
SIL SOCIAL MEDIA STRATEGY AND GUIDELINES

FINAL DRAFT V. 1.0 AUGUST, 2012

PURPOSE

The purpose of this document is to assist SIL staff engaged in social media on behalf of the Libraries. It closely follows the SI Social Media Guidelines, SI Directive 814, but includes Libraries - specific strategies, guidelines and practices. Any guidelines found in SI 814 supersede those found here. All staff should review and understand the policies found in SI 814 before engaging in social media participation for the Libraries. SI 814 includes guidelines for personal social media activities, as well as lays out specific content requirements and restrictions.

Social media is an umbrella term that encompasses websites that integrate technology, social interaction, and content creation and dissemination. Social media includes a variety of forms such as blogs, Wikis, photo and video sharing, podcasts, social networking, mash-ups, and virtual worlds. Unlike our traditional online forums, social media platforms give SIL the opportunity to connect directly with our users, fans, and friends, as well as to connect with each other. Social media allows us to easily and quickly share information, generate ideas and participate in discussions.

STRATEGY

Mission-related goals

Our strategic plan put forth a vision for SIL, which included the following:

- SIL creates a compelling environment for connecting, collaborating and exploring across disciplines and information boundaries.
- SIL enhances and eases the discovery of information in our collections for SI scholars, researchers, scientists, and the larger world of learners.
- SIL understands and meets user needs, serving users where they live and work.
- SIL builds expertise on information discovery, navigation and management.
- SIL ensures its success through increased financial strength, effective administrative support, and organizational excellence.

This vision provides a framework for the specific use of social media by the Libraries.

Audience

Social media lets us connect with existing audiences and hopefully create new ones.

Existing Audiences (as identified in reporting tools): Colleagues in the library and museum world, colleagues at the Smithsonian, SIL staff, hobbyists/enthusiasts (e.g., sewing machine collectors), taxonomists and other scientists, history and art enthusiasts, and the general public in the 35-50 age range.

Content and interactions are currently tailored to appeal to our existing audiences, and we will measure performance to see if we are retaining, engaging with, and expanding our existing audience. We will be implementing various methods such as informal polls and contests to find out more about our audience, as well as analyzing metrics from each platform to gauge if our audience is changing.

New Audiences might include: Library students, News outlets, Researchers, or college students

Based on how we want to grow our audience, each platform may choose to target new audiences by adding or modifying content or reaching out to specific groups by friending/following thought leaders or members in those groups (among other strategies).

Platforms

Though there are many social media platforms, SIL has chosen initially to focus our energies on 3 major platforms: blog, twitter, and facebook. As we become more adept at using these platforms, we will expand to others, as vetted and chosen by the SIL Social Media Group. Any platform may be tested in an "experimental" phase by one or more staff to gauge how easy it is to use, how easily it can be integrated into existing social media activities, potential audiences, and whether its use can help us meet our strategic goals.

Each of the individual platforms has platform-specific operational procedures and goals. These are included in the appendices. As additional platforms are added, operational procedures and goals will be created for those platforms.

Goals and Strategies

Our goals include publicizing the mission and work of the Smithsonian Institution Libraries, connecting with and growing our online audience, and promoting use of social media for work among staff.

Twitter:

Goals include fostering dialog with our audience, promoting our services and resources, and testing the potential for twitter to act as a conduit for 'help desk' or 'ask a librarian' type services.

Strategies include asking for user feedback, asking questions on specific topics and services, live tweeting SIL-sponsored events, complementing blog entries with related tweets, posting job/internship notices, highlighting special projects at SIL, tweeting facts about SIL and our services.

Facebook:

Goals include promoting SIL collections and services and connecting with and learning more about users.

Strategies include promoting events through postings, cross-promoting blog content, creating quizzes and contests, asking questions of fans, having 'interviews' or 'ask a librarian' posts with staff to highlight our behind-the-scenes work, and mining facebook insights to find out more about our fans and their interests.

Blog:

Goals include helping readers discover SIL content on the web, learn about readers/users by engaging in conversation whenever possible, inform readers of SIL events and services, get SIL staff to engage in social media, connect and inform staff about activities within the Libraries.

Strategies include creating posts that highlight SIL content on the web, promote events, or give a view behind the scenes via staff/intern or researcher profiles; profile staff activities, presentations and special projects; encourage 1/3 of SIL staff to create at least one blog post per year; encourage staff to subscribe to the blog updates.

Measurement

Measurements will be defined for each goal and detailed in the platform specific operational guidelines. Various third party tools may be used to measure success, depending upon the needs and best practices for each platform. For our initial measurements, the twitter and facebook groups will generate statistics from our HootSuite Pro account. Both traditional statistics and anecdotal metrics/narratives will be collected. Anecdotes should be posted to either the internal Social media or staff highlights blog, and metrics will be collected and reported centrally by SIL Web Services staff on a monthly basis.

Additional monitoring of metrics should be undertaken when testing out a new platform or a new strategy on an existing platform as well as when significant changes in activity are observed.

Level of User Engagement

There will be a baseline of User Engagement for each platform, but all should take into account that social media participants expect rapid responses, and timely communication must be a priority with social media. It is expected that SIL staff will actively participate/monitor discussions during the work week (M-F, 9-5) but do not have to actively participate outside of those work hours unless it is related to a work-related event or activity on the weekend.

Platform coordinators should also monitor mentions, searches or other references to SIL and our activities through tools like Google alerts, twitter searches for @silibraries, etc.

If staff do notice mentions, discussions, or relevant content that should be posted or responded to on the weekends, *the coordinator of the relevant platforms should be contacted* to make the post/comment etc. Social media chairs and/or their designates may wish to occasionally check feeds or notifications on the weekend.

ROLES AND RESPONSIBILITIES

Under the umbrella of the Digital Library Coordinators Group, the Social Media Group will coordinate SIL's participation in social media. The group will provide:

- Chair(s) to coordinate overall activity and report up to the Digital Library Coordinators and to the SIL Executive Committee. Chair(s) will also harmonize SIL social media activity with the rest of SIL's outreach and communication efforts and participate in pan-Institutional social media groups and initiatives. Chair(s) will also ensure that each platform and appropriate contact information is properly registered with Smithsonian Archives.
- A coordinator(s) for each platform to call meetings, report on statistics, and keep apprised of revisions in SI Policy or practice for that particular platform. Ideally, coordinators should reach out to other SI platform participants to share ideas.
- Platform content providers (bloggers, tweeters...) for each platform, hereafter referred to as 'authors'. Depending on the platform, authors will either have access to a common SIL account, or will use their own account to disseminate content on a fixed schedule, as set forth in the specific operations guidelines. All SIL staff will be encouraged to participate in our social media activities.

The coordinators and members of each platform subgroup will maintain operational documents specific to their platform. These documents will guide the day-to-day functions of the blog, Facebook and Twitter accounts. They are available on the SIL Social Media sharepoint page and by request to anyone outside of the Institution.

Accounts and passwords

Each platform will have an admin account, with the password maintained by the platform coordinator(s.) A copy of the admin account and current password should also be given to the chair(s) of the Social Media group, the SIL Webmaster and the Assistant Director for Digital Services Division for emergencies.

CONTENT GUIDELINES

Content and Tone

Special note should be paid to the Content Requirements listed below. With that in mind, each platform may have specific areas of content that should be covered regularly – those are listed in the operations documents.

Authors should feel free to use their own voices when creating content for SIL, however we expect that voice will be professional and respectful, while striving to be engaging and exciting. In general, social media communication is less formal than other communication styles but authors should always be clear, accurate, and informative.

Content Requirements and Restrictions (taken from SI SD814)

- Content must not be posted that is off-topic, partisan-political, contains personal attacks, or is otherwise abusive, threatening, unlawful, harassing, discriminatory, libelous, obscene, false, pornographic, infringes on the privacy or other rights of any third party, or otherwise falls within the prohibited categories set forth in SD 931, Use of Computers, Telecommunications Devices and Networks;
- Content must not be posted that is confidential, proprietary, intended to be pre-decisional and internal or that might prematurely reveal non-public Smithsonian information to the public;
- Political or religious messages or endorsements of political parties, candidates or groups, or comments that might be construed as lobbying must not be posted;
- Express or implied endorsements of non-Smithsonian products, services or entities, including contractors and their products and services, are not permitted;
- Content must not be posted if it invades another person's privacy or includes personally identifiable information ("PII"), unless prior consent has been obtained from the owner of PII. PII refers to information about individuals maintained by the Smithsonian, including information which can be used to distinguish or trace an individual's identity and any other information that is linked or linkable to an individual, such as medical, educational, financial or employment information. Examples of PII include, but are not limited to: (a) contact information such as full names, maiden names, or aliases; (b) address information such as street and email addresses; (c) personal identification numbers such as Social Security number, passport, driver's license, taxpayer identification, financial account, and credit card numbers; (d) security information such as passwords, mother's maiden names, etc.; (e) personal characteristics such as photographs that identify individuals, fingerprints, handwriting, etc., or biometric data such as retina scans, voice signatures, and facial geometry. For questions, contact the Smithsonian Privacy Officer;
- Images of recognizable children who appear to be under age 18 should not be posted unless a parent and/or guardian has given written consent to post the image; in consultation with OGC, exceptions may be justified for non-commercial use of crowd shots in which children are present;
- Content with known restrictions, such as copyright, trademark, privacy, contractual, or other restrictions as set forth in SD 609, Digital Asset Access and Use, must not be posted; if restrictions are unclear or unknown, consult OGC prior to posting;
- For content the Smithsonian does not own or have permission to use, is not in the public domain, or when the posting is not a fair use, permission must be obtained before posting third-party content on a

social media site. Note that a license granted to the Smithsonian to post content on a Smithsonian website may or may not support posting the content on third-party social media sites. Questions should be directed to OGC or OCon&PPM;

- Each unit is responsible for checking necessary provenance and related records, and for obtaining necessary clearances before posting Smithsonian content;
- For content that requires prior permission to be posted (e.g., under the terms of a contract, license, or release), a retrievable record of the clearance process must be maintained;
- Calls for entries, contests, give-aways, or sweepstakes on social media sites require prior review by OGC; and
- Links from social media accounts to third-party websites shall conform to the linking rules set forth in SD 950, Management of the Smithsonian Web.

Accuracy

Every effort should be made to ensure posts/comments from staff are accurate and thoroughly researched. While there may not be enough space to inform the follower when information is tentative or not verified, efforts should be made to inform when accuracy cannot be determined.

Corrections

If a mistake is made, it should be corrected in an honest and transparent manner. This includes errors in accuracy as well as accidental posts and other minor goofs. Mistakes found by the public should be respectfully acknowledged and the corrections attributed (after being verified.) If absolutely necessary, the removal of posts, tweets, etc. should be transparently acknowledged.

Comments and Questions

All comments will be monitored or moderated when possible. If a question is received, all effort should be made to answer that question promptly, and by replying to the asker via the original platform *and* directly if possible (e.g., via direct tweet or facebook message.)

Ideally questions and comments should be answered within two hours. If that is not possible, no more than 24 hours should go by without a response from (excluding weekends) even if that response is a simple acknowledgement of receipt of the question. For platforms that have multiple staff monitoring and/or providing content, when an individual starts their specified monitoring period, they should check for any unanswered comments or questions received prior to their shift. This individual is then responsible for answering those questions and comments.

Terms of Use

A link to the SI Terms of Use page should be included somewhere on each platform if possible. SI Terms of Use specifically address many important content issues. Highlights include:

Interactive Features and User-Generated Content

The Smithsonian provides certain interactive features, such as blogs, for the exchange of ideas and information by visitors in furtherance of its mission. Accordingly, the Smithsonian encourages you to interact with its site, subject to the following conditions:

...

You will not post any content that is off-topic, partisan-political, contains personal attacks or expletives, or is otherwise abusive, threatening, unlawful, harassing, discriminatory, libelous, obscene, false, pornographic, or that infringes on the rights of any third party.

...

You will not insert your own or a third party's advertising or promotional content into your posting. You understand that **the Smithsonian may monitor or review discussions, chats, postings, transmissions, bulletin boards or any other postings from time to time.**

...

The Smithsonian reserves the right to monitor content or information provided by website visitors in its sole discretion, to edit or remove any content that, in the Smithsonian's judgment, does not comply with the foregoing rules. The Smithsonian is not responsible for any user-generated content that is posted on the SI Websites or for any failure or delay in removing such content.

Crisis contingency

Each platform will have a crisis contingency plan. In general, if an author encounters violations of the SI Terms of Use by social media participants, they should refer immediately to the platform-specific contingency plan, and contact the chairs of the social media group if they want additional help. If they feel in any way threatened, or the crisis is not covered in the plan, authors should feel free to immediately contact the Office of the General Council either through the OGCHelp resource account in Outlook, or by calling one of the OGC attorneys.

It is not necessary, but recommended, that the social media chairs consider creating accounts using the SIL name for social media platforms that we do not plan to use to avoid others claiming that name.

Records Management Practices

Will vary platform to platform but should comply with SI Archives Record Management Practices. Issues addressed should include how access will be preserved if content is moved, who is responsible for moving content and where it should be stored, and backup of third-party hosted content (especially images and video.)

Archiving and Closing the Account

For many common social media platforms, the Smithsonian Archives is responsible for periodic archiving of content for each unit at the Smithsonian including the Libraries. Platform managers should check the SIA Sharepoint site to make sure that their platform is covered by SIA. If not, managers should detail the process for archiving a social media account/presence in the operational procedures. If a platform or account is no longer supported, or is to be abandoned for strategic reasons, always contact SI Archives before taking action to find out if they have a recommended tool or guidelines on how to preserve account information.

APPENDICES

SI DIRECTIVE 814 GUIDELINES FOR PARTICIPATION IN SOCIAL MEDIA SITES

BLOG STRATEGY AND OPERATIONAL GUIDELINES

TWITTER STRATEGY AND OPERATIONAL GUIDELINES

FACEBOOK STRATEGY AND OPERATIONAL GUIDELINES

If you are interested in adapting any of our guidelines for use in your library please contact us via email AskaLibrarian@si.edu, twitter @silibraries or on facebook www.facebook.com/SmithsonianLibraries and we would be happy to provide you with copies of our operational guidelines, or just chat.