

## Strategies for managing social media information: How to keep records of government social media business

State Records has developed this draft set of advice called *Strategies for managing social media information*.

With so much government business taking advantage of the opportunities offered by social media, this advice explores the issues, opportunities and options for managing social media information.

This guidance contains a range of strategies, examples and case studies to help you determine:

- what business information is being generated by your corporate social media accounts
- [the risk and long term business value of this information](#)
- [the different recordkeeping strategies that should be used to capture and keep social media records](#)
- [how long different types of social media records need to be kept](#).

The guidance has lots of advice and examples but we would love your feedback to make it as practical and as helpful as it can be. We would particularly like feedback from frontline staff working with social media. We genuinely want all comments and advice, big and small, particularly on issues we have missed or misinterpreted. We would also love feedback on how we can better structure this guidance so that it is clear and easy to use.

All comments should be submitted by Friday 15 March 2013 to [kate.cumming@records.nsw.gov.au](mailto:kate.cumming@records.nsw.gov.au) or to the comments area on the [Future Proof blog](#).

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## **Section 1. Strategies for managing social media information**

### **Government business is moving to social media**

Important government business is moving to social media applications.

Social media is a group of online applications such as social networking sites, wikis, blogs, microblogs, video and audio sharing sites, and message boards that allow people to easily publish, share and discuss content. (NSW Department of Education and Communities *Social media guidelines*, 2011)

Key government drivers such as the [NSW ICT Strategy](#) encourage widespread use of social media for government business to:

- improve customer services
- increase access to information, and
- involve the community directly in government decision making.

### **If business is moving, information is moving too**

As business information moves to being created or received via social media platforms, organisations will rely on the ongoing accessibility of social media-based business information to support clients, business operations, reporting and public accountabilities.

### **Social media applications are third party owned and located in the cloud**

In general social media applications are:

- third party owned
- located in the cloud
- subject to regular change, and
- unable to be relied upon to maintain high risk or long term business information.

### **Therefore, if you need the business information that is moving to social media, you need to make plans for how you will manage it**

With increasing business mandates for social media use and with large numbers of government organisations adopting social media applications, it is important for all organisations to consider what corporate and business information is moving to social media platforms and to develop strategies that ensure this information is maintained and accessible as required.

#### **Example: Important business information is already residing in social media applications**

- many members of the public are engaging with government via social media and are asking significant questions of government and its decision making processes via social media channels
- public consultation on significant policies, development proposals etc is already taking place on social media
- social media is now a prime means of communication and advice in emergencies, such as flood and bushfires

**Example: NSW Government business is already moving: results of [State Records social media survey](#)**

In a May 2012 voluntary survey of NSW public offices, State Records found that 80% of responding organisations reported using social media.

Facebook and Twitter were the most popular social media channels (77% and 63% of respondents), with YouTube, Yammer and wikis not far behind.

60% of respondents do not capture records of their social media business activities, and 20% only sometimes capture records.

17% of respondents reported that they had already lost records of their social media operations.

**What this guidance does**

This guidance will provide you with advice on ways you can ensure that your organisation has the information it needs from its social media applications to sustain its business operations.

This guideline contains a range of strategies, examples and case studies to help you determine:

- what business information is being generated by your corporate social media accounts
- the risk and long term business value of this information
- the different recordkeeping strategies that should be used to capture and keep social media records
- how long different types of social media records need to be kept.

This guideline is an extension and update to State Records 2009 advice, [Records Management and Web 2.0](#).

**Examples of different types of social media applications commonly used in Government, and what they are being used for**

**Micro-blogging sites**

Examples:	Twitter, Yammer
Used for:	<ul style="list-style-type: none"> <li>• providing advice or updates to users and/or staff</li> <li>• consultation</li> <li>• issuing media releases and public statements</li> <li>• promoting online content and resources</li> <li>• promoting events or services</li> <li>• emergency broadcasts</li> <li>• creating communities of interest</li> <li>• providing a mechanism for open feedback</li> <li>• answering enquiries</li> </ul>

	<ul style="list-style-type: none"> <li>identifying sources of internal and external knowledge and expertise</li> <li>building knowledge and awareness</li> </ul>
See:	State Records NSW Twitter account: @srnsw

### Social and professional networking sites

Examples:	Facebook, LinkedIn
Used for:	<ul style="list-style-type: none"> <li>providing advice or updates to users and/or staff</li> <li>internal networking, collaboration and education</li> <li>consultation</li> <li>receiving public enquiries and feedback</li> <li>issuing media releases and public statements</li> <li>promoting online content and resources, including multimedia resources</li> <li>promoting events or services</li> <li>emergency broadcasts</li> <li>creating communities of interest</li> <li>sharing knowledge and experience</li> </ul>
See:	<a href="#">NSW Police Facebook page</a>

### Video and photo sharing websites

Examples:	YouTube, Flickr, Pinterest, Instagram
Used for:	<ul style="list-style-type: none"> <li>sharing and promoting resources</li> <li>promoting events or services</li> <li>making government information more broadly available</li> <li>enhancing the accessibility of government services</li> <li>sharing client experiences</li> </ul>
See:	<a href="#">Consumer, Trader and Tenancy Tribunal YouTube channel</a>

### Weblogs or blogs

Examples:	Tumblr, Blogger, WordPress
Used for:	<ul style="list-style-type: none"> <li>corporate communication</li> <li>public advice and feedback</li> </ul>

	<ul style="list-style-type: none"> <li>• providing a central location for discussion and feedback</li> <li>• regular reporting on a project, program or strategy</li> <li>• building an online community</li> <li>• sharing knowledge and expertise</li> </ul>
See:	<a href="#">Archives Outside blog</a>

### Wikis

Examples:	Wikipedia
Used for:	<ul style="list-style-type: none"> <li>• project management</li> <li>• peer review of documentation</li> <li>• public review of documentation</li> <li>• enabling cross-organisational collaboration</li> <li>• collaborating with external business partners</li> <li>• sharing of large amounts of business-specific information</li> <li>• tracking changes to documentation</li> <li>• building knowledge and communities</li> </ul>
See:	<a href="#">US State Department Diplopedia</a>

### Forums and discussion boards

Examples:	Google Groups, Ning, Whirlpool
Used for:	<ul style="list-style-type: none"> <li>• professional networking</li> <li>• internal networking</li> <li>• virtual learning</li> <li>• information sharing</li> <li>• developing communities of practice</li> <li>• disseminating timely information</li> </ul>
See:	<a href="#">Archives Live Ning</a>

### Collaborative editing tools

Examples:	Google Docs
Used for:	<ul style="list-style-type: none"> <li>• project management</li> <li>• peer review of documentation</li> <li>• enabling cross-organisational collaboration</li> </ul>

	<ul style="list-style-type: none"><li>• reducing ICT costs and infrastructure</li><li>• tracking comments, versions and changes to documentation</li></ul>
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Examples above drawn in part from State Records [Records Management and Web 2.0](#)

## **What you need to do to implement effective social media recordkeeping in your organisation**

1. Understand the specific information risks that apply to social media
2. Know what your organisation is doing with social media
3. Develop a social media information strategy
4. Support your organisation's use of social media with a policy, a policy that supports recordkeeping
5. Be proactive
6. Keep an eye out to see how social media systems evolve

### **1. Understand the specific information risks that apply to social media**

#### **Case study: Free services are great, but they can disappear**

iGoogle, a free Google service that offered users the ability to build a customised home page, could be used as a personalised social media monitoring tool. In July 2012 Google announced it will shut down iGoogle in November 2013. Developing strategies to export relevant social media information and incorporate it into relevant business processes and systems is important for maintaining business and information continuity.

Source: <http://www.ghacks.net/2012/07/03/google-to-retire-igoogle-on-november-1-2013/>

#### **Case study: Terms and conditions of online services can change**

Instagram's decision to change its terms and conditions so that after 16 January 2013 it will have the right to sell user's content to advertisers without permission, is an example of how user rights and permissions can change radically in social media systems. While you may not be able to control how others use your social media information, you can develop processes to ensure you have your business information whenever you need it. Maintain control over your social media information by exporting this information out of social media systems and importing it into environments that are under corporate control. Source: <http://www.bbc.co.uk/news/technology-20767537>

#### **Case study: But you don't need to panic – not all social media records need to be captured and kept**

State Records NSW runs a [Facebook page](#) for its Future Proof strategy. This Facebook page duplicates the information posted to the @FutureProofNSW Twitter account. No information is posted specifically and uniquely on Facebook. \* Recordkeeping strategies are in place to capture and keep Twitter records. A very limited number of comments are received on the Future Proof Facebook page. An RSS feed has been set up which enables

these comments to be sent as emails to a defined account and these records are captured into the corporate records management system. Therefore, as:

- the information on Facebook is generally duplicated elsewhere
- the information does not need to be kept long term
- Twitter and email already have defined recordkeeping strategies
- the organisation is prepared to accept the risk that Facebook makes no guarantees of the long term accessibility of the information it hosts

the decision has been made that the Future Proof Facebook page does not need a defined recordkeeping strategy. The organisation has made the business decision to leave these records in Facebook and rely on Facebook to keep them accessible.

\* Please note that simply copying and pasting to Facebook is not social media best practice! We apologise to Facebook fans but this is all we can manage at the moment!

### **Know what your organisation is doing with social media**

In many organisations there is no coordinated, overarching strategy for social media use. Social media technologies are adopted by different business areas without reference to corporate policies or strategies and without considering the information management requirements for the business they are performing.

This approach can lead to information loss or process duplication, as a lack of corporately available information means staff reproduce effort or operate without all information available to them. It can also mean that important, long term value business information can easily be disappear.

It is therefore important to identify all uses of social media technologies across your organisation and to develop an information management strategy that encompasses all areas of your social media operations.

#### **Tip: Develop a social media hub**

A social media hub is a central location on your website, intranet or other accessible corporate location that lists and identifies all your organisation's different social media sites. One of the challenges of social media recordkeeping is that often there is no consolidated listing of all an organisation's social media sites. Social media sites are developed by specific business areas for particular projects or communities and often other business areas are unaware of their existence. A hub structure that identifies where these sites are, who has corporate ownership of them, the business area the sites support will promote these sites internally and will also simplify the recordkeeping and other administrative tasks that must be applied to them.

The US Department of Defence has an [extensive hub structure](#) for the many social media sites it hosts, as well as the policies and procedures that support these sites.

The social media sites for the different components of the Defense community sit within this hub structure. See for instance the [US Army's social media registry](#).

#### **Tip: When identifying social media systems, be aware that social media is more than Twitter and Facebook**

When looking to manage the business information that is moving to social media, think broader than Facebook and Twitter. Strategic and high risk processes like project management, stakeholder collaboration and joint ventures are utilising wikis and

collaborative editing tools, while information for client support and education is moving to YouTube. If your organisation is adopting these types of technologies, make sure you develop strategies to help ensure the effective management of this business information, as well as the information in Twitter and Facebook.

**Example: Some organisations are adopting social media business systems**

Organisations that have a significant social media presence or that need to broadcast large numbers of emergency messages are starting to utilise off-the-shelf or purpose-built business systems that are used to generate content and then automatically broadcast this through various social media channels. For business systems that have the capacity to broadcast through multiple channels:

- information will generally be secure in these systems for the length of the system lifespan, but if the system is upgraded, replaced or decommissioned, you will need to determine if any information in the system needs to be kept for ongoing business or legal purposes.
- you may choose to regularly export high value information out the system throughout its active life and store this in a central records system, rather than determine at system decommission what information requires export or migration for ongoing support and management.

It is important to note that some social media communications, like emergency broadcasts, can have very long legal retention periods, up to 25 years in some cases. An important part of social media recordkeeping strategies therefore is, when business moves to social media platforms, to determine what you need to do in order to keep the records generated in your social media systems for your required retention periods.

**Develop a social media information strategy**

A social media information strategy will enable you to:

- comprehensively identify what business processes are moving to social media
- determine what information generated via social media is needed to support these business processes
- identify the legal and business information use and retention requirements that apply to your social media operations
- identify the client needs, expectations and public accountabilities that apply to your social media operations
- identify the business areas in your organisation that need to access, reference, respond to, use or reuse the information generated via your social media channels
- identify and manage the information that your organisation needs long term access to
- identify appropriate recordkeeping strategies for high risk, high value business information
- identify the business records that can stay in their native social media applications

Assessing and understanding each of these will help you to comprehensively determine how your organisation’s social media information can best be captured and managed.



### **Tips for understanding information needs**

In the transition to a social media working environment, it is easy to overlook information management as a key business consideration. When moving to social media you need to understand the information needs of:

- staff working with social media
- business staff who need social media information to perform, account for and improve the services they offer
- staff working in other business areas who need access to social media information for reporting or other business purposes
- clients and other members of the public who may have expectations for how the information they contribute will be used

Developing strategies to ensure these information needs are met will involve:

- talking to staff about what information they need to perform their roles
- mapping current information flows, reporting requirements, accountability requirements
- assessing client needs and expectations
- examining the information that was needed and used by staff before the business process moved to social media
- identifying and implementing an effective recordkeeping strategy – see [How do I capture social media records?](#) for more information

## **4. Support your organisation's use of social media with a policy, a policy that supports recordkeeping**

Once you have a social media information strategy, you should have a social media policy that supports it.

Your organisation should have a policy that outlines:

- how organisational business will be performed through social media channels
- the corporate code of conduct for social media use
- public terms of use for your social media channels, and
- the information that needs to be captured to support your social media operations.

Here are some NSW government social media policies:

- See [Department of Education and Communities social media policy](#) - also available on this site is a collection of excellent guidance and advice on creating and sustaining a social media presence
- See [Consumer, Trader and Tenancy Tribunal social media page](#) which includes reference to its social media policy and guidelines and its social media terms of use

The [Online database of government and non-profit social media policies](#) contains hundreds of sample social media policies from around Australia and across the world.

### **In your policy, be clear about what is and isn't acceptable, and what is and isn't possible**

In your social media policy and guidelines you can let people know when staff will be available for discussions, what they can and can't discuss.

This is an important part of your social media information strategy as it gives you the authority to remove inappropriate or offensive content from your accounts.

**Example: Consumer, Trader and Tenancy Tribunal**

The CTTT is a court and so has limitations to the types of advice it can provide to the public. It makes these limitations very clear in its social media policy.

“It is paramount that the CTTT’s dealings with parties are carried out in a way to that ensures one party does not have an advantage over another. This is why, for instance, the CTTT cannot provide legal advice or tell a party how to prepare their case. Parameters need to be in place so that there is no real or perceived conflict of interest in the way the CTTT deals with cases and privacy and confidentiality requirements are met.”

Include acceptable use statements in your policy. These should make clear that abusive, defamatory or threatening behaviour, off topic posts, political discussions or posts that encourage inappropriate or law-breaking activities may result in users being banned from your social media channels.

**Example: Consumer, Trader and Tenancy Tribunal**

The CTTT has included the following statements in its *Social media policy* and its *Social media terms of use*:

“The CTTT reserves the sole right to review, edit and/or delete any comments the Tribunal deems inappropriate. Comments including, but not limited to, the following may be deleted or edited by an authorised CTTT officer/s:

- abusive or hurtful comments about another person or CTTT officers, which may include:
- inappropriate language (e.g. profanity, racial, ethnic or gender-based language)
- personal attacks or defamatory statements or comments (e.g. negative personal or untrue comments about a person), instead of just criticising his/her posting, opinion or comments
- irrelevant and redundant comments (e.g. promotion of events, groups, pages, websites, organisations and programs not related to or affiliated with the CTTT)
- comments that violate the privacy of Tribunal members, CTTT staff, parties or stakeholders.

Persistent inappropriate use of the CTTT’s social media platforms will lead to the user being blocked and/or reported to the YouTube, Facebook or Twitter Administrator for breach of their terms of use.”

**Tell staff and the public that relevant records of social media activities will often need to be kept**

Tell staff that they may have responsibility for capturing and keeping the records they make via social media.

It’s important in your policy too to let people know that, if they are needed for business operations or client support, you will be keeping records of your social media operations and that these records may contain publicly available personal information, such as a Twitter handle or Facebook account name.

**Make your policy available online**

Social media is a public forum. Your corporate rules for engaging in this environment should be publicly available.

## **5. Be proactive**

In most organisations, social media information needs to be managed now. It is important not to wait for the perfect social media strategy or system.

Instead it is important to:

- act now
- test strategies
- refine approaches
- gradually build strong information management and governance frameworks

## **6. Keep an eye out to see how social media systems evolve**

At the moment your organisation's social media presence may be very low key and may focus on pushing out designated media releases to the community.

It is important, however, to keep a watching brief on your social media systems. These systems are very dynamic and how your organisation uses them can change quite rapidly. These changes can be driven by the community who might start to use your systems in different ways or they can be driven by staff who want to maximise the potential of social media.

If use of your social media systems start to change, you need to look at your current social media information management strategies and determine whether these also need to change.

Things to look out for include:

- Are members of the community starting to ask specific questions about policy or services on social media?
- Are you receiving compliments or complaints via social media?
- Are staff members providing advice about new policies or programs via social media?

If these changes start occurring then your organisation's information needs might change too. This is because you may now need the information from your social media system:

- as input into policy or program development
- as evidence of how a question or complaint was handled
- to give to business areas as part of workflow processes
- to enable effective client management.

As information in social media systems is not stable, if your business use of social media is changing, you may need to start to schedule regular exports of your social media transactions to ensure your organisation is able to access and use the business information it is receiving via social media.

## **Section 2: Strategies for managing social media information – determining what records need to be captured**

If your organisation is:

- pushing business information through social media channels
- receiving business-related communications through social media
- building an official business presence in any social media system

then your organisation has legal (including under the *State Records Act*) and business requirements to be able to account for the business it is transacting via social media.

Organisations do however use social media in a variety of different ways and they use it for various different types of business operations. Some forms of business are low risk and need minimal levels of documentation. Others are more high risk and need to be supported by more rigorous forms of recordkeeping.

For low risk forms of business that are moving to social media, the information generated by this business generally has limited ongoing value and can be safely left in your social media application.

High risk forms of business, however, will need to be supported by good information that has been extracted out of social media applications and into corporate business systems.

### **You don't need to keep everything...**

It is worth stating that government bodies do not have to keep records of every tweet or every 'like' or every minor social-media based interaction. But under the *Standard on digital recordkeeping*, you do need to identify your organisation's high risk business processes, identify the business systems that support these and ensure that these systems can make and keep records to document and support these high risk processes.

In social media applications, government business is taking place in external, third party hosted, web-based platforms. For the first time, key business information is not residing on internal IT systems but is possibly owned and hosted by others. For high risk processes, these systems are not going to keep your data for you, for as long as you have need for it. There are few longevity guarantees in social media systems and when your data is gone from these applications, it is gone. Therefore, where relevant, active plans have to be made to export data from these external platforms and bring it into corporate systems.

### **How do I know if my business is high risk and if I need to keep records of my social media activities?**

To determine whether you need to keep records of your organisation's social media business you could ask:

- Are business processes that are regarded as high risk, strategic or of core business value moving to social media?
- Will decisions made or communicated via social media commit the organisation to specific actions?
- Are key business processes that used to be performed by in-house business systems now being performed by social media?

- Are members of the public relying on the information you are posting to social media for advice or to inform their own actions or decisions?
- Will there be times that you will need to be able to demonstrate what specific information you posted on social media?
- Will you need to perform regular or annual reporting on your social media activities?
- Will the business want to reuse the information content you are generating using social media?
- Is there a lot of traffic on your social media site?

If you answered yes to many or all of these questions, then it is likely that significant business operations in your organisation are moving to social media and you will need to develop a social media information strategy to ensure this important business information is captured and kept as a corporate asset.

### **Case studies: Comparing different levels of business risk in social media**

Here are examples of different Twitter accounts with different levels of business risk attached to them.

These are included as examples of how different recordkeeping strategies can be deployed in your social media environments, based on the levels of risk that apply to the business you are performing.

<b>Department of Immigration – @SandiHLogan</b>	
<b>Business performed on this account:</b>	The Media Relations Manager at the federal Department of Immigration runs a very active Twitter account. This account is used to respond to media enquiries about the Department’s activities, including enquiries about immigration policy and detention centres.
<b>Types of records generated:</b>	Tweets from this account are generally individual questions and responses on Immigration issues. The account generates and receives many individual tweets each day.
<b>Do records need to be kept?</b>	Yes, it is important that records are made and kept of this Twitter account because: <ul style="list-style-type: none"> <li>• this Twitter account deals with a very high risk area of Government business</li> <li>• Immigration is a government function that is subject to high levels of media and public scrutiny</li> <li>• individual business questions are asked and answered via this channel</li> <li>• the Department will need to refer to its public statements on Immigration policy and practices for significant periods of time</li> <li>• the Department will need to report on the enquiries it</li> </ul>

	has responded to
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<b>State Records NSW – @FutureProofNSW</b>	
<b>Business performed on this account:</b>	This account is used to promote disseminate advice on good digital recordkeeping practice.
<b>Types of records generated:</b>	<p>Tweets are posted approximately once a week. The majority of tweets are auto-generated via RSS feed based on updated content posted on the Future Proof blog. There is infrequent user engagement with the Twitter account, with most of the activity being retweets of content, not specific questions or discussion.</p> <p>Some comments are made by users, however, which is useful feedback on the quality of State Records products and the extent to which they meet the needs of the NSW jurisdiction.</p>
<b>Do records need to be kept?</b>	<p>State Records is making and keeping records of its Future Proof Twitter account but it is a low level, low risk account that does not need a comprehensive recordkeeping strategy. Most of its content is replicated on the Future Proof blog site and this site does have a comprehensive recordkeeping strategy. Twitter comments are however fed back into content development and reporting processes and so recordkeeping processes support these workflows.</p> <p>Keeping the records of blog content which are duplicated on Twitter is a lesser priority. State Records does however keep a watching brief on the account and will update its recordkeeping strategy if use of the account changes.</p>

<b>State Records NSW – @srnsw</b>	
<b>Business performed on this account:</b>	<p>This Twitter account is very dynamic. Its tweets:</p> <ul style="list-style-type: none"> <li>• promote different parts of State Record’s archival collection</li> <li>• respond to research enquiries received through Twitter</li> <li>• engage with different allied archival institutions both in Australia and internationally</li> <li>• promote archiving and the archiving profession.</li> </ul>
<b>Types of records generated:</b>	This account is one of the key archival Twitter accounts, in Australia and overseas. It has thousands of followers. Many tweets are sent and received through this account each day.
<b>Do records need to be kept?</b>	<p>Yes they do. Given the official organisational business that is performed on this account:</p> <ul style="list-style-type: none"> <li>• marketing of State Records’ collections and services</li> <li>• liaison with clients and other archival institutions</li> </ul>

	<ul style="list-style-type: none"> <li>• responding to specific customer enquiries</li> <li>• receiving user feedback and advice</li> </ul> <p>and given this content is not replicated elsewhere, official business is being performed on the @srnsw account and records need to be made and kept of this.</p>
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## How do I decide which social media records to make and keep?

### Talk to staff

Talk to the business, communications or customer service staff who are using social media in your organisation. Understand the nature of the business that is being performed and what information, accountability or business requirements may apply to it. This will help you to determine what information you may need to support your business operations.

### Start by being risk averse

When you are just starting to use social media and when you may not have a full understanding of what information you need to support your social media business, it may be worth adopting a comprehensive information strategy.

This would involve exporting a full range of records out of your social media applications and into your corporate business systems.

This full set of information will enable you to fully benchmark your social media strategies, track the business performed in them and assess their impact.

This will provide an effective risk mitigation approach and this strategy can be re-evaluated on a 6 monthly or annual basis to determine whether this level of information management is helping to meet risk and business requirements, or, if on assessment, the risks posed by a specific social media account are not great, whether a less comprehensive information management approach would be advisable.

### Keep your plans focussed on business requirements

Recordkeeping compliance should not be the focus of the information strategies you develop to support social media.

Instead your strategies should be developed to capture the information your business needs to sustain and account for its actions, and to continue to deliver outcomes to clients.

## The qualities that make a good social media record

The State Records *Standard on full and accurate records* says that to be full and accurate:

- Records must be made
- Records must be accurate
- Records must be authentic
- Records must have integrity
- Records must be useable

<b>Full and accurate principle:</b>	<b>In a social media context this means:</b>
<p><i>Records must be made</i></p> <p>'A public office must ensure that records</p>	<p>To be made social media records need to be:</p>

<p>are made that document or facilitate the transaction of a business activity.'</p>	<ul style="list-style-type: none"> <li>regularly exported out of social media applications as records in native social media applications may have limited longevity</li> <li>regularly imported into corporate business systems</li> </ul>
<p><i>Records must be accurate</i>                  'All records made by the public office must be a correct reflection of what was done, communicated or decided. An accurate record is one that can be trusted as a true representation of the transactions or events which it documents.'</p>	<p>To be accurate social media records need to be:</p> <ul style="list-style-type: none"> <li>protected so that they can always be trusted as an accountable, reliable source of information. Making information 'read-only' is one possible way to achieve this, as are system controls, audit logs, user permissions or other functionality enabled by an electronic document and records management system or other business system, to help demonstrate that records are protected and are authentic</li> <li>maintained so that you can rely on the fact that the information presented in the records is the information that was transacted or recorded at the time</li> </ul>
<p><i>Records must be authentic</i>                  'An authentic record is one that can be proven:</p> <ul style="list-style-type: none"> <li>to be what it claims to be,</li> <li>to have been created or sent by the person claimed to have created or sent it, and</li> <li>to have been created or sent at the time claimed.'</li> </ul>	<p>To be authentic social media records need to:</p> <ul style="list-style-type: none"> <li>identify what social media channel they were received through</li> <li>identify the user account names of those involved in the communications</li> <li>provide a time and date stamp for the communication</li> <li>be routinely captured into official recordkeeping systems</li> </ul>
<p><i>Records must have integrity</i>                  'A record with integrity is complete and unaltered, now and in the future. It can be proven to have been managed appropriately through time.'</p>	<p>To have integrity social media records need to be:</p> <ul style="list-style-type: none"> <li>protected against unauthorised or inappropriate destruction</li> </ul>



	<ul style="list-style-type: none"> <li>• stored in appropriate systems</li> </ul>
<p><i>Records must be useable</i></p> <p>A record must be understandable, complete, retrievable and available through time.</p>	<p>To be useable social media records need to be:</p> <ul style="list-style-type: none"> <li>• linked to the business context</li> <li>• linked to records relating to the same business activity or transaction</li> <li>• accessible for as long as they are required</li> </ul>

### When do I need to capture social media records?

Social media systems are dynamic and the information in them is often subject to frequent change, addition or revision.

Where you need to make and keep social media records, you may need to identify the specific points at which you need to make records.

**Example:** Rather than capturing each specific tweet, State Records runs a monthly report of its tweets, retweets and likes and captures this as its official record.

**Example:** State Records captures an email record of each comment received on its Future Proof blog, as these comments are received and responded to.

### Case study: Consider what application-specific information components may make your records more full and accurate and more useable

You may need to define the type of records that you want to export. For example, a range of information is available on Twitter including:

- your profile
- your tweets
- @ mentions (when someone has mentioned your Twitter account specifically)
- favourites (when someone has nominated one of your tweets as their favourite)
- retweets (when someone has forwarded your tweet to all their followers)
- direct messages (when someone has sent you a specific message)
- followers (the name, picture and profile information of the accounts that follow your Twitter account)

You should consider which of these components you may need to keep information about in your Twitter records.

You may need to make similar decisions about other applications, such as Facebook or Google+, depending on the nature of the business you are performing in these environments. On Google+ you could consider whether you need to capture:

- your profile
- public posts
- comments
- details of your friends

- Google analytics data
- private posts
- photo albums
- circles showing connections between your various friends

Many of the cloud-based social media backup tools listed in the section *How do I keep social media records?* will allow you to configure reports or backups and select which of these application-specific information components you require in your records.

**Example: To help you decide which records you might need to keep, imagine a worst-case scenario**

To help you determine what records you might need to make and keep of your social media operations, it might help to consider a worst-case scenario. Ask yourself, if one of the social media channels you use were to disappear, what types of information might you require for your ongoing operations that currently is only kept on your social media sites. For example:

- Are some photographs only contained on your Facebook account and nowhere else?
- Are copies of corporate videos stored elsewhere other than YouTube?
- Do you need to know who were your friends or followers at a particular point in time
- Have all necessary comments been exported?

**Question: Do the social media records that I make and keep need to look exactly like they did online?**

No they do not. First and foremost, recordkeeping has to be achievable and sustainable. It also has to present information in an accessible, human readable way. Capturing data exactly as it looked in the system is desirable but not as important as achievability, sustainability and accessibility.

Some social media formats and presentation styles will be too difficult to replicate and keep. AJAX the format that Facebook pages are presented in is very complex. It is excellent for presenting dynamic, mixed content but could create a complex legacy problem if you wanted to manage data in this form indefinitely.

What is important is ongoing access to the business information for as long as you need it. The following section, *How do I keep social media records?* will provide some advice on how this can be achieved.

If for your business purposes it is important to keep a record of how your social media site looked at a particular point in time, then you can use screenshots saved in PDF as a way to make and keep this information.

### Section 3: Strategies for managing social media information: How do I capture social media records?

As social media is relatively new and rapidly evolving technology, there are no defined, best practice ways for making and keeping social media records.

Organisations also use different social media channels, in a variety of different ways and for various different types of business operations.

Given there are no easy answers for how you should capture and keep your social media records, you should choose the strategies that best meet your business needs and technological environment, while making a full assessment of the potential risks involved.

#### Tools and approaches for social media record capture

The table below lists a range of current recordkeeping strategies for capturing and keeping your social media information, and the pros and cons associated with each approach.

It is likely that use of a combination of these tools will build the most effective social media information strategy for your organisation.

Tool/approach	Pros	Cons
<b>Leaving data in its native social media application</b>	<ul style="list-style-type: none"> <li>No separate recordkeeping effort required</li> <li>No additional software or applications required</li> <li>Staff using the application will know how to access and use the information it contains</li> <li>Short term value information is not likely to be at risk</li> </ul>	<ul style="list-style-type: none"> <li>Long term value or high accountability information will be at risk due to projected frequency of system change</li> <li>Risks to ongoing information accessibility exist because information remains under the control of an external third party</li> <li>Limited corporate information accessibility if a log-in is required to view or use data</li> </ul>
<b>Using available APIs to regularly export your information from social media applications</b>	<ul style="list-style-type: none"> <li>Information is regularly exported into corporate system</li> <li>Corporate information is brought back into corporate control</li> <li>Exported information can be fed into all relevant business systems and processes</li> </ul>	<ul style="list-style-type: none"> <li>Technical knowledge is required</li> <li>APIs can change and so API-based export strategies may require regular update</li> <li>Different APIs will be required for each social media channel</li> </ul>
<b>Cloud-based back up system like <a href="#">Backupify</a></b>	<ul style="list-style-type: none"> <li>Free, basic online services</li> <li>Support a wide variety of social media applications</li> <li>Information can be regularly exported</li> <li>Corporate information can be brought back into corporate control</li> </ul>	<ul style="list-style-type: none"> <li>These tools are back up tools, not recordkeeping tools.</li> <li>Their interfaces and data exports are designed to satisfy IT and backup requirements, not business or recordkeeping needs. For example, Facebook data is exported by Backupify in JSON which meets backup needs but which is not readable or</li> </ul>

	<p>Some information is exported in open, non-proprietary formats (For example, Backupify generated Twitter reports are in PDF)</p> <p>These services work with a range of social media channels, including Google apps</p>	<p>accessible for standard business environments.</p> <p>With these tools, export of information out of social media applications is automated but downloading of this information out of the cloud is not. Downloading and capturing into corporate systems must still be performed as a manual, scheduled process.</p> <p>As they provide backup services, these tools generally download all your social media information, not information from a specific time period. The same legacy data will generally be downloaded each time you do a backup, resulting in significant amounts of duplication for high transaction accounts.</p>
<p><b>Cloud-based information services such as <a href="#">Social Safe</a> and <a href="#">Archive Social</a></b></p>	<p>Free basic online services, scaling to fees between \$US5 – \$29 per year for full service options</p> <p>Support a wide variety of social media applications</p> <p>Consolidate a variety of social media data into one exportable document</p> <p>Information can be regularly exported into corporate systems and into corporate control</p>	<p>The long term accessibility of the data presentation format requires investigation</p>
<p><b>Social media monitoring or dashboard tools</b></p>	<p>Many third-party, cloud-based tools are available for free, such as HootSuite</p> <p>Aggregate information from several social media channels</p> <p>Can piggyback information management needs on the back of existing reporting or monitoring arrangements</p> <p>Provide reporting and listening services to monitor the effectiveness and impact of your social media presence</p> <p>Aggregating and reporting functionality creates very</p>	<p>Limited information accessibility if a log-in is required to view or use data</p> <p>There may be limits on the reporting and analysis information that is available for export</p> <p>Key business intelligence and reporting information is contained in reports and analysis so exportability of this information needs to be verified</p> <p>Some organisations use licensed applications such as Radian6 and Alterion.</p> <p>While offering good functionality,</p>

	useful business information	these systems can be very expensive to deploy and the exportability of their information needs to be verified.
<b>Reporting tools that come with your social media application, such as Facebook Activity Logs</b>	<p>Free, online services</p> <p>Generally export to PDF and other widely open, accessible formats</p> <p>Capture all activities that occur on social media sites</p>	<p>Export needs to be manually performed</p> <p>Information is flat and not dynamically available to reuse or repurpose</p> <p>Need to determine whether information exports can be performed periodically, or whether full information downloads are performed each time.</p>
<b>Analytic tools, like Google Analytics or blog software analytics</b>	<p>Free, online services</p> <p>Useful for monitoring blog use, search engine terms, referring sites, top posts and pages</p> <p>Some information can be exported</p> <p>Some corporate information analysis can be brought back into corporate control</p>	<p>May not export reports</p> <p>May not export reports in business-ready formats</p> <p>May need to be supported with screenshots, written reports or other ways of capturing the business information they contain.</p>
<b>General third party, cloud-based reporting tools like <a href="#">Storify</a></b>	<p>Free, online services</p> <p>Can allow you to gather a range of disparate social media information sources into one place to tell a story</p> <p>Particularly useful for capturing different sets of online information about events or conferences</p>	<p>Export functionality may not be present</p>
<b>Use a purpose-built software tool</b>	<p>Can be designed to meet your specific business requirements</p> <p>Can be designed to integrate and share information with your corporate business applications</p> <p>Can provide a very comprehensive and accountable recordkeeping solution</p> <p>Information capture and management can be automated</p>	<p>Will take time and money to develop</p> <p>Will possibly need to be upgraded as social media applications and approaches change</p>

<p><b>RSS feed</b></p>	<p>Free</p> <p>Useful for a range of social media applications</p> <p>Useful for auto-populating Twitter and Facebook based on blog updates</p> <p>Can send an email containing a complete blog post to a designated account</p> <p>Can be configured so that certain events such as a blog comment, retweet etc will trigger an email to sent to a designated account and this email can then be captured as a record</p>	<p>Emailed records will require manual intervention to capture into corporate systems for accessibility and useability</p>
<p><b>Excel spreadsheets manually updated with social media information</b></p>	<p>Records can be kept</p> <p>Information can be kept in accessible formats</p>	<p>Information needs to be manually updated</p> <p>Information will require regular staff commitment to keep up to date</p> <p>For active accounts, there will be a significant cost in staff time</p>
<p><b>Screenshots</b></p>	<p>Records can be kept</p> <p>Information can be kept in accessible formats</p> <p>Images provide an exact representation of the content as it appeared in the social media application</p>	<p>Information needs to be manually updated</p> <p>Information will require regular staff commitment to keep up to date</p> <p>Information is flat and not dynamically available to reuse or repurpose</p> <p>For active accounts, there will be a significant cost in staff time</p>
<p><b>Reports of pre-scheduled posts</b></p>	<p>Record is compiled as part of process of developing and authorising social media posts</p>	<p>Information is not an exact representation of what was posted on social media sites but is an approved records of what was authorised to post</p>

**Case study: Records staff can deploy social media monitoring tools**

Rather than rely on business areas to make and keep records of their social media activities, records staff can deploy social media dashboards and monitoring tools to monitor all internal social media accounts and to export the information from these accounts as required.

### **Services in this area are very subject to change**

It is very important that you keep an eye on any recordkeeping solutions you implement for your social media. Many of the free online services that are available offer very good and useful functionality but these technologies are evolving rapidly.

A solution that suits you today may evolve into something different tomorrow or a solution that exists today may disappear tomorrow.

Many free services are experimenting with formats, functionalities and services and the capacities they offer may change quite regularly.

All the free services are ultimately actually commercial operations and so the services they offer will be driven by business imperatives. For instance, [Backupify announced in December](#) that they will no longer be providing backups of LinkedIn data. Increasingly their corporate revenue is coming through backup for enterprise-based SaaS applications. They are therefore focussing less of their resources on consumer back up requirements and more on corporate requirements.

Therefore be very aware of change and vulnerabilities in this space and monitor whatever services you deploy to ensure they continue to meet your business needs.

### **Use recordkeeping channels that you already have**

One organisation, when seeking community consultation via social media, directed people back to its organisational blog to provide feedback. The blog was set up with an RSS feed so that any comments received on it were emailed automatically to relevant staff. Staff were able to capture these emails into their corporate records system, based on existing processes and procedures.

### **Use management reports for recordkeeping purposes**

Social media is still a relatively new technology in many government organisations. Management in some organisations is still yet to be convinced of the validity of social media as a business tool and, while its business relevance is being evaluated, many organisations have strong reporting requirements around social media.

If your organisation is unwilling to commit to third-party tools or other investments to support the management of social media information, business reporting can be captured and used as a means of making and keeping records of your social media operations.

**For example:** Many organisations still plan their tweets and send their proposals through for official endorsement. These records could be captured as official records of your social media activity, rather than the tweets themselves.

### **Use recordkeeping strategies to bring social media information together**

You want to avoid your individual social media channels becoming separate silos of corporate information.

Thinking strategically about business and determining how specific business processes could benefit from the information generated by your social media channels can help to determine what information from your social media applications you should capture and share.

Third-party applications can help to automate this process.

**Example: Social media dashboards**

Dashboards such as HootSuite offer the ability to bring together content from your variety of social media channels to build an overview of your social media presence. These tools can sometimes export consolidated social media data and this record can then be used as business intelligence in your organisation, as well as a formal record of your social media presence.

**Use social media recordkeeping as an opportunity to improve your business intelligence**

You can use social media as an opportunity to know so much about your clients and your operations.

If you use monitoring or reporting tools to track or measure your social media operations, ensure that the tools you use can export copies of these assessments or reports.

These records can be captured and used across your organisation to feed into business intelligence, planning, service improvement etc.

You can use this reporting to:

- Measure the impact of the content you are sharing
- Identify topics of interest and relevance to your community
- Improve your services

**Case study: [Vizie social media monitoring tool](#)**

The CSIRO is developing social media monitoring software called Vizie. Based on the CSIRO's research in text analysis, the software monitors and evaluates tweets, blogs and posts to determine hot topics, issues that relate to organisational operations and business matters discussed in social media channels that may to be addressed. It also generates and exports information reports. CSIRO is looking for government bodies [who are interested in trialling their Vizie software](#).

**Specific information management issues relating to Twitter**

**Australian government Twitter statistics:**

- By 25 January 2013, government agencies across Australia had tweeted a total of 1,021,046 times
- There were 852 active social media accounts across Australian government.
- These accounts were followed by 1,794,257 followers.
- NSW government had 174 Twitter accounts with 288,077 tweets and 394,279 followers.

Source: <http://egovau.blogspot.com.au/2013/02/infographic-top-government-twitter.html>



### **Make use of Twitter hash tags**

One way to gather together tweets on a specific issue or service is to search on a specific hash tag.

Hash tags are a means of labelling and classifying tweets. Specific events such as a conference will have a hash tag (for example #ICA\_2012), concepts can have a hash tag (#archives), or specific organisations or services can have a hash tag (#staterecords).

Searching for a specific tag will bring together all tweets that contain the hash tag which you can then copy and export.

### **Be alert to information loss that can be caused by short URLs**

Many tweets contain links to longer forms of information and, because tweets must be 140 characters or less, many of these links take the form of short URLs.

**Example:** [bit.ly/UpZXrR](http://bit.ly/UpZXrR) is the short URL for <http://futureproof.records.nsw.gov.au/what-recordkeeping-functionality-do-business-systems-need-to-provide/>

Short URLs are likely to be less supported and accessible than regular URLs. They are designed as a short term service and no guarantees are provided about their longevity.

In addition, as you can see from the example above, a regular URL generally provides information about the location and context of an online resource whereas an auto-generated short URL does not.

In a social media recordkeeping strategy you may want to look at the short URLs contained in your organisational tweets or other social media sources. You should ask questions like:

- In a year's time, is it going to be important to know what this information referred to actually was?
- Will we need to know what webpage a client was pointing to in their comment?

In many instances it may not be significant but, if in particular business areas it is going to be important to know what was being referred to, you should develop a means to capture a record of the referenced web page where necessary.

This capture could be a manual process to capture either the full URL or a screenshot of the page itself. Alternatively it may be possible to develop an automated process and deploy a tool that will automatically take a copy of the web pages referred to in your tweets.

Depending on their business purpose, some Twitter accounts will reference external links much more significantly than others. For example, a Twitter account used for marketing or communications will generally point off to a lot of other web-based resources, while another that is used to facilitate discussion and debate will not reference as many external resources.

### **Consider the use of different Twitter accounts for different business purposes**

If it is likely that you will have a broad range of tweets and retweets in your account, ranging from business critical commentary through to tweets about new library acquisitions, you may want to create several Twitter accounts, rather than funnel all corporate business through one account.

If you have one account and some business critical information passes through it, if you use certain recordkeeping strategies such as running a report through a third party service, it will provide you with a record of all tweets in your account, not just the key tweets.

If you only want to capture key tweets, you can set up RSS feeds to provide you with copies of all your tweets, retweets etc and then you can capture the key tweets as emails and leave the others in Twitter.

Creating several accounts gives you more options for information management. For example, you might want to create a @CouncilXyoursay account where you encourage ratepayers to comment on current issues and a @CouncilXlibrary account for news and updates about the library. You could deploy different information management strategies for the different accounts, based on the levels of business risk you identify.

### **Specific information management issues relating to wikis**

With these types of complex systems you need to ask fairly complex questions to try and determine exactly what parts of the system you need to keep as a record.

Questions to ask to help you define what records need to be captured and kept are:

- What information do we want and need to keep?
- Can we prioritise by risk and focus on extracting and maintaining critical data?
- What metadata is necessary to document context and for audit and management purposes?
- How long do the records need to be kept for?
- Do we need to keep change history and revisions?
- Do we preserve at intervals or at a particular project completion date?
- Do we preserve text content, or complete functionality, or the look and feel of the site?
- How do we capture records? What formats can or should be used for export and for ongoing storage?

### **Specific information management issues relating to collaborative editing tools**

With collaborative editing tools like Google Docs, it is critical to consider the strategic management requirements that apply to this type of collaborative documentation that may be shared across organisations.

You need to develop rules or requirements such as:

- what technical and administrative controls are required, such as secure log in
- what version controls are required
- what revision history needs to be documented
- is there the capacity to lock down pages
- what back up services need to be implemented
- how will the capture of necessary metadata be arranged
- how is ownership between multiple collaborators to be determined
- how will access arrangements between multiple collaborators be determined?
- when export will be performed – regularly or at project completion etc

## **Section 4: Strategies for managing social media information: Some retention and destruction issues**

A key way of knowing what information management strategy you should deploy for your social media is by identifying the legal requirements that outline how long your specific social media records need to be kept.

If your information only needs to be kept for short periods of time, your information management requirements will be quite minimal. If however your information needs to be kept for long periods of time, you will need to seriously consider the social media information strategy you will deploy to keep and preserve your information.

State Records is in the process of expanding its advice on social media retention rules, but in the interim, here is some initial advice on how long you need to keep different types of social media records for.

### **How are decisions about retention and destruction of social media records made in NSW?**

In NSW the retention and destruction of all government business information is governed by the State Records Act.

Tools called retention and disposal authorities, issued under the State Records Act are developed based on an assessment of legal, business and community requirements for government information. Bearing legal, business and community requirements in mind, these tools specify the minimum periods that all classes of government business information need to be kept.

These tools apply to social media records across government. State Records will shortly issue further advice and case studies on how retention and disposal rules apply to social media, but in the interim, here is some advice in response to frequently asked retention and destruction questions.

### **What is the minimum amount of time I should keep an organisational blog for?**

If the blog is very minor and the consensus is that its contents are not significant, 2 years is the minimum period of time that you would legally need to keep it for.

### **Can I keep the blog for longer than what you say?**

Certainly. State Records' retention rules are a minimum requirement only.

If however you believe the content is significant, that is if it contains important statements on corporate operations, policy announcements or significant public statements, you could classify this blog as a State archive and keep it forever.

State Records' general advice is that organisations should carry out a risk assessment to ascertain if these minimum retention periods are appropriate. You can decide to keep any of your records for longer than our recommended minimum retention periods. For example, you may decide to retain all records of the blog for statute of limitations purposes (7 years) or you may decide to retain them on a permanent basis.

<b>Case study: How long do I need to keep my Council Facebook page for?</b>
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As with all other social media information, it does not matter whether the information is a
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tweet, a Facebook status update, or a paper letter. What counts when you are deciding how long you need to keep your information for is the type of business that the information documents. If it is low risk business, then the information can be kept for relatively short periods of time. If the business is high risk, the information should be kept for longer periods of time.

Here are some different retention rules that relate to some of the Council-based business operations that are moving to social media environments:

- posts promoting the library's holiday programs: 5 year retention period (as required by GA39, 3.8.3)
- posts about a bushfire emergency: 7 or 25 year retention, depending on the severity of the emergency (as required by GA39, 9.12.2 or 9.12.3)
- public comments on Council's revised Land and Environment Plan: 10 year retention period (as required by GA39, 18.3.2)

### **Do I need to make an official record of rude or obscene posts or information received via social media or can I just destroy them?**

No you don't need to capture these formally into your recordkeeping system. These can be deleted from your social media accounts without the need for any formal recordkeeping.

If multiple obscene posts are received from the same person, however, and the situation escalates to become a police matter, you may want to keep samples of some of the posts, or summary information about the posts, such as when they were received and the user name of the account that generated them.

### **Look at what other government organisations are doing**

The Department of Education and Communities (DEC) has a very useful [Decision tree for handling negative social media comments](#) on the Social media section of its website.

### **Am I destroying records without authorisation if I remove particularly negative comments from Facebook or our corporate blog?**

No. Laurel Papworth, [CEO of the Community Crew says](#):

'It's actually your duty to remove really bad comments and commenters. Freedom of speech belongs on their own page, not yours! We are also judged by the company we keep – "social" media does not have to mean "friends to all". Feel free to filter out – block or ban – those who do not share the value systems of the community.'

Your social media sites should be supported by a policy statement, often called Rules of Engagement in social media settings, that informs users that their posts or comments could be removed if they are seen as offensive or damaging, and that people can be banned from your blog or Facebook page for repeated offensive behaviour.

### **Can I remove negative comments about our organisation from our Facebook page or blog?**

One of the key business benefits of engaging in social media is receiving full and frank feedback on your programs and services. Legitimate comments of this type can help to improve services and remedy problems. Open discussion on your social media sites can also inspire as many compliments as criticisms.

Negative feedback should therefore not be removed. Where it is valid and useful, you should capture it as a record and feed this information into business or services improvement strategies or processes. To capture these specific instances as a record, you could take a screenshot, run a report from whatever form of monitoring tool you use, or simply summarise the feedback in an email, citing where the feedback came from.

### **Can I remove inaccurate statements from our Facebook page or blog?**

If you consider these statements damaging then yes, you are able to remove them. It may be more appropriate, however, to engage with users and issue statements that provide users with the correct information.

Some organisations choose to make a formal record of all posts or comments that they remove from their social media sites and these posts or comments, along with a justification for their removal are captured as official records into corporate recordkeeping systems.

Each organisation should make a risk-based assessment to determine whether inappropriate posts can just be deleted in accordance with stated policy or whether the nature of the post or the nature of the business area affected justifies the creation and capture of a formal business record.

### **Can I block certain users from our social media channels?**

Craig Thomler, Managing Director of DeLib Australia posted this advice about managing inappropriate social media uses and content on his eGov AU site:

I have banned people from access where they were abusive, defamatory, threatening, encouraged violence or law breaking, were highly inappropriate, or where they repeatedly veered off-topic or became political in discussions where the terms of use and community guidelines made it clear that such conduct was unacceptable.

I'd always keep a copy of the term-breaking content as a record and, wherever possible with the social media tool, make it publicly clear why the deletion or ban occurred. When others I worked with managed social media channels, I advised similar scrutiny and approach.

Source: [Should government agencies and councils be entitled to ban people from their social media channels](#), 6 February 2013

Social media is however a community forum and all types of positive and negative feedback should be expected through social media engagement.

Users should only be blocked for obvious infringements of your stated acceptable use policies and, as Craig Thomler mentions above, the justifications for this should be documented.

### **What happens when I decommission a social media handle or account?**

You should consider whether you need to export information out of the social media application and into corporate systems.

- Was this account significant?
- Is business information of ongoing business value maintained here?
- Will members of the public who provided information here expect that the information they provided will continue to be available in coming years?
- Is the business information in the application going to be needed for reporting, assessment or business improvement purposes?

You should inform your users that you are closing down your site. Because social media involves sharing of information, there may be others affected by your business decision. Laurel Papworth, [CEO of the Community Crew](#) recommends asking questions like:

- Have you told your community that you are decommissioning your site?
- Have you provided them with the opportunity to export any content, including photos or videos, that they may have shared with you?
- Have you informed your community about new social spaces you are moving to?

## **Section 5: Strategies for managing social media information – Frequently asked questions**

Here are a whole host of questions we have received about managing social media information.

We will continue to add to this list of FAQs as people ask us more interesting social media questions.

1. How do I determine what records from my organisation's social media activities need to be retained?
2. My IT manager says social media applications are not official business systems and therefore we don't need to keep records of corporate social media activities. What should I say to her?
3. Do I really have to make official records to document what my organisation is doing on Facebook? If so, how do I do it?
4. Can I keep social media records in the business system that generates them?
5. Do I need to know the time and date that I broadcast a particular social media message and know when someone receives it?
6. With my social media records, do I need to keep them in their original format and make sure they look just like they did in their original social media environment?
7. Is Facebook a government business system? My IT section says that it is not.

### **1. How do I determine what records from my organisation's social media activities need to be retained?**

If your organisation is:

- pushing business information through social media channels
- receiving business-related communications through social media
- building an official business presence in any social media system

then it has legal (including under the State Records Act NSW) and business requirements to be able to account for the business it is transacting via social media.

Organisations use social media in a variety of different ways and for various different types of business operations. What information needs to be captured and maintained will depend on the business processes or operations being carried out via the social media application.

As social media is a relatively new and a rapidly evolving technology, there are no defined, best practice ways for making and keeping social media records. You will need to choose strategies that best meet your business needs and technological environment, based on a full assessment of potential business risks and information requirements.

## **2. My IT manager says social media applications are not official business systems and therefore we don't need to keep records of corporate social media activities. What should I say to her?**

Your IT manager may be focussed on the blurry line between some of the more informal communications on your social media channels and the more substantial business that may be occurring there.

This however should not distract from the fact that organisational decisions and programs may be being publicly questioned on your social media accounts, that your organisation may be publicly promoting its programs and operations on social media and that you may be using social media for other legitimate business purposes, such as public consultation on policy or regulatory proposals.

If you are using social media for business purposes then the information being made available or the information received via social media is official government business information and you do need to assess whether you need a social media recordkeeping strategy.

A social media recordkeeping strategy will enable you to:

- account for your business operations that are moving to social media environments
- assist clients who choose to engage with the organisation through social media
- ensure that the business intelligence generated in social media is fed back into business operations and is maintained and accessible for business purposes for as long as it is required
- determine what business records in your social media channels need to be exported out of their native environment and into corporate recordkeeping or business systems
- evaluate, monitor, improve and assess your social media strategies and the business processes you are moving to social environments.

The very public nature of social media-based operations brings with it a public expectation of openness and accountability. If government is engaging in social spaces, people expect that fit and proper processes will apply to the social media communications as much as they apply to traditional, more formal communications. Good recordkeeping of your social media operations is a key way to meet this expectation.

## **3. Do I really have to make official records to document what my organisation is doing on Facebook? If so, how do I do it?**

The business conducted via social media is official government business. Your organisation does need to know the advice, decisions and commitments that are being made via social media and making official records is the way to do this.

That said, all business is not created equal and there is no over-arching requirement to keep absolutely all records of business in your organisation. You should make and keep records based on an assessment of your business needs and risks. Decisions about whether to make and keep records should be based on questions like:

Will I need this information:

- for reporting?
- as the basis for subsequent actions?



- to incorporate user-generated content into business products or processes?
- for responding to future enquiries?
- to feed business intelligence back into the organisation?
- for legal requirements?
- for ongoing client management?
- for planning?
- to monitor or improve business process?
- to measure the impact of your social media strategies?

You also don't have to necessarily officially capture all comments, posts, updates etc. You can choose to capture only the content that has ongoing business requirements or relevance.

When making these decisions about what records to officially capture, you also need to bear in mind that social media systems are generally third party owned and located in the cloud. There are no guarantees that social media systems will keep your information or make it accessible for any significant periods of time. Therefore if there are business needs to keep records of your social media operations, you do need to proactively plan for the export of relevant information out of your social media system.

Ways you can make records of your Facebook activity include:

- regularly export your Facebook generated Activity Log from the Facebook administrators page – this will provide a copy of all posts, comments etc on your Facebook page
- using a third party service such as Social Safe to regularly export a version of your Facebook content
- if only a small proportion of your Facebook content needs to be officially captured, using RSS feeds of updated content, screenshots, reporting or other mechanisms to capture this content.

See also [Strategies for managing social media information: How do I capture social media records](#)

#### **4. Can I keep social media records in the business system that generates them?**

Our unofficial surveys across government show that organisations are using lots of different systems to drive their social media operations. Some are using channels such as Twitter and Facebook directly, while others have off-the-shelf or purpose-built business systems that are used to generate content and then automatically broadcast this through various social media channels.

Irrespective of what system you use, can you keep your social media records in this system?

As we say all the time, recordkeeping is a risk-based decision. You will need to consider your own specific business context, business risks and information needs but, in general, our standard advice would be:

*For third-party, cloud-based systems like Twitter, Facebook, You Tube, LinkedIn etc:*

- low risk business operations, low value business information – you can leave this information in your social media system and rely on the system to provide ongoing access for the short period of time that you may need business access to

this information

- higher risk business operations, higher value business information including decisions, advice, public input, feedback etc that are required for ongoing business operations – export this information out of the social media system because there are no guarantees that the system will provide ongoing information support or accessibility.

For business systems that have the capacity to broadcast through multiple channels:

- information will generally be secure in these systems for the length of the system lifespan, but if the system is upgraded, replaced or decommissioned, you will need to determine if any information in the system needs to be kept for ongoing business or legal purposes.
- it may be easier to regularly export high value information out the system throughout its active life and store this in a central records system, rather than determine at system decommission what information requires export for ongoing support and management.

It is important to note that some social media communications, like emergency broadcasts, can have very long legal retention periods, up to 25 years in some cases. An important part of social media recordkeeping strategies therefore is, when business moves to social media platforms, to determine what you need to do in order to keep the records generated in your social media systems for your required retention periods.

### **5. Do I need to know the time and date that I broadcast a particular social media message and know when someone received it?**

Yes, irrespective of how you decide to keep your key social media communications, a core piece of information you will need to have in any system or environment you use is a fixed record of the date and time that your social media communication was issued.

You do not need to capture information about when someone receives your communication as often this is not possible to do. Geographical coverage issues, volume capacities, specific device issues and device availability can all affect transmission time and potential. You cannot know or mitigate these issues but you can keep a record of when your advice was officially broadcast. Therefore any recordkeeping strategy must ensure that the date and time of your transmission is able to be captured and kept.

If you are using a business system to generate and broadcast social media communications across a variety of channels, for certain high risk transactions you may also want to ensure that your system can generate an exception report, to ensure you are informed if some posts are not successful.

### **6. With my social media records, do I need to keep them in their original format and make sure they look just like they did in their original social media environment?**

With your recordkeeping, what you ultimately want is business information that is accountable, accessible and useable. Capturing records so that they look exactly as they did in the original social media environment may be desirable, but ultimately it is not as important as information accountability, useability and accessibility and process achievability and sustainability.

A number of social media formats are actually very complex, like Facebook's AJAX format. These formats are great for immediate, dynamic, complex visual presentations of diverse forms of data, but in the long term you don't want to capture records in this format and create complex, long term, legacy format management problems in your organisation.

For Facebook, rather than exporting records in AJAX, you could capture your original content, be it a post or video or image in its original format, or capture the information via RSS feed, screenshot or export using a third party service such as Social Safe etc. You can also capture user feedback in the same way. These can be captured as official records in your records system.

If you feel that capturing a visual representation of how your social media sites looked at a particular point in time, or how particular posts, images and videos looked together on a site is important, you can take a screenshot of the site and capture this too as part of your official records.

With digital business information, when it gets down to it, what matters isn't the format, it's the information contained in the format. So if original format preservation isn't appropriate or cost effective or sustainable, it is legitimate to look at other options that are appropriate, cost effective and sustainable, and that provide you with the evidence and information you require.

## **7. Is Facebook a government business system? My IT section says that it is not.**

Yes! If you are using it for government business purposes, then it is a government business system and you need to make arrangements to manage the information you are producing and receiving.

Facebook however is not a recordkeeping system – it is owned by an external third party and it is located in the cloud. If you need the business information in Facebook to account for your actions, to incorporate in business processes, to track decisions you have made, to provide input into policy development etc etc, then you need to actively export this information out of Facebook because there are no guarantees that it is going to stay accessible in your Facebook account for as long as you are going to need it.

This however does need to be a risk-based decision. For example, if a Facebook account is just used by a library to promote new acquisitions and (for example) library promotional material only needs to be kept for business and legal purposes for 2 years, then you may decide that leaving it on Facebook is an OK recordkeeping strategy. If however officers are providing development advice on Facebook or answering questions about high level business plans, then this is more contentious and trusting Facebook to keep this information for the much longer retention periods that apply to this type of information is not appropriate.

The standard process at this stage for recordkeeping in Facebook and other social media environments is to do a regular export of your data from these systems.

IT staff do need to understand that Facebook is a business system and that genuine and risky government business is already taking place here. So the export you do and the information you need to capture from Facebook needs to be an accurate representation of the business that is being performed. You need date and time representation of transactions, of comments, of posts, possibly of likes. It is important to sit down with business and determine exactly what they are going to need to account for the actions and transactions that are starting to take place in Facebook. And the business moving to social media and mobile environments is only going to increase, and so it's important to put in place strategies now that are going to enable you to have good and meaningful information both now and in the future.