Social Media in Government

High-level Guidance

Contents

1. Executive summary

Given the significant uptake of social media tools by New Zealanders, we have reached the point where social media needs to be considered when developing any modern, professional communications strategy.

Social media is a set of online technologies, sites and practices which are used to share opinions, experiences and perspectives. Fundamentally it is about conversation. In contrast with traditional media, the nature of social media is to be highly interactive.

Purpose and scope

This document has been written to help government agencies when they are trying to decide if they should use social media in a communications, community engagement or policy consultation context. It is intended to be useful to managers and leadership teams, but also provides basic principles, addresses code of conduct and legal issues, and contains templates that are important for practitioners of social media.

As with any communications channel, social media projects require proper planning, benefit and risk assessment, resourcing and commitment.

This document takes you through the issues that need to be considered before your agency begins using social media. It offers information to help with benefit and risk assessment and, finally, a business case template designed to stimulate thinking around some of the key areas that need to be considered when planning to use social media.

Companion document

A companion document, entitled 'Social Media in Government: Hands-on Toolbox', has been written to help practitioners who are setting up social media profiles and using the tools on a daily basis. It has been written for public servants with limited experience using social media, but also offers tools and tips that will be useful for those practitioners who have been using social media for some time.

The 'Hands-on Toolbox' document:

- gives an overview of the strengths and weaknesses of the five core social media tools: social networks, media-sharing networks, blogs, wikis and forums
- provides tips and templates for reporting, participation and moderation policies, accessibility issues and legal considerations
- provides useful examples of how social media is being used effectively by government agencies
- does not offer advice on specific social media applications (for example, it does not specify the specific steps necessary to set up a Facebook page or a forum on Bang the Table)
- is not meant to be read from start to finish, but rather to be used as a reference when facing specific issues or using specific tools.

Together, these two 'Social Media in Government' documents will help those willing to engage with social media to take positive action from which they and their organisations can benefit.

2. About Social media

Changing media landscape

'Social media' is consuming increasing amounts of New Zealanders' time and attention.[1] Just as television did not replace but supplemented the media channels that existed before its arrival, 'social media' is now another valid and legitimate media channel. This new channel can be used as a lead medium or in a supporting role to traditional media, depending on objectives and intended audience.

Public servants need to understand social media and take action in order to ensure government agencies are operating effectively in what is becoming a very dynamic, and at times challenging, media environment.

We have reached the point where social media needs to be considered alongside all of the other appropriate channels when developing any modern, professional communications strategy.

What is social media?

'Social media is a set of online technologies, sites and practices which are used to share opinions, experiences and perspectives. Fundamentally it is about conversation.

Social media is different from traditional media -- such as print, TV and radio – as it is not a broadcast medium.

Social media is a dialogue that happens between Government and its citizens. This means that the level of control assumed from traditional media is replaced with a deeper level of engagement with the public. The main benefit of social media for governments is that well-considered and carefully implemented social media can create greater transparency, an interactive relationship with the public, a stronger sense of ownership of government policy and services, and thus a greater public trust in government.

The potential uses of social media are wide and varied. Government can use social media to raise awareness of certain issues, build credibility with specific audience groups, engage New Zealanders on policy consultation, or as an internal communications tool to improve collaboration between government agencies or within a single agency.

The following guidelines are intended to help agencies decide if they should use social media.

While this guidance is based around best practice at the time of writing, when using this material you and your agency should be guided first and foremost by common sense and the 'Basic principles' on page 8 for participation.

---

[1] Nielsen: 1.8 Million New Zealanders Interacting via Social Networking Sites http://www.nielsen-online.com/pr/social_media_report.pdf

3. Social media in New Zealand

New Zealanders have been early and enthusiastic adopters of social media. New Zealanders have already begun forming opinions and making decisions based on the information they receive through social media.

Consider the following statistics about internet use in New Zealand, from a July 2010 Nielsen study:[2]

- 1.8 million New Zealanders are interacting via social networking sites.

- 82% of New Zealand internet users have visited Facebook.

- 70% of New Zealand internet users have a Facebook profile.

- 79% of social networkers name Facebook as their main social networking platform (up from just 19% in 2007).

- Of those who say Facebook is their main social networking platform, 54% visit the site at least daily.

- The biggest increases in social media usage are in reading wikis (up 26%), updating and creating social networking profiles (up 17% & 16% respectively) and looking at others' social networking profiles (up 16%).

- More than one quarter of New Zealanders (27%) have visited Twitter, and 11% have created Twitter profiles.

- 44% of New Zealand Twitter users have 'followed' companies or brands via Twitter.

- More than two in five New Zealanders (42%) are interacting with companies via social networking sites.

- 44% have published opinions about products, services and brands.

- 73% have read other consumers' product opinions online.

- Of those who haven't read consumer reviews and discussions online, almost two thirds intend to begin doing so.

- Nearly 2 million online New Zealanders have looked to their fellow internet users for opinions and information about products, services and brands.

According to Alexa[3], the top social media websites in New Zealand are:

1. Facebook
2. YouTube
3. Wikipedia
4. Blogger.com
5. Twitter
6. LinkedIn
7. WordPress.com
8. Flickr

---

2 The Nielsen Company www.nielsen-online.com//intl.jsp?country=nz

3 Based on Alexa traffic rank for July 2011 (http://www.alexa.com/topsites/countries;0/NZ). Note that Blogger and WordPress are platforms for social media, not social networking sites.

4. Before you start

Would your agency pay for a radio advertisement without thinking about what the goal of the advertisement was? Would you commit to writing a monthly newsletter without determining your audience, key messages, and a list of possible topics? Of course not.

Radio and newsletters are channels for communication, just as social media is. Before embarking on a social media project you need to consider things such as:

- your goals and objectives
- your target audience(s)
- the benefits, risks and mitigations for those risks
- the ongoing resources required
- your measure for success.

Of course, if you are targeting pensioners on a fixed income, you are less likely to have an effect with social networking than if you are targeting teens. Social networking may be fashionable but it is not the best communications channel in every instance or for every audience.

Resourcing

Resource planning for social media is especially important. Blogs that haven't been updated in months can make your agency look incompetent and disorganised. The same can be said of Facebook and Twitter accounts that don't get updated.

Social networking is not a 'quick win'. It takes time to build a community. You're in for the long haul, and resource commitments need to reflect this.

Forums that debate specific policies, however, may be time-specific. Resource planning should take that into account.

When calculating resources, be sure to consider the need to publicise your social media investment. Promotion work can be done by adding links from your corporate website, doing marketing campaigns, or simply leaving comments in forums and blogs with links back to your social media profile. However you decide to publicise, there will be resource implications.

Resources may also be needed to create back-ups, transcripts, and other records of social media activity

Learning the ropes

One of the best ways for staff to learn how to use social media is to start off using it themselves. Setting up their own personal Facebook or Twitter profile or starting up a personal blog in their own time will help them to learn the ropes with minimal risks, and without the added weight that comes with representing the agency in a professional manner. Once staff have 'learned the ropes' they will be better prepared to start using social media professionally.

Staff should only engage in social media on behalf of the agency if they have received the authority and, where necessary, training to do so. See 'Codes of Conduct and online participation' on page 8.

Trusting staff

Social media tools require quick responses and direct communication with stakeholders, often in real or near-real time. Successful social media projects are ones where delegated staff are trusted, after proper training, to understand and manage the risks around release of information. If information needs further

verification or is potentially contentious, staff need to be trusted to escalate as appropriate – and those escalation paths must be quick and efficient.

Nothing kills the effectiveness of a social media project more quickly than slow response times where each and every statement or 'tweet' needs to go up the chain of command to be approved before publication.

Passive, active, engaged

There is a spectrum of involvement in social media. Your organisation doesn't have to jump in boots and all on the first day. You can start with a passive involvement and move through to becoming more active and finally fully engaged with the audiences you have identified.

Passive

One of the first things your organisation can do in social media is simply to listen. What's being said about you?

Social media monitoring tools can help you discover what's being said about your organisation. You can, for example, do a twitter search for relevant terms (your organisation name, or the name of a specific issue relevant to your organisation). There are also services which can send you alert emails every time a certain term is mentioned in blogs and other social media tools. One example of such a service is Social Mention (http://www.socialmention.com/). Other examples include Trackur, Klout, and NetVibes.

At a minimum, government communicators should find and assess the social media tools that their target audiences are using. This landscaping can then be used to inform strategic plans, future communications, or budgets for greater participation in social media, if necessary.

Active

Once you've listened for a while and understand the tone and concerns of a social media community, you can begin becoming more active. You can post links to information to help people answer questions they have, or you can actively correct an inaccuracy on a blog, forum or a wiki.

This sort of activity can be done in 'other people's houses' – that is, in the blogs, forums and wikis that others have established. Make sure you follow the 'Basic principles' (see page 8) and always identify yourself as a public servant if you are responding on behalf of your organisation.

Engaged

Finally, your organisation can become fully engaged. You can set up a group on a social networking site and regularly introduce content for discussion, or you can establish a Twitter profile and begin contributing and actively posting and answering questions.

Be aware that once you've become fully engaged, you have a responsibility to be a good custodian. You'll need to post regularly, moderate comments as appropriate, and check regularly for messages that require a response.

There are more examples of the 'Passive, active, engaged' spectrum in the 'Benefit, risk and mitigation tables' on page 12.

5. Basic principles for staff

There are some common principles shared across all forms of social media. Knowing these basic 'rules of engagement' will serve staff well whether they are simply contributing to or actually managing an online community.

- **Be credible** - Be accurate, fair, thorough and transparent.

- **Be consistent** - Encourage constructive criticism and deliberation. Be cordial, honest and professional at all times.

- **Be responsive** - Answer questions in a timely manner. Share your insights where appropriate.

- **Be integrated** - Wherever possible, align online participation with other offline communications.

- **Be a public servant** - Remember that you are an ambassador for your agency. Wherever possible, disclose your position as a representative of your department or agency.

- **Be a good custodian** – If you've introduced and/or are managing your organisation's social media profile or blog, make sure that you're posting content and checking messages regularly. An untended and out-of-date account looks unprofessional. Also ensure that information is created, kept and, if necessary, disposed of in accordance with organisational policies.

Codes of Conduct and online participation

Both the Code of Conduct for the State Services (www.ssc.govt.nz/code) and the Code of Conduct for your individual agency apply to staff participation online as a public servant. Staff should participate in the same way as they would with other media or public forums such as speaking at conferences.

- Seek authorisation to participate in social media on behalf of your agency. Do not disclose information, make commitments or engage in activities on behalf of government unless you are authorised to do so.

- If you are participating in social media on behalf of your agency, disclose your position as a representative of your agency unless there are exceptional circumstances, such as a potential threat to personal security. Never give out personal details like home address and phone numbers.

- Always remember that participation online results in your comments being permanently available and open to being republished in other media.

- Stay within the legal framework and be aware that defamation, copyright and privacy laws, among others, apply (see Section 6 - Legal considerations).

- If you're using social media in a personal capacity, you should not identify your employer when doing so would bring your employer into disrepute

- Keep in mind that even social media sites restricted to your 'friends' are in effect public, as you cannot control what friends do with the information.

- Always make sure that you are clear as to whether you are participating in an official or a personal capacity. Be aware that participating online may attract media interest in you as an individual, so proceed with care regardless of what capacity you are acting in.

If you have any doubts, take advice from your manager or legal team.

Special advice to Chief Executives

As social media use increases, many Chief Executives are considering whether or not to participate in social media in a professional capacity themselves – for example, using Twitter or Facebook under their own name and as a representative of their organisation.

When undertaking any new communications strategy, all channels should be considered, and if social media is deemed appropriate, Chief Executives need to consider the risks, benefits, goals, and audiences before directly participating. A Chief Executive's presence on social media should be considered part of the larger communications strategy.

While social media has benefits, it needs to be actively managed if the benefits are to be realised and the risks minimised. One of the most serious drawbacks for Chief Executives is the amount of time social media takes up and the risk that, if they are not familiar with social media, Chief Executives might come across as too formal and, therefore, 'inauthentic'. Consideration should be given to resourcing or delegating to a social media expert within the organisation.

As with any media tool, Chief Executives should ensure they are adequately trained in using social media before they begin participating. It is a public forum, and should be considered as such at all times. Content posted in error in social media often cannot be withdrawn and may damage the organisation's reputation, as well as the professional reputation of the Chief Executive.

6. Legal considerations

A number of legal issues can arise in the context of an agency's deployment of social media. Most legal issues are avoided by exercising common sense and observing existing codes of conduct. At the same time, it is important to understand the legal parameters within which an agency is operating, particularly when the rapid pace of development and some of the unique dynamics of social media may give rise to unfamiliar or ambiguous legal issues.

Section 7 of the Hands-on Toolbox provides an introduction to the more common issues that may arise in the context of an agency's use of social media and should be consulted when deploying social media sites or tools. It addresses:

- the inclusion of appropriate terms of use
- copyright issues and potential application of the New Zealand Government Open Access and Licensing framework (NZGOAL)
- privacy issues
- the need for care around party political comment
- staff contributions and the potential need for staff contribution guidelines
- security of people
- defamation and other objectionable content
- linking
- conflicts of interest
- confidentiality
- Public Records Act 2005 and Official Information Act 1982 compliance
- the Public Finance Act 1989 and indemnities in the terms of use of third party social media tools
- the need to comply with procurement rules when they apply
- authentication issues
- issues that may arise under the Guidelines for the Treatment of Intellectual Property Rights in ICT Contracts
- the need for care when using social media as a channel for legally required consultation processes
- the need for care, in Fair Trading Act 1986 terms, when using social media as a channel for commercial activity
- data sovereignty (or control).

7. Benefit and risk analysis

As with any communications channel, there are benefits and risks to using social media. Before your organisation actually starts using the tools, it is important to assess these benefits and risks adequately.

Benefits

Social media can bring a variety of benefits in supporting your agency's communications and wider objectives, including:

- Increase audience reach and improve the accessibility of government communication
- Reflect the communication channel preferences of many New Zealanders
- Meet public expectations of modern service organisations and enhance reputation
- Promote transparency in government
- Support more involved relationships with citizens, partners and other stakeholders
- Enhance our ability to quickly adjust or refocus communications
- Improve the long-term cost-effectiveness of communication
- Benefit from the credibility of non-government channels
- Increase the speed of public feedback and input
- Reach specific audiences on specific issues
- Reduce dependence on media and counter inaccurate press coverage
- Lead New Zealanders directly to online transactional services.

Risks

Because social media is an evolving area of government engagement, there are risks. These can be cultural, technical or reputational and must be factored into planning. But they should not dissuade you from using social media. Over time, as experience builds and case studies provide us with precedents, risks will be more easily identified and reduced.

Risks in using social media include:

- Government activity in some social media websites and forums may not be welcome
- A post by government employees may be inaccurate or inappropriate, creating legal or reputational risk
- Some sites may be open to manipulation by interest groups or those with malicious intent
- User generated content may be difficult to check for accuracy
- Negative impact on a community when a public figure has to pull out of a debate
- Greater resource requirements than expected
- Comments may unintentionally inflame a situation
- Without appropriate planning, you may not be able to meet information management obligations under the Public Records Act 2005, Official Information Act 1982 or Privacy Act 1993.

There are appropriate mitigations for these risks. For a closer look at specific benefits, risks, and mitigations, see the 'Benefit, risk and mitigation tables' on the following pages.

Benefit, risk and mitigation tables

Passive	→	Active	→	Engaged
Monitor	Signpost or support	Respond	Discuss	Debate

Monitor

Potential activity	Potential objectives	Benefits	Risks	Risk mitigation	Example
Monitor social networking sites, forums and blogs for discussion on the agency, its proposals or services delivered	• Understand how opinion is forming • Identify gaps in service delivery • Identify service users'/audience's information needs • Understand how stakeholders are related	• Situational awareness • Increase understanding of nature and range of commentary	• Monitoring tools are emerging, and standards of practice have yet to be formed • Debate may be unrepresentative	Should supplement, not replace, other media monitoring and stakeholder activity	Civil Defence monitored Twitter conversations after earthquakes in Christchurch twitter.com/nzcivildefence

Signpost or support

Potential activity	Potential objectives	Benefits	Risks	Risk mitigation	Examples
Provide links to user-generated or government sites for information, advice or discussion	• Increase discussion on live consultation or current services • Signpost information, advice and services to specific groups of users who indicate particular needs • Reduce level of duplicated information/advice provided from government and user-generated sites	• Promote transparency in government by distributing information more widely and publicising government in more places • Lead New Zealanders directly to online transactional services	• Information or advice provided by linked-to site may be inaccurate or misleading • The link may offer sites a competitive advantage, by increasing the volume of visitor traffic • The debate on linked-to sites may contain inappropriate content • Uncertainty around cost/benefits	• Where feasible and appropriate, use of standard disclaimers relating to content of external (e.g., non-government) sites • Provide contact for other sites to request links • Monitor content of sites to ensure that they are relevant and appropriate	• Careers New Zealand provides links to careers resources in TradeMe job forums. • Civil Defence released links to its website via Twitter after Christchurch earthquakes

Respond

Potential activity	Potential objectives	Benefits	Risks	Risk mitigation	Example
• Correct inaccuracy on blog, forum or wiki • Answer query raised on social networking site, forum or blog	• Increase audience for information • Increase speed of response to misinformation and requests for information • Build trust of public • Move resource-intensive offline tasks to (existing) online self-help communities	• Promote transparency in government by distributing information more widely and publicising government in more places • Achieve accurate media coverage by better distribution of rebuttals and clarifications	• Getting the tone of voice correct (it needs to be tailored to the context, and cannot simply be 'government') • Government intervention in site may not be welcomed • Corrections of information may not be believed • A post by government may be inaccurate or inappropriate	• Post rules should be prominent and understood by site users • Corrections should relate to facts only, not opinion • Posts should be short and provide links to where details of policy or evidence can be found • When possible, contact centre scripts should be followed when providing information or advice	During the 2008 web harvest, National Library received some negative feedback via twitter and blogs, responded, and as a result changed web harvesting policy. http://librarytechnz.natlib.govt.nz/2008/10/2008-web-harvest-let-us-know-how-we-can.html

Discuss

Potential activity	Potential objectives	Benefits	Risks	Risk mitigation	Example
• Set up a group on social networking site • Start discussion thread • Feed in content to a website, or post content on social media site • Departmental-developed (factual) tool dropped on to the site, e.g. one of the Sorted calculators (http://www.sorted.org.nz/calculators)	• Feedback on services • Increase reach of information • Identify gaps in service delivery or information provision • Facilitate discussion across different organisations, e.g. non-governmental organisations, media, government • Move resource-intensive offline tasks to (existing) online self-help communities • Seek input to solutions from the public to regional or national issues or problems	• Reach specific audiences on specific issues • Benefit from the credibility of non-government channels by providing facts and support in the right manner • Complaints may be made, which is an opportunity to truly engage with stakeholders and gain valuable feedback.	• Open to manipulation by interest groups or those with malicious intent • What is the status of complaints made? How will they relate to standard channels? • Responses may be difficult to analyse due to lack of context or difficult to check for accuracy • Government endorsement may add credibility to inaccurate information posted on site • May generate large volume of responses • May be unable to manage information in accordance with organisational policies	• Clarify how long discussions will be active • Understand the audience of the host site – what profile they have and why they visit the site • Contingency planning to accommodate large number of responses • Select either a pre-or post-moderation approach and ensure that participants understand • Make objectives of clear and what might change as a result • Ensure terms of use address the handling of objectionable content and hostile commenters • Clarify how organisational IM policies will be applied	Ministry of health established an active Breastfeeding NZ group on Facebook to discuss issues relevant to breastfeeding mothers. http://www.facebook.com/breastfeedingnz

Debate

Potential activity	Potential objectives	Benefits	Risks	Risk mitigation	Example
• Set up a group on a social networking site and regularly introduce content for discussion • Instigate an iterative discussion with input from government • Open up material on relevant government site for comment	• Consultation, where appropriate • Move resource-intensive offline tasks to (existing) online self-help communities • Seek input to solutions from the public to regional or national issues	• Benefit from the credibility of non-government channels by providing facts and support in a helpful manner • Complaints may be made, which is an opportunity to truly engage with stakeholders and gain valuable feedback.	• Open to manipulation by interest groups or those with malicious intent • Responses may be difficult to analyse due to lack of contextual information • Could create expectations that results provide a mandate for action • Providing feedback on specific issues needs active management • Heated nature of the debate may prompt participants to say the wrong thing, which is then permanently on record • May generate large volume of responses • May be unable to manage information in accordance with organisational policies	• Communicate objectives to participants • Clarify how long discussions will be active, how information will be used and what feedback will be provided • Identify the level of information about respondents that will be required for analysis • Contingency planning to accommodate large number of responses • Have dedicated resource to actively manage online debate • Establish and communicate clear posting guidelines or rules • Clarify how organisational IM policies will be applied	DIA engaged the web community before developing the 2011 'Rethink Online' strategy http://rethinkonline.newzealand.govt.nz/

8. Business case template

The template on the following pages can be used to make the outline case for use of social media. This document is a guide to setting out the rationale and justification for selecting social media as a communications channel, together with relevant risks and mitigations. As with all other channel evaluation, it is important to consider the context in which it will be applied and how that will contribute towards achieving the overall strategic aims.

The suggestions here are not intended to be prescriptive, but instead aim to stimulate thinking around some of the key areas that need to be considered when planning to use social media.

Tips:

- **Be specific** – where possible use hard data to support your business case.
- **Be realistic** – identify where there are gaps and detail how they are being addressed.
- **Be measured** – build in specific targets and a means of evaluation from the start.
- **Be integrated** – consider social media in the context of your wider communications strategy.

Section heading	Prompts for content in this section
Strategy context and aims	• What is the context for this social media project? • What are the strategic vision and aim(s) that this work will contribute to?
Communication objectives	• What are the specific communication objectives that will support delivery of the aims(s), including who you are communicating with and why? • Can these objectives be made SMART (specific, measurable, achievable, realistic and time-bound)?
Critical success factors	• What does success look like? • What are we hoping to achieve (e.g. changes in attitude, awareness, behaviour)? • Can success against these factors be measured?
Audience	• Who are the audience for this communication? • What information or insight do we have about them (e.g. what are their beliefs, attitudes, behaviours and influences)? • What previous attempts at communication with this audience have been made and what has been learned? • What else is out there in terms of social media for this audience?

Section heading	Prompts for content in this section
Options appraisal	• Have a wide range of other communication options been considered? What are they? Social media can be one channel amongst others. • Which factors contributed to your selected approach? • What is your proposed approach, what will be the main activities and when will they be implemented? • How well does the proposed approach help achieve the identified critical success factors, objectives and aim(s) of the strategy? • How well does the proposed approach help achieve the identified critical success factors, objectives and aim(s) of the strategy? • How well does the selected approach fit within your wider communications strategy? • Is your chosen approach accessible to your target audience? • Is there any evidence of similar approaches that have been successful, to support the recommended approach? • What trade-offs, if any, need to be made (e.g. foregoing some off the benefits in order to keep costs low or carefully accepting a higher level of risk to achieve more substantial benefits)?
Benefits	• What direct benefits can be identified (e.g. return on investment, resource requirements)? • How will direct benefits be calculated? • What indirect benefits are there (e.g. quality of service, improved credibility, ability to reach specific audiences on specific issues, better understanding of audience views)? • How will indirect benefits be measured? • Are there any trade-offs in terms of benefits (e.g. balancing the level of benefits against risks and costs)?

Section heading	Prompts for content in this section
Risks and mitigation	• What are the risks or threats to achieving the stated objectives and benefits? • Do you have the necessary skills, experience and resource to support this approach? • Have you ensured that the terms of use and privacy policy of any third party service provider you propose to select are acceptable to your agency, if necessary in consultation with your legal team? • Do you have the relevant authority to do this and have you consulted the necessary communication guidance? • How likely is it that the identified risks will happen and what could the impact be? • What could be done to mitigate the risks and who will own these actions?
Dependencies and assumptions	• What assumptions underpin this approach and what is being done to test them? • What skills, experience and resource (e.g. IT capability or funding) will be needed to implement this approach? Are they available and, if not, where will they be found? • If the approach does not address all of the communication objectives, what other activity is planned? • How does this approach fit with other strategy and policy issues in the department?
Resources required	• What skills, experience and resource will be needed to implement this approach? Are they available and, if not, where can they be found? • How much ongoing resource will be needed to maintain this approach and is it available? • Will delivery be largely in-house or will an external provider be required? • What is the total budget required?
Evaluation	• How will success at all levels (i.e. against benefits, critical success factors and specific objectives) be measured? • Have you considered both quantitative (e.g. number of interactions) as well as qualitative (e.g. measure of influence) means of evaluation? • Are metrics in place to monitor progress against targets/objectives?