# SAMPLE Plan for Social Media Engagement
# [Fill in blanks and adapt to your government entity's needs]

**1. Agency/Department/Section/Unit [Who is considering using social media?]**

**2. Proposed Timeline: [Include anticipated launch date, project milestones, and if applicable, termination date]**

**3. Contact** [Person who will be responsible for account]

       Name:

        Title:

      E-mail:

      Phone:

**4. Identify the social media platform on which you would like to participate [Fill out a new plan for each social media platform.  Different platforms present different challenges]:**

## 6. Description of Strategy

Social media can provide opportunities for communication and interaction with public, but entering this space also requires a commitment of time and resources to maintain relevance and cultivate relationships on these platforms. Government entities are encouraged to set clear goals and objectives for utilizing social media. Consider the following:

Who are you aiming to connect with?  Identify your target audience.

How are other agencies, the public, staff, and your leadership affected by use of this social media?

How will this strategy affect your overall mission, goals, and objectives?

## 5. Agency Stakeholders

To ensure agency goals and objectives are aligned, it is important to identify your stakeholders. Consider how various stakeholders are affected by the agency's decision to employ social media. Have you talked with (check all that apply and insert contact person):

☐ Communications: _____

☐ Information Technology: _____

☐ Legal: _____

☐ Program(s)/Business Unit(s): _____

☐ Records Management: _____

☐ Other Areas or Offices: _____

Add additional areas or offices within as dictated by your specific mission, goals, and objectives.

**7. Content Management**

Which positions will be responsible for content creation and editing? Consider implementing standards to ensure implementation accuracy, syntax and the removal of outdated information. Take steps to ensure that inappropriate material is not posted on your page by limiting who has access to your social media account and providing guidelines or an approval process for posting material.

Will platforms require moderation?

How frequently content will be updated?

What level of participation will be given to followers/visitors/users on social media platforms?

## 8. Public Records and Accessibility

Consider the public records impact of your use of social media and develop a policy and post relevant portions on your page to set expectations. Remember that material posted on social media sites is outside of your control, as the site can delete it at any time. There is no one way to handle these records. Some considerations:

1. When setting up your account, will you allow users to comment?
2. If so, do comments fall under correspondence retention schedules?
3. How do you treat vulgar/offensive/spam comments?
4. Also consider the content of what you plan to post and determine whether it is a public record:
   a. Does it meet the definition of a public record?
   b. If you are simply posting content or links to content maintained elsewhere, the social media page may be considered a copy of an existing record.
5. Consider whether there will be a need to prove that you posted the record via social media. For example, if you are using the social media to meet a notice requirement, you want to preserve a record of that posting, even if it isn't otherwise required.
6. If you are posting unique content, how are you going to make sure those records are maintained? One way would be to print out or save a PDF of material posted. However, given the dynamic nature of social media, this may prove to be difficult.
7. Consider establishing a retention schedule for material posted on social media accounts.
8. Assign an individual/group the responsibilities of managing content per the approved retention schedule.
9. If the material on your social media page requires long term retention, remember that the social media site controls the data. It is likely that the social media site will only allow access to material for a limited period of time.

Some sample language:

This site is intended to serve as a mechanism for communication between the public and the _____ on the listed topics. Any comments submitted to this page and its list of fans are public records subject to disclosure pursuant to Section 149.43 of the Ohio Revised Code.

The comments expressed on this site by non-state commentators do not necessarily reflect the official views of _____. Comments posted to this page will be monitored during regular business hours. _____ reserves the right to remove inappropriate comments containing, but not limited to, the following types of content:

- Vulgar, profane or offensive language and sexual content or links to sexual content
- Content that promotes, fosters, or perpetuates discrimination on the basis of race, color, age, religion, sex, national origin, military status, disability, genetic information or sexual orientation
- Spam or solicitations of commerce
- Content that advocates illegal activity
- Endorsement or advertisement of a vendor's products or services
- Content that supports or opposes political views, campaigns or ballot measures
- Infringement upon copyrights or trademarks
- Information that may tend to compromise the safety or security of the public or public systems

**9. Links, Endorsement and Advertising**

Your social media page may include links.  These links are outside of your control, but by virtue of the fact that you are posting them, an impression may be given that you are responsible for those pages.  Furthermore, if you allow comments, third parties can provide links.  In addition, Many social media sites have third party ads that are selected by the site and not the user.  Government entities should take care to avoid the appearance that the entity endorses or profits from these third party links or ads.  Consider a disclaimer to set users' expectations about links and ads.

Sample Disclaimer:  For your convenience, this site may contain hypertext or other links to external Internet sites that are not provided or maintained by _____. Please note that _____ cannot guarantee the accuracy, relevance, timeliness, or completeness of these external sites.

In addition to material posted by _____, this page may include ads and suggestions for other profiles to view selected by [insert social media site] and links to third party sites included in user comments.  The inclusion of  these ads, profiles, and links is outside of the control of _____ and are not an official endorsement of any product, person, or service, and may not be quoted or reproduced for the purpose of stating or implying endorsement or approval of any product, person, or service.  _____ does not receive any revenue from any of these links or sites.

**10.  Social Media Branding**

To what extent does your agency utilize branding guidelines?  Consider backgrounds, colors, images, seals, logos, avatars, and fonts as possible items for branding.  Your presence online should complement your website as well as your marketing materials to produce a comprehensive brand.

**11. Internal Policy Review and Update**

Review existing agency policies and procedures to ensure alignment with any social media engagement plan, including policies that discuss the use of social media by employees, employee codes of conduct, IT and acceptable use policies, communications and media relations policies, and records management and retention policies.

**12. Training**

Develop a plan for training staff on policies and procedures and how to use agency social media accounts.

**13. Evaluation**

Agencies must consider how they will evaluate the success of using the social media platform. If the time your agency invests in developing and managing a social media tool is not proportional to the goals and objectives established, then a new strategy may be needed.

How will engagement metrics be tracked?

To what extent is the agency's use of social media achieving the goals and objectives originally established for its use?