applies **ONLY IF:**
 - **Select “Community / Government” Designation**
 - **MUST Link Facebook page to your Government website**
 - **Do NOT click “Education” or “Organization”**
 - **If you opened Facebook page before 2011 – MUST change page to “Government”**

ADDITIONAL LEGAL CHALLENGES OF SOCIAL MEDIA

- Harassment
- Defamation
- Copyright/Trademark infringements
- Breach of Confidentiality
- Endorsement Advertising Violations
- Recordkeeping

SOCIAL MEDIA COURT CASE (ONLINE PERSONNA)

Eagle v. Morgan, 2013-11-4303 (E.D. Pa. 2013)

One of the first trials on the issue of **who owns social media accounts**:

The individual **Employee** who first **created** the account?

Or the **Employer** whose business was promoted using the account?

The U.S. District Court for the Eastern District of Pennsylvania held that **an employer's conduct, absent a company social media policy**, resulted in the torts of unauthorized use of name, invasion of privacy by misappropriation and misappropriation of publicity.

“ONLINE PERSONNA” COURT CASE (CONTINUED)

The employer may have prevailed *if it had implemented a social media policy* that covered factors relevant to ownership, such as whether:

- (1) the employer paid the social media account fees;
- (2) the employer dictated the precise contents of the employee's account;
- (3) the employee acted expressly on behalf of the employer due to their position, role or responsibility; or
- (4) the social media account was developed and built through investment of the employer's time and resources.

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SPECIFIC PROBLEM AREAS

SESSION 6 OF 7 ON RECORDS MANAGEMENT



1. BEWARE “EXECUTIVE COMMUNICATION” AND SOCIAL MEDIA

Beware “Executive Correspondence” in Social Media

- Executive Correspondence is a **Permanent** record if it “sets or discusses policy”.
- **Any communication / correspondence** that either discusses or sets policy, and takes place in any “physical form or characteristic” (ARS §41-1350), involving an executive (any Board, Commission or Council member, an Agency Director, elected official, County / Department / Division Leadership) will meet the definition of “Executive Correspondence”.
- Since Policies are Permanent, then executive discussions of Policies become important Permanent records to help provide context to the Policy(ies).
- **Where** this discussion takes place does not matter: could be on paper, on a website, in an email, on Social Media, in a blog, in a shared workspace, definitely in Sire, etc.
- This specific records series is from the *Management Records* General Retention Schedules

Why is this a challenge?

2. BEWARE OF HISTORICAL RECORDS

If a record is historically significant, it is a permanent record.

**Permanent Records are of interest to the State Archives and future researchers.

Records are deemed **historically significant** records when they:

- Document a **controversial issue**
- Document a program, project, event or issue that **results in a significant change that affects** the local community, city, county or state
- Document a program, project, event or issue that **involves prominent people, places or events**
- Document a program, project, event or issue that **resulted in media attention** locally, statewide or nationally

Why is this a challenge?

3. ELECTED OFFICIALS AND SOCIAL MEDIA

- Avoid “cleaning house” to make room for the newly elected official.
- Include both in-house and vendor / media produced
- Controversial Topics / Topics of Interest (prev. 2 slides)
- What records on Social Media will be of interest to the State Archives and the future:
 - Videos / Tweets / Media attention specifically involving the elected official
 - Inauguration
 - Speeches / Statements
 - Letters / Proclamations
 - Press Releases
 - Significant Events
 - Photos
 - Bio Statements
 - Involving Core Values / Duties of Office

4. VIDEO AS RECORD / PERMANENT RECORD

Videos and Tweets: Your website, YouTube, FaceBook, Twitter, etc

- **Make sure your only copy of the video / tweet is NOT online @ Social Media site.**

What types of videos / tweets would be of interest:

- Involving Core Values / Duties of Office
- Deal with controversial topics and/or topics of interest – You will recognize many of these issues, especially if you suddenly get a large number of letters, calls or e-mails on a hot topic:
 - in **opposition** to an issue
 - in **support** of an issue
 - expressing a concern**
- **Examples of Current / Recent Issues**
Abortion, Alternative fuels, Environmental issues, Fiscal concerns, Forests, wildfires and forest management, Gambling / casinos, Gas prices, Gay rights, Gun control, Freeways or highways, Illegal immigration, Land and development issues, Legalization of drugs, Legislation (involving your Agency), Important landmarks (if you still have correspondence), Terrorism/terrorists, Water issues, Welfare issues (for or against)

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LIMITED RETENTION TOOLS AVAILABLE FROM SITES

SESSION 6 OF 7 ON RECORDS MANAGEMENT



SOCIAL MEDIA TOOLS FOR CAPTURING CONTENT - WARNING

- The following slides present free options for downloading and saving content from social media sites. We are not promoting these sites, we are not approving these sites, but we are bringing to your attention the fact that there are some free tools available to help with social media content.
- Some social media sites now provide built-in “archiving” tools that will help you capture the content in a location outside of the social media site.
- Most of these tools are NOT RM approved tools, because they don’t have any retention capabilities, but merely a way of grabbing and saving content.
- These may not provide a legally defensible audit trail in court, so choosing between the tools requires a critical analysis, and may require additional technology layers.
- Since Facebook and Twitter did not initially provide archiving tools themselves, some other third-party applications have popped up to perform the task.

CAPTURING BLOGS

- If the blog does not contain comments, **the blog posts can be captured and saved to a content management system** before they are uploaded to the site.
- If the blog does contain comments, **an RSS feed can be used to capture comments and forward them to the organization.**
 - Some organizations use a sampling technique to capture some but not all of the comments made by visitors to the blog.
- If the entire blog, not individual posts, risers to the level of a record, **the entire blog site can be captured in the same way a website is captured.**
 - See RM Session 5 on Electronic Records

DOWNLOADING FACEBOOK INFORMATION – FROM FACEBOOK

How can I download my information from Facebook?

- You can download your information from your settings. To download your information:
- Click at the top right of any Facebook page and select **Settings**
- Click **Download a copy of your Facebook data** below your General Account Settings
- Click **Start My Archive**
- Because this download contains your Timeline information, you should keep it secure and be careful when storing, sending or uploading it to any other services.

Can I pick and choose which information I would like to download?

- Unfortunately, there's no way to individually select which data you would like to download when you download your Facebook info. You'll have to download your file in its entirety.

Here is a link to information on “archiving” your Facebook information, which actually comes from Facebook.

- <https://www.facebook.com/help/131112897028467>

SAVING GOOGLE+ CONTENT

Google+

- Google Takeout is the official way to backup information from Google+ and other Google services like YouTube or Picasa.
- Visit [Google Takeout](#).
- By default, All of Your Data is selected but you can click Choose Services if you only want your Google+ stuff. Either way, choose what you want to backup and click the Create Archive button.
- Takeout will then start compiling all the information into a ZIP file you can download. If you don't want to wait – for me it took less than a minute, but I don't have many files in Google Drive or Picasa – you can just check the box that says “Email me when ready.”
- Once the ZIP file is ready, click the Download button.
- Even if you're already logged in, you'll need to enter your Google account password, after which you'll need to click the Download button again before the download will begin.
- Frankly, it works great. The ZIP file is very logically organized and the files are named very clearly in it. My only complaint is that not many non-techies are going to know how to get information out of the JSON files exported from Google Profile and Google Reader, but the Google+ export files are in other, easy-to-read file formats such as VCF or HTML.

SAVING LINKEDIN CONTENT

LinkedIn

Connections

- Login to [LinkedIn](#)
- Click on “Contacts” near the top of the page
- On the Contacts page, click the “Export Connections” link at the bottom.
- On the Export LinkedIn Connections page, choose the export file format and click the Export button
- Fill in the captcha information and click Continue
- The file will start to download
- I chose “Microsoft Outlook (.CSV file)”. The result was comma-separated and the information included was First Name, Last Name, E-mail Address, Company and Job Title.

Profile

- Login to [LinkedIn](#)
- Click on “Profile” to visit your profile page
- Look for the Edit button with the down arrow. Hover your mouse over it and then choose Export to PDF from the menu that appears.
- You can export anyone’s profile as PDF. When you visit their profile page, look for the Send InMail button instead of the Edit button.
- The entire profile gets exported, including skill endorsements and recommendations, but only the latter are credited.

TWITTER TOOL FOR DOWNLOADING YOUR TWITTER ARCHIVE

Downloading your Twitter archive

Downloading your Twitter archive to allows you to browse a snapshot of your Twitter information, starting with your first Tweet.

To download and view your Twitter archive:

1. Go to your [account settings](#) by clicking on the **gear icon** at the top right of the page and selecting **Settings** from the drop-down menu.
2. Click **Request your archive**.
3. When your download is ready, we'll send an email with a download link to the confirmed email address associated with your Twitter account.
4. Once you receive the email, click the **Go now** button to download a .zip file of your Twitter archive.
5. Unzip the file and click **index.html** to view your archive in the browser of your choice.

Please note: It may take a few days for us to prepare the download of your Twitter archive.

Was this article helpful?

Yes

No

SOCIAL MEDIA / NETWORKING POLICY TEMPLATE - LINKS

State of Arizona Social Media Policy:

https://aset.az.gov/sites/default/files/P505%20Social%20Networking%20Policy_0.pdf

National Archives Guidance on Social Media:

<http://www.archives.gov/records-mgmt/bulletins/2011/2011-02.html>

Social Media Database of 113 Policies:

<http://www.socialmediatoday.com/SMC/155843>

Web 2.0 Governance Policies and Best Practices:

<http://govsocmed.pbworks.com/w/page/15060450/Web-2-0-Governance-Policies-and-Best-Practices>

Social Media Policies Database:

<http://socialmediagovernance.com/policies.php>

GOT QUESTIONS?



Please complete an **Evaluation** – in email with on-line session instruction

HELPFUL CONTACTS

Records Management Center (LAPR):

<http://www.azlibrary.gov/records/>

Phone: 602-926-3815

records@azlibrary.gov

Jerry Lucente-Kirkpatrick:

jkirkpatrick@azlibrary.gov

Phone: 602-926-3820

Dr. Melanie Sturgeon:

msturgeon@azlibrary.gov

Phone: 602-926-3720

Toll Free: 1-800-228-4710 (Arizona only)

State Ombudsman's Office

<http://www.azleg.gov/ombudsman/default.asp>

State Attorney General – Public Records Publication

<https://www.azag.gov/sites/default/files/sites/all/docs/agency-handbook/ch06.pdf>

AIIM – Global Community of Information Professionals

<http://www.aiim.org/>

ARMA International:

<http://www.arma.org/>

Institute of Certified Records Managers (ICRM):

<http://www.icrm.org/>

National Archives and Records Management (NARA):

<http://www.archives.gov/records-mgmt/>

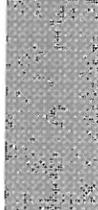
National Association of Government Archivists and Records Administrators (NAGARA):

<http://www.nagara.org/index.cfm>

ATTACHMENT 4

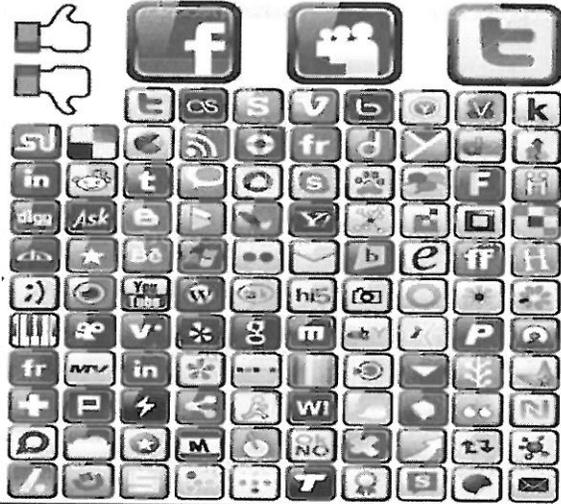
**WHO IS USING SOCIAL MEDIA
& WHY PUBLIC BODIES USE IT**

SESSION 6 OF 7 ON RECORDS MANAGEMENT

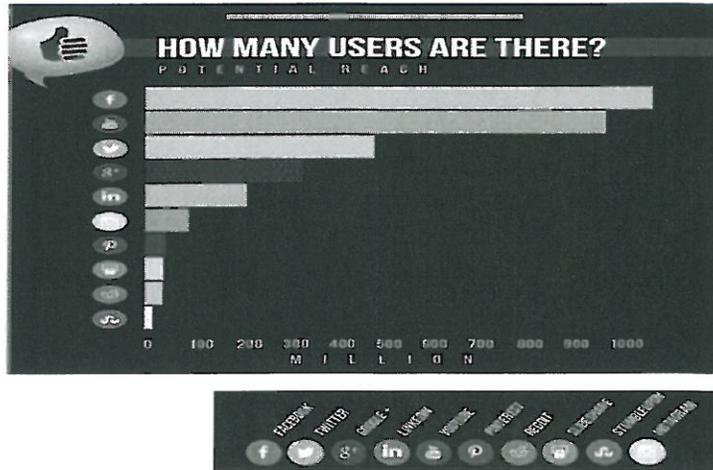


SOCIAL MEDIA

- Facebook
- LinkedIn
- Twitter
- YouTube
- Google
- Skype
- GovLoop
- and many more

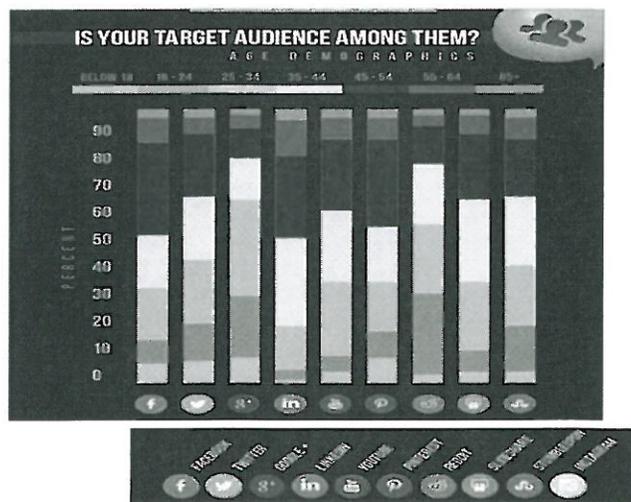


WHERE DOES YOUR AUDIENCE “HANG OUT” – BASED ON NUMBERS?



<http://pinterest.com/pin/112097478197769776>

Where does your audience “hang out” – based on age?



<http://pinterest.com/pin/112097478197769776/>

PRIMARY USES OF SOCIAL MEDIA BY GOVERNMENT

Share

Inform citizens of public services through social content (*result: increased access to information*)

Listen

Observe, analyze and understand what citizens are sharing (*result: improved customer service*)

Engage

Respond, collaborate and create with citizens to improve public services (*involve the community directly in government decision making*)

BENEFITS OF SOCIAL MEDIA FOR PUBLIC BODIES

- Enable internal collaboration
- Information sharing with external partners or contractors
- Exchange information with the public
- Keep pace with fast moving events
- Harness the ideas of the public to support your mission

<http://howgovleads.com/2010/09/30/5-benefits-of-using-social-media-in-the-federal-government/>

- Enhance situational awareness

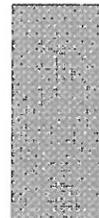
<http://www.govtech.com/e-government/Using-Social-Media-to-Enhance-Situational-Awareness.html>

BENEFITS OF SOCIAL MEDIA FOR PUBLIC BODIES - CONTINUED

- Provide greater transparency
- Reach citizens where they are (online)
- Provide easier access to services and information for citizens
- Save time
 - word of mouth advertising
 - allowing citizens to answer questions for one another)
- Save money (otherwise spent on print materials and phone calls)

CHALLENGES OF SOCIAL MEDIA – RECORDS MANAGEMENT

SESSION 6 OF 7 ON RECORDS MANAGEMENT



THE "PLACE" OF PUBLIC RECORDS

Why Mix Social Media and
Records Management?

Isn't Inherent Transparency of Social Media
Enough?

Are Openness and Transparency the only
responsibilities of Government?

DUTIES OF ALL PUBLIC BODIES AND EMPLOYEES FOR RETENTION & PRESERVATION

Establish and maintain an active, continuing program for the economical and efficient management of the public records of the agency.

ARS 41-151.14(A)(1)

WHO IS MANAGING ALL THAT STUFF?

Questions to think about:

- ❖ What is the difference between **data and records**?
- ❖ Whose “**responsibility**” is it to provide Records Management service to their customers?
- ❖ Who is in the **best position to “manage” electronic records**?
 - ❖ The creator of the content / record?
 - ❖ Or, the “post-er” of the content / record?
- ❖ Why do these questions matter?

UNIQUE VS. COPY – IT MATTERS!

Important RM Concept for all forms of Electronic Communication, including social media:

- ❖ Is **Content** in Communication a **Copy**?
- ❖ Is that content (of original not copy) **being retained and managed** (from RM perspective) elsewhere?
- ❖ Is **Content Unique** information?
- ❖ Is Unique Content **being retained and managed** (from RM perspective)?

HOW CAN ANYTHING SO EASY BE SO DIFFICULT?

Challenges with Social Media Records:

❖ A.R.S. require we (government) control (manage) our records during their entire retention period.

❖ Social Media sites provide little to no tools to help manage YOUR records on THEIR sites.

❖ Who controls the content on Social Media sites?

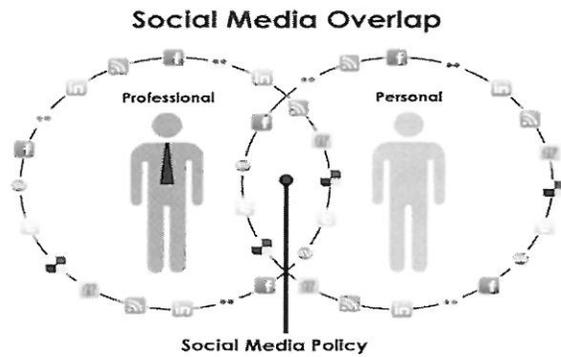
= Challenges to compliance with RM Statutes.

I'VE GOT THE KEYS TO THE CAR, BUT NO BRAKES!

In Summary,

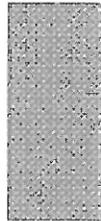
- "Everyone Is Doing It!" (Social Media)
- "No One Can Do It!" (RM for Social Media)
- You May or May Not Own It (Your Information)
- You Must Manage It (Your information)
- Where's Facebook when you need help? (to meet Statutory requirements)
- "Why did you want to live here?"

SOCIAL MEDIA DANGER ZONE



WHAT RECORDS MANAGERS NEED TO KNOW ABOUT SOCIAL MEDIA

SESSION 6 OF 7 ON RECORDS MANAGEMENT



OVERVIEW OF WHAT YOU NEED TO KNOW

- **Become familiar** with Social Media
- Understand the **value to the organization** and subunits
- Become involved from the start (RIM reference should be in every social media policy)
- Set **strategic plan** to handle social media records
 - both static and dynamic,
 - including the people, objectives, strategies and technologies
- Be sure provisions are made **for transfer or in place preservation**
- Continue to audit results and evaluate processes
- **Update your plan** as necessary
- Scan the horizon for **the next new technology** that results in records that must also be captured and managed—It's sure to come

Patricia C. Franks, PhD, CRM (From presentation to *NAGARA - Indianapolis*, given on July 12, 2013)

TO IMPLEMENT SOCIAL MEDIA RECORDKEEPING

- Understand the specific risks that apply to social media
- Know what the organization is doing with social media
- Develop a social media information strategy
- Support social media use with a policy that supports recordkeeping
- Be proactive
- Keep abreast of emerging trends in social media systems and use
- Patricia C. Franks, PhD, CRM (From presentation to *NAGARA - Indianapolis*, given on July 12, 2013)

RECORDS MANAGEMENT'S ROLE IN SOCIAL MEDIA GOVERNANCE

- Records management must understand the value and use of social media to business goals.
- Records management should determine the value of content and associated risks, including legal and regulatory requirements.
- Records management should be responsible for drafting governance policies and procedures including classification structure, metadata models, file plans, retention schedules, disposition instructions, and more.
- Records management should help identify technology requirements to support retention requirements.

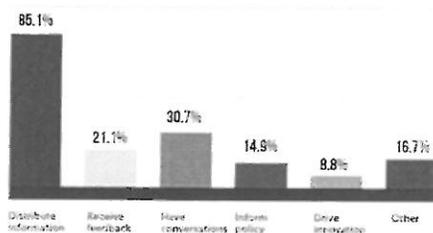
Patricia C. Franks, PhD, CRM (From presentation to *NAGARA - Indianapolis*, given on July 12, 2013)

IF ANSWER IS YES TO ANY OF THE FOLLOWING, YOUR SOCIAL MEDIA MUST BE SUPPORTED BY RECORDKEEPING FRAMEWORK

- Is a high risk or strategic business moving to (using) social media?
- Are business or client management decisions being made or communicated via social media?
- Are internal processes that were formerly supported by defined processes or workflows now moving to social media?
- Will clients rely on information posted to social channels?
- Will corporate reporting or accountabilities rely on the information posted to social media?
- Will any of the content being used on social media channels be reused?

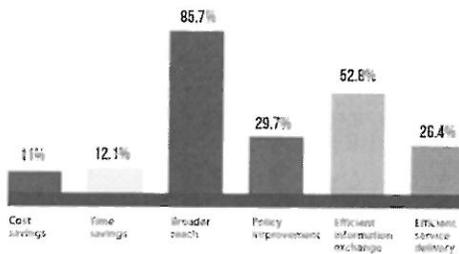
• Patricia C. Franks, PhD, CRM (From presentation to *NAGARA - Indianapolis*, given on July 12, 2013)

PRIMARY OBJECTIVE IN USING SOCIAL MEDIA



Results of GovLoop survey with 100 respondents from federal, state, city, and county governments. Source: GovLoop "The Social Media Experiment in Social Media: Elements of Excellence."

DEMONSTRABLE MISSION IMPACT



Results of GovLoop survey with 100 respondents from federal, state, city, and county governments. Source: GovLoop "The Social Media Experiment in Social Media: Elements of Excellence."

WHAT GOVERNMENT DIVISIONS ARE USING SoMe?

WHAT FUNCTIONAL AREA IN YOUR ORGANIZATION USES SOCIAL MEDIA?

FUNCTION	%
Communications / Public Affairs	80.7%
Emergency Management / Fire / Police	34.9%
Parks and Recreation	25.7%
Community Planning	22.9%
Public Works	22.9%
Health and/or Human Services	21.1%
Economic Development	19.3%
Environmental Protection / Services	19.3%
Transportation	17.4%
Budgeting / Finance	11.0%
Acquisition / Contracting	8.3%
Property Management	3.7%
Other	16.5%

Patricia C. Franks, PhD, CRM (From presentation to *NAGARA - Indianapolis*, given on July 12, 2013)

SOCIAL MEDIA RECORDS MATRIX AND RETENTION PERIODS

ISSUES INVOLVING EMERGING TECHNOLOGY AND SOCIAL MEDIA PLATFORMS



SOCIAL MEDIA SOLUTION: A POLICY, A MATRIX, AND A PRACTICE (RM)

Components of a Fully Integrated RM Solution to Social Media:

- ❖ “4 Pillars” of Records Management

Retention Schedules	Policies
Training	Documentation and Auditing
- ❖ Social Media Matrix
- ❖ Implementation and execution (enterprise-wide)
- ❖ Software / Technology Solution

Understanding the Solution?

- ❖ What is required in order to be in compliance?
- ❖ What your solution can and cannot do
- ❖ Need to create a workaround

SOCIAL MEDIA POLICY_ RECORDS MANAGEMENT PERSPECTIVE

- ❖ State and Understand Why You Are Using Social Media
- ❖ Define the Roles and Responsibilities
- ❖ Determine Who “Owns” the Content
- ❖ “Use the Matrix, Luke”
- ❖ Use the *Terms of Use*
- ❖ Execution, Implementation, Compliance and Auditing

KEY ASPECTS TO YOUR SOCIAL MEDIA POLICY

- Identifying what constitutes a record on social media platforms
- Defining ownership of content and responsibility for managing the records
- Developing recordkeeping requirements
- Incorporating recordkeeping practices and requirements into Terms of Use
- Communicating records policies so employees and the public understand how records will be managed
- Monitoring the ongoing use of social media platforms to determine if that use changes the value of the records
- Monitoring any changes to third-party terms of use

Steve Adams (From presentation to NAGARA - Indianapolis, given on July 11, 2013)

DEVELOP A DEFENSIBLE RIM PROGRAM

- Create and implement a records and information management (RIM) program.
- Consider legal retention requirements 'before' implementing social media initiatives.
- Publically state you will be capturing and keeping social media information you need to support your operations.
- Periodically delete ESI according to your "formal" retention policy.
- Enforce, evaluate, and update your Social Media and Records & Information Management policies and practices.

Patricia C. Franks, PhD, CRM (From presentation to NAGARA - Indianapolis, given on July 12, 2013)

SOCIAL MEDIA MATRIX

Overall Goals of the Matrix:

- ❖ Map business (or unit) moving to social media
- ❖ Map information moving to social media
- ❖ Assess your information needs and expectations
- ❖ Assess public accountabilities

QUESTIONING THE MATRIX

Question to ask and answer BEFORE:

- ❖ Why are you using social media?
- ❖ Intended vs Actual audience?
- ❖ Goals?
- ❖ Message?

Information to Capture:

- ❖ Who “owns” the product?
- ❖ Departments / Individuals using Social Media?
- ❖ Sites are they using / links?
- ❖ Access keys?
- ❖ Content?

GO BACK TO THE MATRIX – EXAMPLE OF US GOVERNMENT SOCIAL MEDIA MATRIX

Matrix of Web 2.0 Technology and Government

Technology	Simple Definition	Examples	Opportunity/Potential in Government
Blogs	Journal or diary with social collaboration (comments)	33 federal agencies have public blogs. USA.gov government blog libraries. Wikipedia.gov advice. GovSolutions.gov	Govt info to new audiences. Puts human face on gov't using informal tone. Opens public conversations. Surface issues & solve them.
Wikis	Collaborative authoring & editing	USA.gov. Core.gov. MAX. NASA. US Courts. Intellipedia. PTO, Diplomatia, Pence Corps, Utah Politicopia	Workgroup or public collaboration for project management, knowledge sharing, public input. Contributions to 3 rd party sites e.g. Wikipedia
Video Sharing (and Multimedia)	Videos, images, & audio libraries (YouTube, AOL Video, Yahoo! Video, tubemogul, heyspread...)	USA.gov Multimedia library, NOAA & NASA YouTube, Coast Guard, CA, RIA YouTube Channels, American content. Tobacco Free, Florida content	Public outreach, education, training, other communication for "connected" and on-line audiences. How To videos & audios to improve service and achieve mission. Cost savings potential. New audiences.
Photo-Sharing	Photo libraries	USA.gov website photo libraries, LoC & USGS galleries w. Flickr API. EPA content	Awareness.
Podcasting	Multimedia content syndicated out for use on iPod TM, Mp3 players & computers	White House, NASA, USA.gov federal podcast library. Webcast.gov. Peacecorps, Census daily podcasts	More ways to get message out. Build trust with conversational voice. Use for updates, live gov't deliberations, emergencies, how-to messages
Virtual Worlds	Simulations of environments & people (Webkinz, Club Penguin, Neopets, Stardoll, Whyville, Second Life, Active Worlds, Kaneva, ProtoSphere, Intraqua (Universe, uWorld))	NASA, NOAA, CDC, in 21, & Whyville VA, Natl Guard, Intergov, DoD, National Defense Univ, Federal Consortium for Virtual Worlds, Real Life Gov't and Life Google group	Public outreach & other communication for kids and niche Internet audiences. Virtual Town Halls, Education, Training. Ability to bring people together worldwide for meetings, lectures, etc.
Social Networking Sites	Connecting people globally	EPA Facebook action, NASA, Colab, USA.gov Facebook page, MySpace, LinkedIn	Intranet use to cross internal stovepipes. Cross government coordination. Public communities. Viral impact. Knowledge mgmt. Recruitment. Event announcements.
Syndicated Web Feeds	Automated notifications of frequently updated content (think RSS)	USA.gov Federal RSS Library, NOAA Watch	Do more with RSS, XML/Web feeds. Expand reach. Pull content together across government. Authoritative source. Reduce duplication.
Mashups	Combine content from multiple sources for an integrated experience	USA Search, USGS, NASA, EPA, Virtual Earth, Google Earth, Google maps	Lots of potential. Improved gov't reach, service, usefulness, and functionality. Integrate external data. Get licenses, stay vendor neutral. Make content available to others who create mashups.
Widgets, Gadgets, Pipes	Small applications & code in Web pages or for desktop use	EPA widgets, Veterans Affairs, Census Population Clock & NASA Planet Discoveries Desktop widgets	Increase awareness, use, and usefulness of gov't sites, information, and service. Bring content to the user's home page (iGoogle, netvibes, etc)
Social Bookmark & News (Sharing, Tagging) Sites	Ways of sharing content with others	USA.gov, NASA, GovLibrary, Digg, Delicious, Technorati, AddThis	Increase the popularity and use of gov pages, information, and services. Viral marketing.
Micro-blogging, Presence Networks	Form of blogging which allows brief (Instant Message style) text updates.	Twitter, Jaiku, Cromele, Pownce, NASA Edge, USA.gov, GovGrid, Univ of Mich	Seek input. Broadcast msgs, emergency news, announcements. Real time reports. Resonate.

July 18, 2008 Bev Godwin, USA.gov and Web Best Practices, GSA Office of Citizen Services

SOCIAL MEDIA VIRGINS BEWARE!

1. If You Post it, You Own It

- ❖ Whatever content / records government bodies post to Social Media sites belongs to the public body and NOT to the Social Media site - from a Records Management point-of-view.

2. If You Own It, You Manage It

- ❖ If you post something to any Social Media site, and the posting (words, pics, video, etc.) is work-related, then you have a statutory responsibility to retain the posted information for the approved & correct retention period.

3. If You Created It, You Should Manage It

- ❖ The Creator of any content being posted to social media sites (or other websites) needs to be responsible for the proper retention of the content they created.

YOU'VE GOT THE POWER - AT LEAST SOME

4. **"Blogs and Wall Posts. Oh My!"**

❖ These are the two most likely areas for Unique content that will need to be managed.

5. Email All Wall Posts

❖ Make sure you set up your social media site to generate an email to your designated email account (ex. info@yourcityortown.gov) **whenever anyone posts a comment to your wall.**

6. Maybe You Need to Purchase a Solution?

❖ If you are using social media consistently, weekly or daily

❖ If you have significant business information and processes on Social Media

SOCIAL MEDIA RETENTION PERIODS

Social Media Records managed by content

Public Information and Marketing Records General Retention Schedule:
http://apps.azlibrary.gov/records/general_rs/Public%20Information%20and%20Marketing.pdf

HOW LONG DO WE NEED TO KEEP SOCIAL MEDIA RECORDS? 3 MAIN RETENTION PERIODS

Retention Period: After reference value has been served

Type of Record:

Graphic Art (temporary / minor, draft)

Retention Period: 2 years after calendar year created or received

Type of Records:

Advertising and Outreach Records, Broadcast Logs, Photographs, Press Releases, Public Event Records (including calendar), Public Service Announcements (PSA), Speeches

Historical Records: Permanent. May Transfer to State Archives

Type of Records:

Graphic Art (Final version)
Records of enduring value

LEGAL CHALLENGES OF SOCIAL MEDIA FOR PUBLIC BODIES

SESSION 6 OF 7 ON RECORDS MANAGEMENT



RISK COMPONENT – TERMS OF USE (TOFU) CONTRACTS

Problem – If you want to use the Social Media site you Agree!

- Employee mindset toward setting up Social Media account is trained by their own personal use of Social Media
- We have been trained by previous use to “Click to Agree” to Terms and Conditions – but **this is a CONTRACT**
- **Contract between Public Body and Social Media site** very likely to be established by employee NOT Lawyer or Procurement professional
 - Employee likely did not even scroll through ToFU to review for acceptability
 - If they did, they probably would not know what is significant, what is in violation of Public Body procurement policies & practices, etc

FACEBOOK – CALIFORNIA IS JURISDICTION

- If you (or your employees) click “Accept” – **Your Public Body Agrees to:**
 - You agree to handle any legal challenges in California
 - Santa Clare County
 - California State Laws apply
 - Agree to limit Indemnity
 - Are your Public Body Attorneys licensed in Calif?
- **What You Lose – Your right to handle dispute in Arizona**

WORKING TOGETHER TO CHANGE FACEBOOK

Attorneys General from Colorado, Massachusetts, Michigan, New York, Pennsylvania, Washington state and several others, as well as the **National Association of Attorneys General** and **National Association of State CIOs (NASCIO)**'s Social Media Legal Workgroup participated in the yearlong discussions with Facebook.

When states began discussing concerns about social media 18 months ago, there was broad concern among state-level lawyers who worked in **procurement, CIO office and other business lines**, Robb said.

NASCIO Executive Director Doug Robinson added via a statement that terms-of-service problems "have impeded broader use" of Facebook and other social media tools by states.

Colorado took perhaps the most visible stance against Facebook. The **State Attorney General discouraged agencies from launching their own pages** because the terms of service were believed to violate the state constitution.

From *Public CIO*, January 05, 2011, by Matt Williams

SUCCESSES FROM STATE & MUNICIPAL PARTNERSHIP - NEW FACEBOOK TOFU FOR PUBLIC BODIES

New Option for 2011

State and Local Government Exception – What You Get

- Strikes Jurisdiction / venue in CA
- Strikes Application of CA Law
- Strikes the indemnity clause except to the extent indemnity is allowed by a state's constitution or law
- Encourage amicable resolution between public entities and Facebook over any disputes

FACEBOOK GOVERNMENT EXCEPTION – HOW TO GET IT

- State and Local Government Exception Applies
ONLY IF:
 - Select “Community / **Government**” Designation
 - **MUST Link Facebook page to your Government website**
 - Do NOT click “Education” or “Organization”
 - If you opened Facebook page before 2011 – **MUST change page to “Community / Government”**

ADDITIONAL LEGAL CHALLENGES OF SOCIAL MEDIA

- Harassment
- Defamation
- Copyright/Trademark infringements
- Breach of Confidentiality
- Endorsement Advertising Violations
- Recordkeeping

Patricia C. Franks, PhD, CRM (From presentation to *NAGARA - Indianapolis*, given on July 12, 2013)

SOCIAL MEDIA COURT CASES (ONLINE PERSONNA)

Eagle v. Morgan, 2013-11-4303 (E.D. Pa. 2013)

One of the first trials on the issue of **who owns social media accounts**:

The individual **Employee** who first **created** the account?

Or the **Employer** whose business was promoted using the account?

The U.S. District Court for the Eastern District of Pennsylvania held that **an employer's conduct, absent a company social media policy**, resulted in the torts of unauthorized use of name, invasion of privacy by misappropriation and misappropriation of publicity.

<http://www.socialmedialawupdate.com/2013/03/articles/social-media/who-owns-your-online-persona/>

"ONLINE PERSONNA" COURT CASES (CONTINUED)

The employer may have prevailed *if it had implemented a social media policy* that covered factors relevant to ownership, such as whether:

- (1) the employer paid the social media account fees;
- (2) the employer dictated the precise contents of the employee's account;
- (3) the employee acted expressly on behalf of the employer due to her position, role or responsibility; or
- (4) the social media account was developed and built through investment of the employer's time and resources.

<http://www.socialmedialawupdate.com/2013/03/articles/social-media/who-owns-your-online-persona/>

FOUR (4) SPECIFIC PROBLEM AREAS

SESSION 6 OF 7 ON RECORDS MANAGEMENT

1. BEWARE "EXECUTIVE COMMUNICATION" AND SOCIAL MEDIA

*****Beware "Executive Correspondence" in Social Media*****

- Executive Correspondence is a Permanent record if it "sets or discusses policy".
- Permanent Records - must be retained on paper or microfilm.
How will this be possible on Social Media?
- Any communication / correspondence that either discusses or sets policy, and takes place in any "physical form or characteristic" (ARS §41-1350), involving an executive (any Board, Commission or Council member, an Agency Director, elected official, County / Department / Division Leadership) will meet the definition of "Executive Correspondence".
- Where this discussion takes place does not matter: could be on paper, on a website, in an email, on Social Media, in a blog, in a shared workspace, definitely in Sire, etc.
- Since Policies are Permanent, then executive discussions of Policies become important Permanent records to help provide context to the Policy(ies).
- This specific records series is from the *Management Records* General Retention Schedules

2. DEFINITION OF HISTORICAL RECORD - OF INTEREST TO STATE ARCHIVES

If a record is historically significant, it is a permanent record.

**Permanent Records are of interest to the State Archives and future researchers.

The following are deemed **historically significant** records when:

- Document a **controversial issue**
- Document a program, project, event or issue that **results in a significant change that affects** the local community, city, county or state
- Document a program, project, event or issue that **involves prominent people, places or events**
- Document a program, project, event or issue that **resulted in media attention** locally, statewide or nationally

General Retention Schedules

Any record series listed as permanent on a general retention schedule should be transferred to the State Archives when the agency or political subdivision no longer wishes to maintain those records. You can reach the State Archives at 602-926-3720 or 800-228-4710 to discuss the transfer of the records.

3. VIDEO AS RECORD / PERMANENT RECORD

Videos and Tweets: Your website, YouTube, FaceBook, Twitter, etc

- **Make sure your only copy of the video / tweet is NOT online @ Social Media site.**

What types of videos / tweets would be of interest:

- Involving Core Values / Duties of Office
- Deal with controversial topics and/or topics of interest – You will recognize many of these issues, especially if you suddenly get a large number of letters, calls or e-mails on a hot topic:
 - in **opposition** to an issue
 - in **support** of an issue
 - expressing a **concern**
- **Examples of Current / Recent Issues**
 Abortion, Alternative fuels, Environmental issues, Fiscal concerns, Forests, wildfires and forest management, Gambling / casinos, Gas prices, Gay rights, Gun control, Freeways or highways, Illegal immigration, Land and development issues, Legalization of drugs, Legislation (involving your Agency), Important landmarks (if you still have correspondence), Terrorism/terrorists, Water issues, Welfare issues (for or against)

4. ELECTED OFFICIALS AND SOCIAL MEDIA

- Avoid “cleaning house” to make room for the newly elected official.
- Include both in-house and vendor / media produced
- Controversial Topics / Topics of Interest (prev. 2 slides)
- What records on Social Media will be of interest to the State Archives and the future:
 - Videos / Tweets / Media attention specifically involving the elected official
 - Inauguration
 - Speeches / Statements
 - Letters / Proclamations
 - Press Releases
 - Significant Events
 - Photos
 - Bio Statements
 - Involving Core Values / Duties of Office

TOOLS FOR MANAGING SOCIAL MEDIA

SESSION 6 OF 7 ON RECORDS MANAGEMENT



SOCIAL MEDIA TOOLS FOR CAPTURING CONTENT - WARNING

- The following slides present free options for downloading and saving content from social media sites. We are not promoting these sites, we are not approving these sites, but we are bringing to your attention the fact that there are some free tools available to help with social media content.
- Some social media sites now provide built-in “archiving” tools that will help you capture the content in a location outside of the social media site.
- Most of these tools are NOT RM approved tools, because they don’t have any retention capabilities, but merely a way of grabbing and saving content.
- These may not provide a legally defensible audit trail in court, so choosing between the tools requires a critical analysis, and may require additional technology layers.
- Since Facebook and Twitter did not initially provide archiving tools themselves, some other third-party applications have popped up to perform the task.

CAPTURING BLOGS

- If the blog does not contain comments, the blog posts can be captured and saved to a content management system before they are uploaded to the site.
- If the blog does contain comments, an RSS feed can be used to capture comments and forward them to the organization.
 - Some organizations use a sampling technique to capture some but not all of the comments made by visitors to the blog.
- If the entire blog, not individual posts, rises to the level of a record, the entire blog site can be captured in the same way a website is captured.
 - See RM Session 5 on Electronic Records

Patricia C. Franks, PhD, CRM (From presentation to NAGARA - Indianapolis, given on July 12, 2013)

DOWNLOADING FACEBOOK INFORMATION – FROM FACEBOOK

How can I download my information from Facebook?

- You can download your information from your settings. To download your information:
- Click at the top right of any Facebook page and select **Settings**
- Click **Download a copy of your Facebook data** below your General Account Settings
- Click **Start My Archive**
- Because this download contains your Timeline information, you should keep it secure and be careful when storing, sending or uploading it to any other services.

Can I pick and choose which information I would like to download?

- Unfortunately, there's no way to individually select which data you would like to download when you download your Facebook info. You'll have to download your file in its entirety.

Here is a link to information on “archiving” your Facebook information, which actually comes from Facebook.

- <https://www.facebook.com/help/131112897028467>

SAVING GOOGLE+ CONTENT

Google+

- Google Takeout is the official way to backup information from Google+ and other Google services like YouTube or Picasa.
- Visit [Google Takeout](#).
- By default, All of Your Data is selected but you can click Choose Services if you only want your Google+ stuff. Either way, choose what you want to backup and click the Create Archive button.
- Takeout will then start compiling all the information into a ZIP file you can download. If you don't want to wait – for me it took less than a minute, but I don't have many files in Google Drive or Picasa – you can just check the box that says “Email me when ready.”
- Once the ZIP file is ready, click the Download button.
- Even if you're already logged in, you'll need to enter your Google account password, after which you'll need to click the Download button again before the download will begin.
- Frankly, it works great. The ZIP file is very logically organized and the files are named very clearly in it. My only complaint is that not many non-techies are going to know how to get information out of the JSON files exported from Google Profile and Google Reader, but the Google+ export files are in other, easy-to-read file formats such as VCF or HTML.

SAVING LINKEDIN CONTENT

LinkedIn

Connections

- Login to [LinkedIn](#)
- Click on "Contacts" near the top of the page
- On the Contacts page, click the "Export Connections" link at the bottom.
- On the Export LinkedIn Connections page, choose the export file format and click the Export button
- Fill in the captcha information and click Continue
- The file will start to download
- I chose "Microsoft Outlook (.CSV file)". The result was comma-separated and the information included was First Name, Last Name, E-mail Address, Company and Job Title.

Profile

- Login to [LinkedIn](#)
- Click on "Profile" to visit your profile page
- Look for the Edit button with the down arrow. Hover your mouse over it and then choose Export to PDF from the menu that appears.
- You can export anyone's profile as PDF. When you visit their profile page, look for the Send InMail button instead of the Edit button.
- The entire profile gets exported, including skill endorsements and recommendations, but only the latter are credited.

TWITTER TOOL FOR DOWNLOADING YOUR TWITTER ARCHIVE

Help Center

Welcome to Twitter | [Me](#) | [Notifications](#) | [Discover](#) | [Mobile & Apps](#) | [Troubleshooting](#)

Account settings

Security & privacy

Profile settings

Direct messages

Tools

Favorites

Photos & media

Downloading your Twitter archive

Downloading your Twitter archive to allow you to browse a snapshot of your Twitter information, starting with your first Tweet.

To download and view your Twitter archive:

1. Go to your account settings by clicking on the gear icon at the top right of the page and selecting **Settings** from the drop-down menu.
2. Click **Request your archive**.
3. When your download is ready, we'll send an email with a download link to the confirmed email address associated with your Twitter account.
4. Once you receive the email, click the **Go now** button to download a .zip file of your Twitter archive.
5. Unzip the file and click **index.html** to view your archive in the browser of your choice.

Please note: It may take a few days for us to prepare the download of your Twitter archive.

Was this article helpful?

Yes No

QUICK RM TIPS FOR SOCIAL MEDIA

SESSION 6 OF 7 ON RECORDS MANAGEMENT

THINK BEFORE YOU TWEET...

- **Use of Terms**
 - Incorporate the Terms of Use into your policy / procedures
- **Keep It Simple**
 - Keep to one topic at a time – for ease of Records Mgmt
- **Use a Title / Heading**
 - Where possible (blogs) use a Heading to help with Records Mgmt
- **Train, Train, Train**
 - You can never train staff too much on e-communications & RM
- **The Matrix**
 - Keep a Matrix of who is using Web 2.0, by application
- **If it Works, Use It**
 - Consider having a SocNet site that tells others how to set these up

SOCIAL MEDIA / NETWORKING POLICY TEMPLATE - LINKS

State of Arizona Social Media Policy:

https://aset.az.gov/sites/default/files/P505%20Social%20Networking%20Policy_0.pdf

National Archives Guidance on Social Media:

<http://www.archives.gov/records-mgmt/bulletins/2011/2011-02.html>

Social Media Database of 113 Policies:

<http://www.socialmediatoday.com/SMC/155843>

Web 2.0 Governance Policies and Best Practices:

<http://govsocmed.pbworks.com/w/page/15060450/Web-2-0-Governance-Policies-and-Best-Practices>

Social Media Policies Database:

<http://socialmediagovernance.com/policies.php>

GOT QUESTIONS?



Any Questions?

Please complete an **Evaluation** – in email with on-line session instruction

HELPFUL CONTACTS

Records Management Center (LAPR):
<http://www.azlibrary.gov/records>
Phone: 602-926-3815
records@azlibrary.gov

Jerry Lucente-Kirkpatrick:
jkirkpatrick@azlibrary.gov
Phone: 602-926-3820

Siegfried Rempel:
(Conservator)
srempel@azlibrary.gov
Phone: 602-926-3720

Dr. Melanie Sturgeon:
msturgeon@azlibrary.gov
Phone: 602-926-3720
Toll Free: 1-800-228-4710 (Arizona only)

State Ombudsman's Office
<http://www.azleg.gov/ombudsman/default.asp>

State Attorney General – Public Records Publication
<https://www.azag.gov/sites/default/files/sites/all/docs/agency-handbook/ch06.pdf>

AIIM – Global Community of Information Professionals
<http://www.aiim.org/>

ARMA International:
<http://www.arma.org/>

Institute of Certified Records Managers (ICRM):
<http://www.icrm.org/>

National Archives and Records Management (NARA):
<http://www.archives.gov/records-mgmt/>

National Association of Government Archivists and Records Administrators (NAGARA):
<http://www.nagara.org/index.cfm>

GUIDANCE ON SOCIAL NETWORKING

Outline:

- A. Records Management Considerations
- B. Information Technology Considerations
- C. Important Links

A. Records Management Considerations

1. For the Record

As public bodies / governments, any information created for, or received from Social Networking / Web 2.0 applications and tools will probably be a record. If the information / data meets the requirements of the definition of a “record” in Arizona Revised Statutes (A.R.S.) §41-1350, then you will need to retain such information. Any Social Networking (SocNet) records will need to be managed in a way that complies with all of the Records Management requirements found in State Statutes. (See A.R.S. §39-101, §41-1330-55)

Title 41-1350. Definition of records

“In this chapter, unless the context otherwise requires, "records" means all books, papers, maps, photographs or other documentary materials, **regardless of physical form or characteristics**, including prints or copies of such items produced or reproduced on film or electronic media pursuant to section 41-1348, **made or received** by any governmental agency in pursuance of law or in connection with the transaction of public business and preserved or appropriate for preservation by the agency or its legitimate successor **as evidence of the organization, functions, policies, decisions, procedures, operations or other activities of the government, or because of the informational and historical value of data contained therein.** Library or museum material made or acquired solely for reference or exhibition purposes, *extra copies of documents preserved only for convenience of reference* and stocks of publications or documents intended for sale or distribution to interested persons are not included within the definition of records as used in this chapter.”

2. SocNet is No PicNic

The Statutory requirements regarding Records Management of public records are never easy, and that is especially so for these records. You need to be prepared for these challenges, and aware of the difficulties you will face in complying with these requirements regarding SocNet records. Our Agency is aware of these difficulties, and that is our main reason for providing this Guidance. It is our hope that you will be able to think about these issues before you decide the extent of your involvement in SocNet / Web 2.0 – and take the necessary steps to ensure successful management of these records. And remember, e-mail has been around for over 15 years and we are all still trying to find the most efficient and cost effective manner for properly managing **e-mail records**.

3. It's the Content (and Intent), Stupid

In the 1992 Presidential Election, the unofficial slogan of the Clinton Campaign was, "It's the Economy, Stupid." A potent reminder, both then and now, to not overlook the critical issue(s) facing us with any problem. With SocNet records, it really is the content that is most critical, from a Records Management point of view.

The transitory nature of most SocNet communication does not mean that any records created or received while using these tools will be transitory. It is the **content and the intent** of the communication that determines whether these communications will qualify as records, and the specific retention period required for such records. The content created or received will determine what type of record series is most appropriate for the information, and the records series will then determine the retention period needed for such records.

If the records are truly duplicates or copies being retained elsewhere, then their retention as SocNet records will be short-lived. But, in the case of comments / postings / feedback, most of this will be unique and will need to be retained per specific records series / retention periods and based upon the content of these communications.

4. No Schedule, No Service

Make sure SocNet records are on a Retention Schedule. Placing these records on a Retention Schedule will help draw attention to the fact that information created or received from these sites can be records, and require the appropriate retention as records. The ASLAPR revised the earlier "E-mail Schedule" from 2006, and expanded that Schedule to include all forms of electronic communications and social networking. The resulting General Schedule is the *Electronic Communications and Social Networking Records*, and it is an identical Schedule for all seven types of public bodies. As an example, the *All State Agencies, Boards and Commissions* Schedule can be found at the following link: <http://www.lib.az.us/records/documents/pdf/state%20-%20email.pdf>

5. For Once, Try NOT to be Original

Copies / duplicates of information already existing and being managed elsewhere by an Agency are Not public records, so that information will not need to be retained, or can be retained for a short period of time. (See italicize portion of A.R.S. §41-1350, above) From a Records Management point of view, you will want to set up guidelines for what topics / subjects / information can be blogged posted or networked. Try to avoid asking for public comment on policies, procedures or topics coming up for possible consideration at future Board / Council meetings. This may make such communications, "Executive Correspondence...that sets or discusses policy" and these types of records (records series) are Permanent – requiring retention on paper or microfilm.

As much as possible, ask employees to use information / data / records that already exist elsewhere in your Agency. It is much easier to manage information on your own website(s) than it is to manage pages on Facebook, or any other SocNet site. Keeping original, unique information under your direct control and posting only duplicate information to SocNet sites places you in a better position to manage your electronic records and content.

6. King of the Content

Who controls the content of these SocNet records? In most cases, the SocNet website will have full control over the content of everything posted to their sites. And, if they control the content, then they will usually control the retention of the records, therefore controlling the entire Records Management process. It is difficult to manage what you have no control over. Most SocNet sites have little to no Records Management capabilities since they view this type of communication as transitory. But remember, just because SocNet information may be viewed as temporary and casual does not mean that records created or received by SocNet are transitory; it's all about the content.

As public bodies, you will need to “manage” these records, as you would any other records. See the requirements of A.R.S. §41-1346: “A. *The head of each state and local agency shall: 1. Establish and maintain an active, continuing program for the economical and efficient management of the public records of the agency.*” The State of Arizona has approached some of the larger players in the SocNet world, and is working with these sites to incorporate controls and features needed by public bodies that have not been previously designed into these sites. The capabilities needed from a government standpoint are very different from those of the general public.

Most of the capabilities being discussed have been developed by first making these sites aware of statutory requirements for records management, security, and so on. One pending enhancement is the ability to “certify” a page as being a true “State of Arizona” Agency or Officer page. Just because a SocNet page claims to be an Arizona Agency or Elected Official does not mean it is actually the product of such. There is a need to be able to “certify” to the public that the page is not bogus, nor maliciously bent on abusing the ignorance of the visitors to such a page.

7. If you Can't, Should You?

If you can't manage the records created or received by SocNet, should you allow the use of SocNet? The Statutes require public bodies to “efficiently and effectively” manage their records, so make sure that you can properly do so before you start tweeting, blogging or posting. You may need to “turn off” certain aspects of a social networking site / application, if you are not prepared to fully manage the SocNet records generated.

This may make your SocNet site more of a one-way communication tool, but it can help prevent some of the problems associated with two-way communication sites until you are ready to handle them. For instance, if you are not prepared to manage messages posted to your page, then you should consider turning off the capability of allowing others to leave wall posts. Unfortunately, that is easier said than done with some SocNet sites.

8. E-mail Comments and Postings

Comments, wall postings, etc received by Users, Friends, Fans (and others) of your SocNet site will probably be unique records. As such, you will need to capture and retain them accordingly. Comments posted to some sites can be forwarded as an e-mail, which increases your ability to better manage these unique records. Having these comments and postings e-mailed to one of your e-mail accounts puts the control over these records back into your hands. Consider forwarding these e-mails to an Agency account, similar to those used to capture public comments made on your government websites.

Facebook does, however, offer this function, and you can learn how to do so from the blog, **April's Chatter Box**. (See the entry, "Public Records...Tools for RM Archiving of Twitter & Facebook", at the following:

<http://apriledmonds.wordpress.com/2009/12/10/tools/> If you are not prepared to manage the comments / postings, or the sites are not able to forward such postings to your e-mail address, you can sometimes turn off the ability of the public to post such comments.

9. Notify and Involve Information Technology (IT)

If it isn't already apparent, most Records Managers will need to partner with their Information Technology colleagues if they want to truly manage the great potential and challenges posed by SocNet. Make sure your IT professionals are able to track the use of these technologies as they do e-mail and other e-communications. Involve them by asking how you can capture, retain and manage these records. Any electronic communication requires a concerted, coordinated effort on behalf of your Records Management and IT personnel. There may already be an I.T. policy governing use of the internet and related tools and sites, but you can make sure Records Management concerns are fully addressed in these policies.

10. No Policy, No Service

Have a policy on SocNet (along with other e-communications) and focus on Records Management responsibilities and requirements. Public bodies need to know what their employees are using SocNet for, and what information is being created and / or received. This can best be done upfront, by defining the parameters of SocNet activity. Make sure your policy sets the party / parties responsible for capturing, retaining and managing these SocNet records, or you will ensure that no one is responsible.

This Guidance could be used as a great start to creating your own Records Management policy for Social Networking. If you don't want to totally reinvent the wheel, you can review over 100 Social Networking usage and / or governance policies at the following links:

Social Media Policies Database of Over 110 Organizations
<http://www.socialmediatoday.com/SMC/155843>

Social Media Governance Database of Over 130 Policies:
<http://socialmediagovernance.com/policies.php>

11. The Matrix

An essential outgrowth of either the I.T or Records Management policy for Electronic Communications and SocNet will be the matrix. You will need to create and maintain a matrix of your Agencies / Divisions / Employees use of Web 2.0 technology, best broken down by application. This matrix should include the specific technology involved, Departments involve, web address / location of each, and the opportunities / potential for each. See an example of the excellent Federal government matrix at the following US.gov link: http://www.usa.gov/webcontent/documents/Web_Technology_Matrix.pdf

12. If it Works, Use It

Control SocNet activities from the very beginning. One of the best ways to ensure that the use of SocNet sites and tools is going to be acceptable to your public body is to provide guidance and assistance when the SocNet pages are first being set up. Consider developing a Tool Kit, or even creating a SocNet page that teaches your Agencies / Departments how to set up a SocNet account / page of their own.

See either the State of Florida or the Federal Government toolkits at the following sites:

State of Florida: <http://sites.google.com/site/flsocmed/>

(You need to click the links at the bottom of the page to get more information on "Lessons Learned", "Twitter", "Video", etc.)

Federal Government: http://www.usa.gov/webcontent/technology/other_tech.shtml

13. Use the Terms

What do you do if someone in the public posts a message to your SocNet site that is offensive or obscene? Do you immediately remove the post and delete the record? Do you allow the post to remain on your wall? Do you remove the post but retain it at a secure portion of your site? Remember that post to a government SocNet site are probably going to meet the statutory definition of a record, and must be managed accordingly.

Consider incorporating the Terms of Use established by the venue for your SocNet activities into your Policy. These Terms of Use already define ones participation in SocNet, so why not reflect them in your policy? In most cases, these Terms of Use will address issues such as profanity, intellectual property and / or copyright infringement, and other difficult issues. Most users of SocNet sites will be familiar with the need to both know and comply with the Terms of Use, and will not find it unusual that your public body SocNet site has incorporated these Terms into your policy, procedures or practices.

14. Keep It Simple

Try to keep communications / blogs to a single topic, since this will make it easier to manage these records. Retention Schedules are built around managing records according to one specific retention period for each specific records series / type. Mixing multiple topics in your SocNet communications will make it that much more difficult to determine the correct retention period for these records. In addition, be aware of the subjects that require longer retention, and try to avoid these. (Remember that “Executive Correspondence... that sets or discusses policy” is a Permanent record and, as such, cannot be retained electronically.) It is probably best to discourage your executives from having “correspondence” with the public about established, pending or potential policies.

15. Use a Title / Heading

Whenever and wherever possible, use a title or heading for your information, since this will help with managing these records. (Similar to the subject line for e-mail.) Most government employees familiar with e-mail and other forms of electronic communications will be acquainted with such a header / subject line, and will be more likely to use one. Make sure the title / heading of your posting / entry accurately describes the content and / or intent of your information.

The heading used will help guide those tasked with retaining these records. If your blog article is titled, *Social Networking From a Records Perspective*, it will be easier to determine the retention period and manage the record accordingly. If you are not required to manage your own SocNet sites, then making use of a heading or title will help others know how best to categorize these records on the Retention Schedule, thereby guaranteeing the proper retention period.

16. Train, Train, Train

You can never train too much on the Records Management aspects of SocNet and other forms of electronic communication. Training is an important aspect of any compliance program, and is a sure line of defense for any public body. Remember the four pillars of an effective Records Management Program – Retention Schedules, RM Policies, Training and Documentation.

What should you train your employees on when it comes to SocNet? Take some wise advice from the Feds - The following is an excerpt from the September 2009, Federal CIO Council publication, *Guidelines for Secure Use of Social Media by Federal Departments and Agencies*. This section focuses on what governments should incorporate into employee training on SocNet, and offers some great advice on things we should be aware of.

- a. “Users are almost always the weakest link in an information system, and may inadvertently divulge sensitive information through a social network. Few effective technical security controls exist that can defend against clever social engineering attacks[19]. **Often the best solution is to provide periodic awareness and training of policy, guidance, and best practices.** The proper use of social media in the Federal Government should be part of annual security awareness training, and address the issues below.
- b. Provide specialized training to educate users about **what information to share, with whom they can share it, and what not to share.** For an example of establishing departmental policy on what to share on social media websites, see the United States Air Force New Media Guide[9].
- c. Provide guidance and training **based on updated agency social media policies and guidelines**, including an updated Acceptable Use Policy (AUP) specific to social media websites.
- d. Provide guidance to employees to **be mindful of blurring their personal and professional life.** Don’t establish relationships with working groups or affiliations that may reveal sensitive information about their job responsibilities.
- e. Provide Operations Security (OPSEC) awareness and training to educate users about the **risks of information disclosure when using social media, and make them aware of various attack mechanisms** as described in this document.
- f. Provide federal employees with additional **guidance concerning if and how they should identify themselves on social media websites, depending on their official role.**
- g. Provide specialized awareness and training on Privacy Act requirements and restrictions. **Educate users about social networking privacy controls to help them take control of their own privacy**, both in their personal profile and any profile they use for work-related activities.

h. Educate users about **specific social media threats before they are granted access to social media websites**. Users may be desensitized to openly granting unnecessary access to their private information. For example, users may click “OK” without reading the full message and understanding the permissions they are granting.”

(Guidelines for Secure Use of Social Media by Federal Departments and Agencies, September 2009)

B. Information Technology Considerations

8 Essential Elements for an Effective Government Social Networking Policy

Government Technology magazine / webzine, May 25, 2010, By Karen Wilkinson, Staff Writer

While government agencies keep evolving to "meet citizens where they are" by joining social media sites, creating policies that allay the risks such tools pose can be an arduous, convoluted task.

"Creating a policy for the use of social media policy by a government agency is not a simple task," states a recent study from the Center for Technology in Government (CTG) at the University at Albany, State University of New York. "One not only has to contend with an ever-changing landscape of the social media environment, but also with the various ways governments employees are using these tools to do their work."

While there are many examples of government agencies effectively engaging citizens via social media tools, these best practices remain relatively new and unexplored for the majority of governments nationwide, according to the study.

"What we've noticed is there's a lot of fears, questions and concerns related to social media use," said CTG Program Associate Jana Hrdinová. "We try to take these fears and concerns and classify them into manageable areas -- to make it easy to follow through all the various questions and not get lost in the process."

In a study of 26 publicly available government social media documents, along with results from interviews with 32 government professionals already using or considering using social media tools, the CTG winnowed its findings down to eight essential elements to address for the use of social media.

Those eight elements include employee access, account management, acceptable use, employee conduct, content, security, legal issues and citizen conduct. While these elements don't cover every possible issue (the guide is part of a larger project under way that focuses on government use of social media tools), it's a jump-off point:

1. Employee Access

Not long ago, social media sites fell under the "non-work-related" umbrella, and thus governments tended to restrict access to these areas of the Internet. But those lines have blurred lately as personal, professional and official agency use of social media tools has become common, raising questions about whether employees should have access to social media sites and the proper means for gaining access.

Agencies are managing access in two ways: controlling the number and type of employees allowed access to social media sites or limiting the types of sites that are approved for employee access. Most agencies interviewed by the CTG restricted access to such sites, instead allowing access for only a handful of designated individuals or functions (such as leadership or public information officers).

But formal policies that specifically address access appear lacking: Of the 26 policies and guidelines CTG reviewed, only five specify access procedures. "Of those five, most required employees or departments to submit an official business case justification in order to access and use social media sites," the study said.

Based on its interviews, balancing unrestricted and controlled access is a dilemma for many agencies. "While some agencies may value the potential opportunities for professional development when employees are engaged in educational, collaborative or knowledge sharing activities fostered by open access to social media sites, many are still fearful of the perceived legal and security risks," the study said.

2. Account Management

This entails the creation, maintenance and potential destruction of social media accounts. Lacking a policy for this could result in a situation where an agency's leadership is in the dark about what types of accounts are being established, maintained or closed by their employees for professional or official agency use, according to the study. In policies reviewed by the CTG, such strategies varied. One strategy required approval by only one

designated party (most often the public information officer), while other agencies require approval by more than one party.

"While our sample of government policies is too small to draw any definite conclusions, local government policies tend to be more explicit on account management as compared to state or federal agencies," the study said.

3. Acceptable Use

Such policies usually outline an organization's position on how employees are expected to use agency resources, restrictions on personal use and consequences of violating the policy. Twelve of the policies and guidelines reviewed by the CTG dealt with this specific issue, and the majority of them used existing policies that already dictated acceptable use of common electronic and information resources such as telephone, computer or Internet access.

This is perhaps one of the more disquieting, gray areas of social media policy, Hrdinová said, as it's difficult to make clear-cut distinctions between professional and personal use. For example, an employee may be Facebook friends with a CIO from another agency and chat in person and online about common interests, which may ebb and flow without much distinction from personal to professional. "But at the same time, are they strengthening the professional relationship?" she asks.

To illustrate the lack of policies surrounding acceptable personal use during designated times or nonwork hours, the CTG found that only three of the 26 policies have started addressing the issue.

For some agencies, the line isn't so blurry: Arvada, Colo., has a social media policy that clearly states, "Social media use is for corporate goals and objectives, not for personal use."

Others, like the U.S. Air Force, have more lenient policies and encourage their members to think of themselves as on duty 24/7 when it comes to social media use. Others suggested "acceptable employee use for professional interest is better monitored and managed by supervisors, rather than a one-size-fits-all policy.

4. Employee Conduct

Most agencies reference existing policies by either using direct quotes or providing links or reference numbers on specific policies that address what is "right" and "wrong" as far as employees' behavior, and sets out consequences should a violation occur. However, none of the reviewed policies directly address the consequences of inappropriate conduct on personal social media sites, the CTG said.

In addition to standard conduct codes that address issues like racially offensive language, some policies address issues more specific to social media, including respecting the rules of the venue, striving for transparency and openness in interactions, and being respectful in all online interactions. "Other policies expressed an expectation of 'trust' that employees will provide professional-level comments or content whether in their professional or personal lives," the study said.

While creating policies to address consequences of inappropriate use of social media tools is largely untouched territory, outlining which aspects are just recommendations for personal behavior and which are potential grounds for dismissal "might be useful for employees and their managers trying to navigate and define the parameters of the personal/professional divide," the study said.

5. Content

Issues of who is allowed to post content on official agency social media sites and who is responsible for its accuracy came up frequently in the CTG's interviews. Fourteen of the reviewed documents address content management in some form. In many cases, such as Fairfax County, Va., content creation is given to the department or person who created the account, with the agency's public information officer being responsible for ensuring the accuracy of posted information and adherence to existing social media guidelines. But "the question of content management with respect to an employees' professional and personal use is left largely unexplored in policy and guideline documents," the study said.

More and more, professionals are engaging in work-related group discussions on sites like GovLoop and LinkedIn, and leaving online comments in response to work-related topics on external blogs, another concern for agencies. Ten of the 26 policies simply instruct their employees to always use a standard disclaimer that distances the employee's opinions and content from the official agency position.

For example, the Air Force's social media policy and guidelines instruct employees to specify, through a disclaimer, that any comments provided by an employee on external social media sites are personal in nature and do not represent the views of the Air Force.

6. Security

Agencies are trying to develop best practices to ensure security of their data and technical infrastructure in light of new uses, users and technologies related to social media. Some of the 26 policies deal explicitly with social media security concerns, while others are more general. For example, the Hampton, Va., policy points to existing IT security policies by stating, "Where appropriate, city IT security policies shall apply to all social networking sites and articles."

Others target specific concerns: Two types generally found in the policies analyzed and discussed in interviews were technical and behavioral concerns. Technology concerns addressed in the policies focused on password security, functionality, authentication of identity using public key infrastructures and virus scans. Fifteen of the policies included specific requirements such as requiring users to maintain complex passwords, and a few policies required a designated official to hold all usernames and passwords for social media accounts. As well, two policies detail how attachments should be scanned using anti-virus tools before being posted on behalf of the government.

Public-sector employees also may inadvertently post information about themselves or the agency on social media sites, which attackers then use to manipulate users. A related concern is the inadvertent posting of citizens' personal and protected information by agency employees. "While these concerns are not new, many of the reviewed policies mentioned the need to protect confidential information that is personally identifiable or could endanger the agency mission," the study said.

7. Legal Issues

While some agencies' policies take a general approach to legal issues -- using generic text that requires all employees to adhere to applicable laws and regulations without specifying which are applicable -- others point to specific areas of law like privacy, freedom of speech, freedom of information, public records management, public disclosure and accessibility. Many agencies address the issue of records management and retention, but few include language related to the removal of records. Massachusetts, however, highlights the transitory nature of records in its guidelines on Twitter and gives instructions on how to download tweets from Twitter to prevent content loss.

Some agencies' policies proactively address potential legal issues by requiring using various disclaimers on social media sites like Hampton which directs its employees who engage on behalf of the city to "make clear that you are speaking on behalf of Hampton. If you publish content on any website outside of the city of Hampton and it has something to do with the work you do or subjects associated with the city, use a disclaimer such as this: 'The postings on this site are my own and don't necessarily represent the city's positions or opinions.'"

8. Citizen Conduct

Grappling with instant two-way public communication between government and citizens is relatively new, and agencies must decide whether to allow such communication like comment boxes and how to handle that engagement. "For agencies that decide to elicit citizen feedback via their official agency social media sites, rules for acceptable conduct of citizens are often developed," the study said.

Eleven of the 26 policies and guidelines addressed this issue. Documents vary on how to deal with the content of such comments. "Some issue rules of conduct that are posted on the agency's site," the study said. "These rules generally refer to limitation on offensive language, inciting violence or promoting illegal activity. Similar rules are often already on agencies' websites and can be reused for social media purposes." But some policies, like Arvada's, simply detail who will have the responsibility of approving public comments without going into detail as to what makes a comment acceptable.

On top of the eight elements to effectively design a government social media policy, the CTG offers further guidance for those governments that are just getting started, including determining goals and objectives, forming a team, identifying existing policies that apply to using social media tools and discussing conflicts or inconsistencies between proposed, and existing policies and procedures.

*(8 Essential Elements for an Effective Government Social Networking Policy, By Karen Wilkinson, **Government Technology** magazine / webzine, May 25, 2010.)*

C. Important Links (accurate as of 06/15/2010):

1. Why Governments Need a “How-to Toolkit” When Using Social Media / Social Networking:

<http://www.govtech.com/gt/765118>

2. State of Florida Toolkit for “How to Use” Social Media / Social Networking Tools:

<http://sites.google.com/site/flsocmed/>

You need to click the links at the bottom of the page to get more information on “Lessons Learned”, “Twitter”, “Video”, etc.

3. Federal Government’s Toolkit for Web 2.0 and Social Networking:

http://www.usa.gov/webcontent/technology/other_tech.shtml

4. State of Arizona Policy on Social Networking:

http://www.azgita.gov/policies_standards/pdf/P505%20Social%20Networking%20Policy.pdf

5. Tools for RM Archiving of Twitter & Facebook:

<http://apriedmonds.wordpress.com/2009/12/10/tools/>

6. Social Media Policies Database of Over 110 Organizations

<http://www.socialmediatoday.com/SMC/155843>

7. Social Media Governance Database of Over 130 Policies:

<http://socialmediagovernance.com/policies.php>

8. United States Air Force, Web Posting Response Assessment:

<http://www.af.mil/shared/media/document/AFD-091210-037.pdf>

ATTACHMENT 5

Denying free speech or protecting the truth?

Hillary Davis, The Explorer | Posted: Wednesday, May 20, 2015 4:00 am

An Oro Valley man who was kicked off the town's official Facebook page after posting critical comments about the town's acquisition of the El Conquistador has filed a complaint with the American Civil Liberties Union, claiming a violation of his free speech rights.

Earlier this month, Brian Selvy posted this: "What an abuse of power by the M-4. Quid Pro Quo at work, everyone." He said it was opinion that he could back up. But town officials said it violated their policy against posting inaccurate statements.

The town gets to decide what's truthful, said Town Legal Services Director Tobin Sidles, because it's their Facebook page.

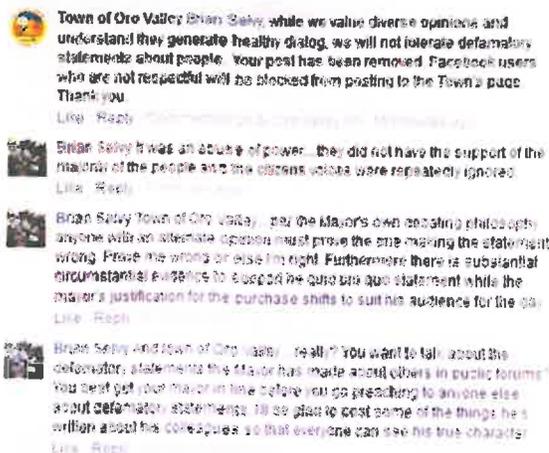
"Now you can't remove anything just because it's negative. We all know that," he said. "If you'll look at it you'll realize there are lots of negative comments on there. But you can go one step too far."

The kerfuffle happened in the comments thread of a photo from the May 2 ribbon cutting at the La Cañada Drive community and recreation center. According to screenshots and text message and email exchanges released to the Explorer by both the town and Selvy, Town Manager Greg Caton green-lighted the actions against Selvy: deleting of his "quid pro quo" post, a warning and then banning after he reposted the comment in his reply.

Sidles said the Facebook page is a "limited public forum," giving the town wide latitude in controlling content. And Selvy's "quid pro quo" statement accused town leaders of something illegal, he said.

Selvy later said he meant "quid pro quo" in a colloquial sense, and it's a position that he can defend.

He said he wants his deleted posts and posting privileges restored, along with "acknowledgement on the part of the Town of Oro Valley that they have improperly censored free speech" and an



Town of Oro Valley Facebook

Facebook comments from Brian Selvy before he was banned from Oro Valley's page.

update to the town's social media policy "that properly protects the First Amendment rights of the town's constituents." If the ACLU does take up the case and takes it to court, he'd be interested in being a party to a lawsuit, he said. The ACLU had not made a determination on Selvy's complaint as of Monday.

A public forum can be traditional, designated or limited. A traditional forum has the most liberal free speech controls. A limited public forum's are the tightest.

A disclaimer posted to the Facebook page and the town's website warns against content that "is deemed inaccurate, objectionable or inappropriate for children," or contains defamatory statements, personal information about people or groups, or comments about "political campaigns, elections or related efforts." It notes that blocking users is a possible consequence. The town updated its Facebook policy earlier this month, around the same time as the discussion with Selvy, but Caton said that was a coincidence.

Case law on government Facebook pages is limited. In 2012, two Hawaii men sued the Honolulu Police Department after their critical postings were removed and their accounts blocked. The case resolved out of court, with both sides quickly coming to a compromise that clarified the department's posting policy. The city of Honolulu also paid \$31,000 toward the plaintiffs' attorneys' fees. But Sidles said that has no precedential value because it didn't go beyond the initial, trial court level.

David Hudson, a First Amendment scholar at the First Amendment Center in Nashville, Tennessee, said one question is whether Oro Valley created a limited public forum, or if they have regularly allowed people to post comments.

"If they have and it can be shown that they discriminated against this guy because of his viewpoint then he may have a legitimate First Amendment beef," Hudson said.

He said even in a nonpublic forum, restrictions on speech must be "reasonable and viewpoint neutral."

Those same basic requirements apply to a limited public forum, which is created by government for discussion of certain subjects with limits they can establish.

"Is truthfulness reasonable and is it viewpoint neutral?" Sidles said. "Well, the answer's yes."

Town Communications Administrator Misti Nowak said plenty of negative comments remain on the Facebook page.

"It's in very rare, rare instance that we remove a comment," she said. "In four years, this is the first person that I'm aware of that we've banned."

But for Selvy, it's suppression of diverse opinions.

In an email to Caton, he blasted the town's standards.

“It should not be the place of government to stifle or suppress those with differing opinions, nor should a town's media outlets be utilized to generate and disseminate propaganda and censor not only differing views but facts that strongly call into question said propaganda.”