

 **naara Bulletin 2014-XX. Guidance on managing social media records.**


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 **Agenda.**

Purpose of the Bulletin.
Defining social media records.
Identifying and addressing challenges.
Scheduling social media content.
Implementing social media capture.
Records Management responsibilities.

 **What is the purpose of this bulletin?**

Supersedes naara Bulletin 2011-02: Guidance on Managing Records in Web 2.0 Social Media Platforms.
High-level requirements and best practices for capturing records created when Federal agencies use social media.

 **What is social media?**

 **What are social media records?**


Social media content meeting the definition of Federal records must be managed in accordance with all applicable laws and regulations.
The statute and its implementing regulations place responsibility with each agency to determine what Federal records they create or receive.

6  **What are social media records?**

If any answers are YES, then content is likely a record:
Does it contain evidence of an agency's policies, business, or mission?
Is the information only available on the social media site?
Does the agency use the tool to convey official agency information?
Is there a business need for the information?

7  **What are social media records?**

Social media content may be a Federal record when the use of social media provides added functionality.
It must have content, context, and structure along with associated metadata.
The complete record must be maintained to ensure reliability and authenticity.

8  **What are noteworthy Records Management challenges associated with social media?**

Recordkeeping.
Content in multiple places.
Ownership and control.
Identification of records.
Development and implementation of schedules.
Capture.
Personally identifiable information.
Public expectations.

9  **How should agencies address the records management challenges associated with social media?**

Articulate clear processes, policies, and recordkeeping roles and responsibilities.
Areas to consider include:
Identifying records.
Defining ownership.
Terms of service.
Communicating policies.

- Monitoring use and value.
Monitoring changes to Terms of Service.
- 10 **How should agencies address the records management challenges associated with social media?**
Establish a social media working group to:
Identify complete records including the content, context, structure, and necessary metadata.
Review existing records schedules to determine if social media records are covered.
Discuss records management issues before rolling out new social media initiatives or changing current use.
- 11 **What should agencies consider when scheduling social media content?**
Agencies must identify the official record and determine how it will be managed.
- 12 Determine whether an existing disposition authority applies, including the General Records Schedule.
If the content is not covered, a new schedule should be developed.
If content is enhanced, a new schedule should be developed that encompasses the complete record.
Changes in tool use may affect the record-value of the information.
Agencies should regularly review their tools and associated records schedules.
- How do agencies implement social media capture?**
- 13 **Temporary records may not need to be captured.**
 Assess business needs and evaluate risks.
 Capture long-term and permanent records.
 Export into a recordkeeping system.
 How do agencies implement social media capture?
 Methods to capture social media records include:
- 19 Using web crawling software.
 Using web capture tools to capture content.
 Using platform APIs.
 Using RSS Feeds, aggregators, or manual methods.
 Using tools built into some social media platforms to export content.
- How do agencies implement social media capture?**
Capture will depend on the technical configuration of the social media. Agency needs may also
- 20 affect which capture method is utilized.
Agencies must provide training on how and when to use capture tools.
Agencies may need to work with third-party providers to implement capture.
- What are an agency's records management responsibilities when dealing with providers and third parties?**
- 21 Be aware that the provider could discontinue their service or delete information from an agency's account.
Agencies may stop using a platform at any time.
In either situation, the agency is not relieved of its records management and possible capture obligations.
- Determine if provider can export the complete record.
 If yes, include instructions for notification and export requirements.
Agencies will have other business and legal needs regarding capture and should work with providers to ensure these needs are met.
- A sample contract is shown.**
- How does this Bulletin relate to the Managing Government Records Directive?**
- 23 NARA will issue updated transfer guidance.
- 24

naara is also investigating automated technologies to manage digital records, including social media.

naara will revise the General Records Schedule.

25  **What other naara guidance is available?**

A White Paper on Best Practices for Social Media Capture.
Records Express Blog.

A Report on Federal Web 2.0 Use and Record Value.
Toolkit for Managing Electronic Records.

Frequently Asked Questions About Records Management.

26  **White Paper. Scope.**

Current state of social media capture in the Federal government.

Examples of current agency capture policies.

Building blocks for creation of best practices.

Overview of software and tools for social media capture.

27  **Table of available tools and software.**

 **Hoot suite.**

 **If this, then that.**

 **Live Office.**

 **Memento.**

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33  **Questions.**