

# Social Media in Government

## Hands-on Toolbox

---

Government Information Services  
Department of Internal Affairs  
November 2011  
**Version 1**

# Contents

<b>1. Overview</b>	<b>4</b>
Companion document	4
<b>2. The five core social media tools</b>	<b>5</b>
Social networks	7
Media-sharing networks	11
Blogs	15
Wikis	21
Forums	25
<b>3. Reporting</b>	<b>30</b>
Weekly summaries	30
Transcripts and back-ups	31
‘End of activity’ report	31
User checks	32
Effectiveness in context	32
<b>4. Sample participation rules for users</b>	<b>34</b>
<b>5. Sample moderation policy</b>	<b>36</b>
<b>6. Accessibility issues</b>	<b>37</b>
<b>7. Legal considerations</b>	<b>38</b>
Terms of use	38
Copyright and NZGOAL	38
Privacy	39
Party political comment	39
Staff contributions	39
Security of people	40
Defamatory and other objectionable comment	40
Linking	40
Conflicts of interest	41
Confidentiality	41
Public Records Act and Official Information Act	41
Public Finance Act and indemnities	41
Procurement rules	42
Authentication	42
IP Guidelines	42
Consultation obligations	42
Fair Trading Act	42
Data sovereignty (or control)	43

## Examples of social media in action:

Tea-break tweets	6
Careers outreach	7
Supporting breastfeeding mums	9
Crowdsourcing images	12
Distributing content on YouTube	13
Blogging business advice	16
Engaging with the public	21
'Making Tax Easier' forum	26
'Rethink Online' forum	29
Effective reporting	30
Promoting sport on Facebook	34
Requesting data sets online	43

## Acknowledgments

The New Zealand Department of Internal Affairs would like to thank the Cabinet Office and the Central Office of Information of the United Kingdom for allowing us to reuse, alter, and repurpose portions of their document 'Using Social Media'. To view an overview of the United Kingdom's document, visit [www.coi.gov.uk/socialmedia](http://www.coi.gov.uk/socialmedia).

## Licensing

Crown copyright ©. This copyright work is licensed under the Creative Commons Attribution 3.0 New Zealand licence. In essence, you are free to copy, distribute and adapt the work, as long as you attribute the work to Department of Internal Affairs and abide by the other licence terms. To view a copy of this licence, visit <http://creativecommons.org/licenses/by/3.0/nz/>.

# 1. Overview

This document has been written to help practitioners who are setting up social media profiles and using social media 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.

This document:

- provides useful examples of how social media is being used effectively by government agencies
- 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
- 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.

## Companion document

A companion document, entitled 'Social Media in Government: High-level Guidance' has been written to help organisations when they are trying to decide if they should use social media in a communications, community engagement, or a policy consultation context. It is intended to be useful to managers and leadership teams, but also provides basic principles, code of conduct issues, and 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.

The 'High-level Guidance' document takes you through the issues that need to be considered before your organisation 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.

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. The five core social media tools

The following sections are designed to help you to use the five core social media tools. These pages outline the strengths and weaknesses of particular social media tools and provide guidance on how to find, assess, contribute to and track social media.

The five core social media tools are:

1. **Social networks** – A term often used to refer to the websites used to connect and interact with other individuals. Interaction is often informal and entirely web-based. Examples include Facebook and Twitter.
2. **Media-sharing networks** – Websites that allow users to share video and images. They also allow users to comment on their own media and the media uploaded by users. Examples include YouTube and Flickr.
3. **Blogs** – Short for weblog. A blog is a content-managed website that presents its entries in reverse chronological order and allows visitors to comment. Blogger and WordPress are examples of popular blogging tools. Examples of blogs include Public Address (<http://publicaddress.net/>) and Stuff's lifestyle blogs (<http://www.stuff.co.nz/life-style/blogs/>).
4. **Wikis** – Web-based applications which allow users to add content to or edit a web page. The most popular example is Wikipedia.
5. **Forums** – Online applications for holding themed discussions between groups of participants.

In the sections that follow, each of these five core social media tools is sub-divided into the following four steps, which represent concrete actions taken during social media use.

1. **Find** – Begin with looking for the relevant websites and communities that are already out there.
2. **Assess** – Once you've found relevant websites and communities, you'll need to evaluate them to see if they're worth participating in.
3. **Contribute** – Now you can begin actively leaving comments and writing posts.
4. **Track** – You'll need to monitor activity and collect statistics to ensure that you have a reasonable return on investment and that you are meeting your goals.

### Before you use the tools

The guidance assumes that:

- you will be operating in a professional capacity
- you will be contributing to or establishing a social media site or associated online community
- you have received the necessary permission or appropriate delegations from your manager
- you have informed and briefed management, press, communications, IT/web and any policy colleagues likely to be affected or called upon to contribute to or support the activity
- you have carried out appropriate planning, objective setting, resource allocation, risk assessment etc.

As with any new venture, be sure you talk to seasoned users of social media in order to share ideas and learn from their experience. Also be sure to read the basic principles and code of practice information in the companion document, 'Social Media in Government: High-level Guidance'.

## Technical competencies

Effective use of social media does require some basic technical competencies.

It is essential that you are able to:

- explain basic terminology – for example, URL, RSS, upload, browser, header, the difference between a blog comment and a post
- use a search engine to locate an item without knowing its address
- work with two or more browser windows open simultaneously, and be able to work back and forth between them; use keyboard shortcuts – for example, Ctrl X (cut), Ctrl C (copy), Ctrl V (paste), Ctrl A (select all)
- bookmark a website
- save an image found on a website to your desktop
- bring up the contextual menu for an item and select an option from the list.

The ability to edit and upload an image, photo, audio clip or video is desirable, as is the ability to run refined searches using the advanced features on search engines.

## IT and IM policies

In some agencies access to social media sites may be blocked for business reasons. You may have to request specific access to such sites from your IT helpdesk.

Strategic decisions about using social media may have implications for an agency's Information Technology and Information Management policies. You should discuss such implications with your internal experts.

## Accessibility

Note that accessibility issues need to be considered when implementing social media tools. For example, agencies setting up their own blogs, wikis or forums still need to adhere to the government accessibility standards. See the Section 6. Accessibility issues on page 37.

## Feedback & dialogue

Many of the principles and processes involved in the use of social media will resemble those of other conventional communications and engagement channels. As with these more familiar channels, the more experience we build collectively and as individuals, the more effective and efficient our use becomes.

You are encouraged to share your successes and lessons learnt with your peers both in your agency and across government. Consider joining public forums such as the Government Web Community or the Network of Public Sector Communicators to share what you've learned and to learn from others.

### Social media in action:

#### Tea-break tweets

"With almost 4,000 followers on Twitter, the National Library's tea-break tweets are more popular than ever and continue to provide a unique angle into our collections.

"We tweet comments and links to interesting historical images and newspaper clippings from our various collections. Many people re-tweet these and add their own comments. This enables us to engage with customers where they live online, rather than expecting them to come to us.

"The success of tea-break tweets demonstrates the power of social media in allowing us to engage with customers that may otherwise not be aware of our services."

Matt O'Reilly  
Web Manager  
National Library  
<https://twitter.com/nlnz>

# Social networks

## Strengths

- Use of social networking sites is a mainstream and popular activity online, driven by scale and a wide range of interactive features.
- Setting up user accounts on third-party sites is often a free and straightforward process; in contrast, setting up and site hosting is expensive. Therefore, it may be cheaper to use existing social networks.
- Good for profile building, bypassing traditional media, providing information updates or informal networking; also sometimes suitable for consultation and deliberation.
- Sophisticated content and community management features.
- Network sites often combine social media applications and are, therefore, multipurpose.
- Applicable to generic or niche user groups, and can broaden and deepen network (through creation or joining up to existing networks).
- Can support large numbers of users and user generated content.
- Provide access to media assets and distribution channels.
- Possible to develop specialist applications for use on most network sites.

### Social media in action: Careers outreach

“Establishing a presence on a social networking platform is easy, but getting meaningful engagement is the real challenge.

“So on top of joining social networks where we are likely to have influence, we also actively do social media outreach, which has been very successful.

“We go to where our target audience is and talk to them there. For example, we go to the forums like TradeMe Jobs and NZGirl and help people who are asking questions or wanting advice on their careers.

“It’s a great way to provide links back to our careers information.

“We’ve confirmed much of conventional wisdom – that for instance, a voice that’s not authentic draws no responses from the crowd. But if you’re genuine and truly helpful, people respond well.”

Yenping Ye  
Information &  
EvidenceCareers New Zealand

## Weaknesses

- Difficult to build and maintain visibility amidst volume of media carried on sites.
- Can be difficult to track activity around site beyond user accounts.
- Some sites carry third-party adverts, over which users have very limited control.

## Find

Much of the activity in social networks tends to happen on a few large sites. Examples include:

- [www.facebook.com](http://www.facebook.com)
- [www.twitter.com](http://www.twitter.com)
- [www.linkedin.com](http://www.linkedin.com)
- [plus.google.com](http://plus.google.com)
- [www.bebo.com](http://www.bebo.com)

Given the significant growth of Facebook in New Zealand between 2007 and 2010<sup>1</sup>, many organisations wanting to use social media set up a Facebook profile by default. However, the social media space is

<sup>1</sup> The Nielsen Company [www.nielsen-online.com/intl.jsp?country=nz](http://www.nielsen-online.com/intl.jsp?country=nz)

anything but static and the rise of other social media networks is bound to happen. Bebo's popularity has declined in recent years, and in June 2011 Google launched its Google+ project, which is widely seen as a direct challenge to Facebook.

Within the large-scale sites, users then organise themselves into groups. Some sites offer users the ability to set up their own demographic or interest-specific social networks, for example:

- [www.ning.com](http://www.ning.com)
- [www.freshnetworks.com](http://www.freshnetworks.com)
- [www.goingon.com](http://www.goingon.com)

Lists of social networking sites are beginning to appear, for example:

- [http://en.wikipedia.org/wiki/List\\_of\\_social\\_networking\\_websites](http://en.wikipedia.org/wiki/List_of_social_networking_websites)
- [http://en.wikipedia.org/wiki/Category:Online\\_social\\_networking](http://en.wikipedia.org/wiki/Category:Online_social_networking)

You may also consider running a search through a standard search engine, such as Google, Yahoo or Bing. A basic search should incorporate keywords relating to the subject you are interested in (for example, 'travel advice', 'fire officers', 'food safety') and the term 'social network'. You may also consider using the word 'community'.

## Assess

The user demographics on different social network sites vary hugely. The value of a networking site will be largely determined by whether or not you are able to reasonably identify and interact with relevant users (and, to a lesser extent, access/upload the media you want).

1. **Scan the design** - Quality, colours, brand presence and structure can all tell you something about the site, its users and its scope.
2. **Read the 'About' section** - A link to the 'About' section is usually found at the top of the page or in a footer. Company information and contact details are often found here as well.
3. **Review statistics** - Site statistics are sometimes found in 'About' sections. These can relate to the number of registered users, uploads and other market information (such as session length, visits and advertising income). All help build up a picture of the site and its community.
4. **Review terms of use and privacy policies** - It is important to review the terms of use and privacy policy of a social networking site. Pay particular attention to what is said about user privacy, content ownership and licensing rights and the community's rules of engagement. The more support provided to the user the better.
5. **Does the site require registration?** - If so, in order to perform which functions?
6. **Does the site carry advertisements?** - Are these generic or targeted to users/groups? Would association with these advertisements present any conflicts of interest or cause any offence?
7. **Is member information public, restricted or private?**
8. **Check the groups list** - Some sites will have a list of members and groups where you can find out the purpose of the groups, the number of members and popular activities.
9. **Run a specific search on the site and its owner(s).**
10. **Contact the owners** – In some cases, potential consumers of specific platforms are able to contact the owners of the platform to find out more information. Explain your interest in general terms and request the detail that you need to be able to make a judgement.

## Contribute

Networking sites combine various forms of social media, so a given site is likely to offer chat, blogging, forum and media-sharing functionality. For this reason, please consult the appropriate guidance depending on the functionality you are using and in what capacity (facilitator, moderator or user).

The following points pick up on practices that are specific to or pronounced on social networking sites.

### Profile information

Networking sites invite users to share information about themselves. Users are in control of what information they provide and share with other users. It will usually be possible to update or remove information as you go.

You are not obliged to provide profile information but users will be reluctant to interact with anyone who does not provide contextual details. You should provide only the minimum of personal information, prioritising information about your position and professional interests wherever possible.

### Choosing an avatar

Most social networking sites ask users to create or upload a profile picture or avatar. You are not obliged to use a real picture of yourself, or use this feature at all. However, again, users will be reluctant to interact with those who do not.

Choices of profile picture or avatar features should be appropriate and relevant. Consider using an agency/department logo, but only with the consent of your agency

### Making contacts

You are encouraged to add users to a 'contacts' or 'friends' list. Practice varies across sites, with some social networks making it possible to add whichever contacts you wish, whereas others only allow 'adds' by invitation.

Contacts are found through the search facility on a site. You are not obliged to accept all invitations and should read any available profile information thoroughly before making a decision. Similarly, try to provide sufficient contextual information when making your own requests.

Contacts can be removed at any time.

### Creating and joining groups

Most social network sites offer users the ability to create sub-groups. You are not obliged to join or create groups; however, doing so can make your use of a social networking site more efficient and effective.

When creating a group, provide a descriptive name, a relevant summary and review all administration options (such as moderation controls and invitation procedures). You can invite users to join directly or allow them to find the group under their own volition. Provide notice in advance if you plan to close or temporarily suspend your group.

Contact the site administrators if you wish to raise the profile of your group, but be aware that this may involve a charge and contractual agreements.

### Social media in action: Supporting breastfeeding mums

"We wanted to support breastfeeding mums and their whanau in initiating and maintaining breastfeeding to six months and beyond – building online support networks and promoting breastfeeding in public spaces. So we set up a BreastfeedingNZ page on Facebook.

"The success of the Facebook page is due to the members themselves, as they're able to support each other 24/7. The community has grown to almost 6,000 people with posts being viewed over 15,000 times each day. Real mother admins help to make our Facebook presence 'real' to the community.

"Time and time again the members have stated the importance of the breastfeeding community in establishing and supporting good practice and normalising breastfeeding, which is what our objective is.

"We're really happy with how successful it's been."

Olivia Tuatoko  
Portfolio Manager  
Family and Whanau  
Ministry of Health  
[www.facebook.com/breastfeedingnz](http://www.facebook.com/breastfeedingnz)

When joining groups, review all contextual information provided and any member details. Some groups will require a request, while others will allow any users to join.

Be conscious that there may be a number of relevant groups and carry out a thorough search. There is no limit to the number of groups you can join but be aware that some groups may require more intensive participation than others.

You can leave a group at any time.

## Receiving updates

There is a lot of activity on social networks, some of it more substantial than the rest. Almost all activity you or your contacts undertake generates an update, which will be flagged when you log in or sent out as an email update.

Updates can be managed in your profile on an ongoing basis. With the volume in mind, you may consider the value in setting up a specific email account to take receipt of updates.

## Using and developing applications

Larger social networks allow users to develop applications that sit within the site and which other users can add to their profile. These often provide additional functionality, such as the ability to launch mini surveys, play games and exchange assets.

Use of applications is usually free and you are able to add as many applications as you wish. Choice of applications used should be appropriate and relevant.

Developing applications is a good way of adding value to a social network and can help to raise the profile of your team or corporate activity. However, application development requires technical expertise, and you should consult with your IT/web support.

Be aware that setting up applications or purchasing assets and space on social networks may involve a cost. Investigate thoroughly and factor this in to your planning.

## Track

- 1. Check profile and group statistics** - Most sites will provide a basic level of analytical data around your profile and groups.
- 2. Review updates** - Most sites will provide a summary of profile and group-specific updates upon each login. General site updates will also be provided, and are worth checking on a regular basis.
- 3. Use applications** - Many applications have been developed to help users track their contacts' profiles, developments in groups and site activity in general. Browse availability through a site's search function.
- 4. Check discussion spaces regularly** - Keep track of community issues and actively request feedback over the duration of the activity.
- 5. Set up email alerts** - Consider setting up a specific email account to take receipt of activity alerts and manage contacts.

See also Section 3. Reporting on page 30.

# Media-sharing networks

## Strengths

- Sharing media is a familiar and popular online activity driven by quality and quantity of content.
- Setting up user accounts on third-party sites is often a free and straightforward process; setting up and site hosting by oneself can be expensive.
- Good for profile building, bypassing traditional media, providing information updates or informal networking.
- Use of media-sharing sites is often a cost-effective hosting solution and an effective distribution channel.
- Access to a rich pool of media assets.
- Requires basic facilitation by individual or team.
- Supports low-level user interaction and networking.
- Produces rich analytical results around media.
- Can be stand-alone or you can embed the media, hosted by the third-party site, within your own site and use your own site's commenting features to stimulate discussion.

## Weaknesses

- Limited community management features.
- Difficult to build and maintain visibility amidst volume of media carried on sites.
- Difficult to track activity around site beyond user accounts.
- Some sites carry third-party adverts, over which users have very limited control.

**Note:** Social networks and media-sharing networks actually overlap. For example, you can share media through popular social networks such as Facebook and Twitter. On the other hand, media sharing networks like YouTube or Flickr create communities of people gathered around the sharing of media. Sometimes a social network may be the best place to share images and video, depending on the audience.

## Find

1. **Use a standard search engine** - Including 'sharing' or 'media' alongside your subject search terms can help focus the results.
2. **Use a bookmarking site** - These media directories collate content flagged by internet users. At the time of writing, popular examples include:
  - [www.digg.com](http://www.digg.com)
  - [www.stumbleupon.com](http://www.stumbleupon.com)
  - [www.delicious.com](http://www.delicious.com)
  - [www.pinboard.in](http://www.pinboard.in)
3. **Use a specific sharing site** - These sites allow users to upload, download and view specific types of media. Popular examples include:
  - [www.youtube.com](http://www.youtube.com) (video)
  - [www.flickr.com](http://www.flickr.com) (photos and video)

- [www.vimeo.com](http://www.vimeo.com) (video)
  - [www.friction.tv](http://www.friction.tv) (video with text and SMS commenting)
  - [www.apple.com/itunes/store](http://www.apple.com/itunes/store) (audio files – you can list podcasts with iTunes)
  - [www.twango.com](http://www.twango.com) (various)
4. Use a social networking site - Many social networks allow media sharing, for example:
- [www.facebook.com](http://www.facebook.com)
  - [www.twitter.com](http://www.twitter.com)
  - [www.myspace.com](http://www.myspace.com)
  - [www.bebo.com](http://www.bebo.com)

## Assess

The value of a media-sharing site will be largely determined by whether or not you are able to access/upload the media you want. However, there are some additional means of finding out information about the site and its owner(s).

1. **Scan the design** - Quality, colours, brand presence and structure can all tell you something about the site and its users.
2. **Read the 'About' section** - A link to the 'About' section is usually found at the top of the page or in a sidebar. Contact details are often found here as well.
3. **Review statistics** - Site statistics are sometimes found in 'About' sections. These can relate to the number of registered users, uploads and other market information (such as session length, visits and advertising income). All help build up a picture of the site and its community.
4. **Review terms of use** - It is important to review the terms of use and privacy policy of a social networking site. Pay particular attention to what is said about user privacy, content ownership and licensing rights and the community's rules of engagement. The more support provided to the user the better.
5. **Does the site require registration?** - And for what aspects of use?
6. **When was the last upload?** - Is this a site in continual, periodic or waning use?
7. **Does the site carry advertisements?** - Some sites will carry adverts around the edges of the site, but other sites will target and even embed videos on the media that users upload.
8. **Does the site offer a player?** - Can you playback/view the media once it has been uploaded to the site? Are you also then able to embed the player and media on other sites?
9. **Check the footer** - At the end of the page is often additional information about the site and those involved in it. Sometimes there will also be contact and statistical information.
10. **Run a specific search on the site and its owner(s)**

### Social media in action: Crowdsourcing images

"We're using Flickr to crowdsource images for our Register of New Zealand's historic places. Having images in the Register really helps the entries to come alive, but not all registered places currently have an image.

"On Flickr we ask for certain places or types of building to be photographed and people post their images to our photo pool. Then we contact the people whose images we want to use for the Register. Currently the Flickr group has 99 members.

"We don't have the resources to hire photographers to do this work, and crowdsourcing the images has the flow-on effect of raising awareness of historic places, engaging the public, and inspiring conversation around historic buildings. All of these outcomes feed into our business goals."

Rebecca O'Brien  
Registrar  
New Zealand Historic Places Trust  
[www.flickr.com/groups/nzhpt\\_images\\_project/](http://www.flickr.com/groups/nzhpt_images_project/)

11. **Track back to main site** - Clicking on a search result may land you on a page within a site, rather than on a home or introductory page. Use the site navigation or crop the URL in the browser address bar to move back through the site.
12. **Contact the owners** - In some cases, potential consumers of specific platforms are able to contact the owners of the platform to find out more information. Explain your interest in general terms and request the detail that you need to be able to make a judgement.

## Contribute

### As a moderator

There are a number of moderation options for media-sharing sites – checking before publication, checking after publication or allowing users automatic publication if they have had two or more published files. It is recommended to opt for pre-publication moderation.

The convention is to allow the users who upload the material to moderate any comments appended to their upload. Users are often also encouraged to provide sub-levels of moderation through rating good content and flagging content that is inappropriate or offensive.

Sites providing hosting of media are ultimately responsible for its legality (subject to statutory defences in certain contexts). Nonetheless, to reduce this liability, all users uploading media are usually prohibited from uploading anything for which they do not have the required rights or permissions (e.g., copyright) or that is otherwise illegal or likely to cause offence.

As always, moderation should be regular and thorough.

### As an uploading user

1. **Read all terms of use and any uploading instructions** - Ensure that you are fully aware of the ownership or licensing rights you may be parting with once the media is uploaded and published on the site. Where any doubt exists, contact colleagues in your agency's legal or communications teams.
2. **Register with a site** - Wherever possible, upload all media under the same account. Where appropriate, open a group or channel to pool your media. Make basic contact details visible to other users.
3. **Upload only relevant and high-quality media** - Quality of image and sound are important. However, try to optimise for good download speeds as well. In terms of quantity of uploads, less can be more.
4. **Provide a summary** - Include an explanation and some context with your upload.
5. **Categorise and tag media** - Tags are keywords that users will search by to find your upload. Categories identify your upload in general subject or thematic terms.

### Social media in action:

#### Distributing content on YouTube

"We've just started using YouTube as a way of pushing our content out beyond the walls of our websites. The plan is to find users where they are, draw them back to our websites, and establish our content as part of a wider online ecosystem.

"We're also increasingly keen that people re-use our content and YouTube provides a really easy mechanism for that. At the same time we can embed the content on our sites and partner sites without having to host it ourselves.

"One of the great things that YouTube offers is stats on views, where videos have been embedded across the web, what search terms are leading viewers to your content, and even which bits of a video are most viewed.

"We're not sure yet where this will take us but it's a great chance to experiment in a content format that's new for us and find out more about our audience."

Matthew Oliver  
 Manager, Web Team  
 Manatu Taonga -  
 Ministry for Culture and Heritage  
<http://www.youtube.com/user/manatutaonga>

6. **Pool media** - Add your upload to pools/groups of subject or theme-related media uploaded by other users.
7. **Specify licensing and terms of reuse** – Where feasible, include any copyright information alongside your upload (or within it), and instruct other users on their rights to reuse the upload (note, however, that third party hosts like YouTube often contain provisions in their terms of use requiring content contributors to agree to specific types of re-use by others).
8. **Moderate comments thoroughly and promptly** - Opt for pre-publication moderation and aim to approve a user comment within 24 hours of its submission during the working week. Read a comment fully before approving it. Answer relevant questions promptly.

### As a viewing/downloading/embedding user

1. **Check copyright and other terms of reuse** - Before downloading or reusing any media, confirm the source and check any relevant terms and conditions.
2. **Comment where appropriate** - It is not always necessary to comment on other users' uploads. When comments are appropriate, do so under your own name.
3. **Rate and link/bookmark significant media** - Many sharing sites allow user rating; rating content helps other users find and navigate the site. Bookmarking draws attention to content outside of the site.

At the time of writing, popular bookmarking services include:

- o [www.digg.com](http://www.digg.com)
- o [www.stumbleupon.com](http://www.stumbleupon.com)
- o [www.delicious.com](http://www.delicious.com)
- o [www.pinboard.in](http://www.pinboard.in)

#### 4. **Flag inappropriate, offensive or illegal content**

5. **Contact media owners** - If you require more information about a piece of media, contact its owners; explain your interest in general terms. If no contact information is provided, leave a comment or, if appropriate, contact the site's managers.

### Track

It can be difficult to track specific media with any precision. Most sharing sites will provide users with access to some basic statistical information, such as views and the number of inbound links. Media owners are sometimes provided with some additional information through their account page.

Running a specific search may uncover information on those linking to or commenting on the upload.

See also Section 3. Reporting on page 30.

# Blogs

## Strengths

- Blogging is a mainstream activity and there is a standard format making it instantly recognisable and easy to follow for users.
- The technical set-up and maintenance of blogs is straightforward, and content and community management systems are included as basic features. This means that set-up can take place within minutes.
- Free software and hosting are available, as well as open source and proprietary packages.
- Best suited to informal tone, and regular and succinct entries.
- Best suited to use on an ongoing basis.
- Good for profile building, bypassing traditional media, providing information updates, running timetabled consultation or informal networking.
- Can support large numbers of users and user generated content.
- Text led but capable of carrying rich media (such as photographs or embedded videos).
- Can be authored by an individual or a team, and access privileges can be set by the administrator.
- Good for improving social network and search engine visibility through linking.
- Good substitute for e-newsletters.
- Easy to track and monitor (through built-in statistical packages and third-party services).
- Can be stand-alone.

## Weaknesses

- Blogging has a significantly informal ethos.
- Blogs need to be information-rich and require large volumes of content to draw upon.
- Bloggers have to be good at networking with peers and users.
- Best suited to one-to-many communication or conversation; less suited to debate or deliberation.
- Blogs may not be the best home for the content being posted. Consider re-purposing blog content onto a parent or related website, or at least linking to it. Otherwise the content can become somewhat inaccessible to users, especially once it falls off the blog frontpage.

## Find

1. **Use a specialist blog search engine or directory** – At the time of writing, popular and free examples include:
  - [www.bloglines.com](http://www.bloglines.com)
  - [www.google.co.nz/blogsearch](http://www.google.co.nz/blogsearch)
  - [www.nzs.com/media/blogs/](http://www.nzs.com/media/blogs/)
  - [www.kiwiology.com](http://www.kiwiology.com)
2. **Use a standard search engine** - Including 'blog' in your search terms can help limit the search.

- 3. Use the links in blog posts and comments** - Once you find a relevant blog, it pays to explore the permanent links in its sidebars, and embedded links in the posts and user comments for leads.

**Tip:** Search engines and directories often don't pick up exactly the same results, so it is always worth searching on two or more.

## Assess

The best way of determining the nature and relevance of a blog is to read it. However, there are some additional means of finding out information about the blog and its author(s).

- 1. Scan the design** - Quality, colours, incorporation of adverts and structure (or the lack of it) can all tell you something about the blog, the author and its users.
- 2. Check the strapline** - In the header at the top of most blogs there will be a strapline underneath or beside the title summing up the purpose of the blog. For example, the strapline of .the Google New Zealand blog (<http://google-newzealand.blogspot.com/>) is "New Zealand news and notes from Google".
- 3. Read the 'About' section** - A link to an 'About' section is usually found in the navigation bar of a blog, and a summary is often given in the sidebar. Contact details are often found here as well.
- 4. Confirm last update** - When was the most recent post or comment made? If there have been no new posts or comments in the last 90 days, it is unlikely that the blog is still active.
- 5. Review the nature and number of posts and comments** - This will give you an insight into the stature of the blog, the frequency of its use and its rules of engagement.
- 6. Scan the links** - The links in the sidebar, particularly the blogroll, can give you an idea of the scale of the blogger's network, the blog's visibility and the sources the blogger uses.
- 7. Check the footer** - At the end of the blog page is often additional information about the blog and those involved in it. Sometimes there will also be contact and statistical information.
- 8. Run a specific search on the blog or blogger** - Useful free search facilities in this regard include:
  - [www.blogpulse.com](http://www.blogpulse.com)
  - [www.wholinkstome.com](http://www.wholinkstome.com)
  - [www.socialmeter.com](http://www.socialmeter.com)

**Tip:** If a blog seems particularly relevant, or is short on contextual detail, contact the blogger, explaining what you are doing and how they might be able to help. If no contact details are available, post a comment.

### Social media in action: Blogging business advice

"Currently, the main thing that Business.govt.nz can give away or trade off without much additional cost, is business advice and information as it relates to government or the best practice content we have on the site. The Companies Office blog allows us to do that and is a great way for us to share information but in greater detail than Facebook and Twitter can provide.

"A multi-channel communications approach helps us to spread key messages and allows us to connect with our clients on a more personal level as they can comment on the blog and we can reply.

"We recognised that the sheer number of different departments within MED was often confusing to clients so the blog allowed us to bring all of these business units together in one place creating a consolidated brand.

"As a result our brand is stronger than ever, clients understand who we are and what we do."

Caroline King  
Stakeholder Advisor  
Business.govt.nz  
Ministry of Economic Development  
[www.business.govt.nz](http://www.business.govt.nz)

**Tip:** A subjective but informative assessment of 'Must Read' blogs can be found at: [www.kiwiblog.co.nz/must\\_read\\_blogs](http://www.kiwiblog.co.nz/must_read_blogs)

## Contribute

### As a blogger

1. **Be consistent** - Provide a clear statement about the purpose and themes of the blog for the reference of users and stick to it. The best blogs are those where the blogger focuses on writing about what they know.
2. **Post regularly** - A minimum of once a week and not more than twice a day is a good rule of thumb. But more importantly, choose a frequency to blog and stick with it. Be aware that agency blogs that are not kept up to date can be seen as a bad reflection on the organisation.

Read more on this in the following post about out of date company blogs, much of which also applies to agency blogs: [www.shinyred.co.uk/1958/is-it-time-to-kill-your-companys-blog](http://www.shinyred.co.uk/1958/is-it-time-to-kill-your-companys-blog)

3. **Draft until you are definite** - Do not post until you are certain about the message, syntax, grammar and spelling. Avoid editing after publication because this will send out updates to those who subscribe to your blog (via RSS feeds) and may be misconstrued by users.
4. **Use a short descriptive headline** - Every post should have one and will often be a mandatory field in a submission form. Continue the practice with sub-headings within posts.
5. **Categorise and tag posts** - Tags are keywords that users will search by to find your post. Categories identify your post along thematic terms. These tags can be displayed as a list in your blog sidebar, offering users an alternative route to navigate the site. They are also used to create tag clouds, graphical representations of what is covered and how popular it is.
6. **Brevity is the watchword** - Blog posts can be as short as a sentence, but often don't exceed 1,000 words. Break up the body of your post into paragraphs of not more than four sentences. Use plain English wherever possible. Link to other websites or upload attachments where more detail is required.
7. **Use other media** - Consider the option of using a photo, audio clip or video instead of text. See the section on media sharing below for more information on creating and hosting other media.
8. **Link up** - In all posts, cite your sources and related resources using either the URL or by embedding a link in a relevant keyword. It is also important to link to other relevant blogs – either in posts or in the permanent links in a sidebar.
9. **Promote discussion and feedback** - Raise questions and discussion points in your posts for users to pick up on.
10. **Sign off** - If there is no profile section, visible author information or you are one of a group of authors, sign off your post with your name, job title/team and agency/department/

### As a moderator

There are a number of moderation options – checking user comments before publication, checking them after publication or allowing users automatic publication if they have had two or more published comments. Opting for pre-publication moderation is recommended when dealing with a public audience.

1. **Allow comments** - Commenting is a standard feature of blogs. Users should be required to supply a working email address and preferably a full name, although these will not be displayed. Where a site is marketed as a blog but comments are not permitted, provide a clear reason for this decision.

2. **Don't worry if you don't get a lot or any comments** - Users will read a blog more regularly than they will post comments. Similarly, don't worry if you get lots. Posts usually generate most comments in the first week after posting, and then comment frequency will quickly tail off.
3. **Provide a set of commenting rules** - These should be linked to from your 'About' page and/or sidebar. The rules should be presented to commenters before comment submission in a way that makes them binding, for example, through a 'click to accept' process or a link to the rules close to the submit button (see page 34 for sample language).
4. **Moderate regularly and thoroughly** - Most blogging platforms will offer an email alert function when new comments are posted. Aim to approve a comment as soon as possible and within 24 hours of its submission during the working week. Read a comment fully and check any links (by clicking through) before approving it.
5. **Don't edit people's comments** - Publish all comments that abide by the rules in their original format. Where you would like to publish a comment but it breaks a rule, email the author and highlight the applicable rule and invite them to resubmit.
6. **Do not delete comments** - Comments that have been approved should not be removed at a later date unless they are found to contravene a rule - such as being racist, abusive, defamatory or unlawful. Keep a copy file of all unapproved comments (except spam).
7. **Interact with comments** - Either make a comment of your own or address a number of comments in a new post. Be critical and insistent where required, but be cordial and proportionate also. You are not expected to reply to every comment; however, try to answer direct questions.
8. **Only block users as a last resort** - If users persistently breaks the rules, consider blocking/blacklisting them. You may consider emailing them with a warning beforehand.

**Tip:** Most blog software will have a spam filter feature as standard, which should prevent spam or alert you to its presence. Never publish or respond to spam comments. An extra level of protection can be provided by requiring users to type in an encrypted validation key when they post a comment. Sometimes known as a 'captcha', this is when a site displays distorted letters and numbers that it then asks the user to enter. Note that there are accessibility issues with 'captcha' systems.

**Tip:** For a generally good guide, see the United States Air Force Guide to responding to blogs: <http://www.web-strategist.com/blog/2008/12/31/diagram-how-the-air-force-response-to-blogs/>

## As a user

1. **Read a post fully before commenting** - It may also be worth checking the links in the post as well. If a post is unclear, post a comment asking for clarification.
2. **Read any commenting rules** - Most personal and some corporate blogs will not have an explicit set of commenting rules, but it is worth checking.
3. **Stay on topic**
4. **Draft and spell-check your comment before submitting** - Many blogs will allow you to preview before submitting. Very few will allow you to edit after publication.
5. **Be succinct** - Comments are generally short. A good rule of thumb is to keep a comment to under half the length of the original post.
6. **Keep the discussion going** - Some comments you will make as an end in themselves, but on occasion invite the blogger and/or other users to respond.
7. **Sign off** - Some blogs will ask for a name and a relevant website address to be appended to your comment automatically. Consider also signing off your comment with your name, job

title/team and agency/department/office. This will help give your contribution authority and context.

- 8. Check back occasionally** - Because discussion on blogs is asynchronous, you may receive a reply instantaneously or months later. It is not mandatory to follow up on a previous comment. And expect responses from other users rather than the blogger.
- 9. Expect disagreement** - Be prepared to have to clarify or restate your point. Be prepared to ask others for clarifications. Be critical and insistent where required, but be cordial and proportionate also. Do not be reticent to disagree, but avoid altercations (try to address the wider community, rather than a specific user). It is possible to contact the blog's author if you believe you are receiving unfair treatment or a rule is being broken. However, this should be a last resort.

## Track

### As a blogger

- 1. Ping your blog** - To 'ping' your blog or post is to notify a search engine of updates. Some blog platforms do this automatically but it is worth registering with ping services manually too (you only have to do this once). At the time of writing, popular free sites to ping with include:
  - [feedburner.google.com](http://feedburner.google.com)
  - [www.pingomatic.com](http://www.pingomatic.com)
  - [www.pinger.blogflux.com](http://www.pinger.blogflux.com)
- 2. Use trackback** - 'Trackback' is a function that enables authors to keep track of who is linking or referring to their posts. Most blog software will have a trackback feature as standard. Another external service is available at

You can also run a specific search on the blog or post. Useful free search facilities in this regard include:

- [www.blogpulse.com](http://www.blogpulse.com)
  - [www.wholinkstome.com](http://www.wholinkstome.com)
  - [www.socialmeter.com](http://www.socialmeter.com)
- 3. Check your analytics regularly** - Page views, unique visitors and session lengths are useful metrics. Check metrics for specific posts as well as the blog as a whole. Check at least twice a week. Keep in mind that it's important to report against your strategic objectives, not just list your stats.
  - 4. Read comments fully** - Follow discussions between users as well as those you are directly participating in.

### As a user

- 1. Track comment responses** - There are a number of free services available that allow you to track responses to a comment you have made on a blog without having to return to it. Most involve adding a plug-in to your browser, which you activate when you want it to track a comment. Examples include:
  - [www.commentful.blogflux.com](http://www.commentful.blogflux.com)
  - [www.cocomment.com](http://www.cocomment.com)

**2. Subscribe to blog feeds** - RSS or Atom feeds are to be found on the majority of blogs. Clicking on the RSS or Atom feed button allows you to subscribe to a blog and will send you a notification every time there is an update, meaning that you do not have to keep checking back. Subscribing to feeds is straightforward and means that you don't have to constantly check the site for activity. Feeds are delivered through aggregators, such as:

- [www.google.com/reader](http://www.google.com/reader)
- [www.newsgator.com/ngs/default.aspx](http://www.newsgator.com/ngs/default.aspx)
- [www.bloglines.com](http://www.bloglines.com)
- [www.blogrovr.com](http://www.blogrovr.com)
- [www.netvibes.com](http://www.netvibes.com)

See also Section 3. Reporting on page 30.

# Wikis

## Strengths

- Supports asynchronous, group-based collaborative drafting and editing.
- Free software and hosting available.
- Supports content and community management.
- Best used with stakeholder groups on pre-drafted content.
- Can be stand-alone.
- Can be used on a sporadic, episodic or ongoing basis.
- Easy to track on-site activity.
- Can be password protected.

## Weaknesses

- There can be specialised aspects involved in set-up and facilitation.
- Wikis are often completely text based.
- Can be difficult to generate and maintain user community.
- Site features and components may be unfamiliar to less experienced web users.

## Find

There are wikis covering almost every subject imaginable but there are no specialist search engines or directories for locating wikis. The best way to find a wiki is to run a search through a standard search engine, such as Google, Yahoo or Bing. A basic search should incorporate keywords relating to the subject you are interested in (for example, 'youth work', 'first-time buyers', 'CEO') and the term 'wiki'. You may also consider using the word 'community'.

Occasionally a wiki will be found within another site (see the section on social networks on page 7). Many wikis operate on a stand-alone basis or within a specialist wiki community. At the time of writing, popular locations of wiki communities include:

- [www.wetpaint.com](http://www.wetpaint.com)
- [www.mediawiki.org](http://www.mediawiki.org)
- [www.wikipedia.org](http://www.wikipedia.org)

## Social media in action: Engaging with the public

"When we reviewed the Police Act back in 2007, we set up a wiki as part of our consultation, so people could contribute their opinions. The response we had was incredible. Not only did we have a significant number of people contributing to the wiki, but there was interest from overseas because what we were doing was considered 'extreme democracy'. Now people don't bat an eye when they see online consultations.

"More recently we've had a range of social media initiatives underway, ranging from making our website news and alerts available on Twitter, through to interaction with local communities via Facebook.

"Highlights of our social media efforts include live Facebook chat with Police role models during episodes of Nga Pirihiimana Hou on Maori television to recruit the next generation of officers, and Queenstown Police gaining worldwide publicity for using Facebook to assist in catching a burglar.

"We've received a lot of anecdotal evidence that our work is paying off. We're engaging positively with the public in an environment they're comfortable in. Most recently we were pleased to receive Social Media NZ's 'Best Use' award for June 2011."

Hamish Denston  
Chief E-Publishing Advisor  
Public Affairs  
New Zealand Police  
[www.facebook.com/  
NZPoliceRecruitment](http://www.facebook.com/NZPoliceRecruitment)

## Assess

1. **Scan the design** - Quality, colours, brand presence and structure (or the lack of it) can all tell you something about the wiki, its editors and its users. Some may look similar, because they use the same software, but will operate independently.
2. **Check the summary** - Most wikis will present a short introduction on the landing page or in a sidebar summing up the purpose of the wiki.
3. **Read the 'About' section** - A link to the 'About' section is usually found at the top of the page or in a sidebar. Contact details are often found here as well.
4. **Confirm last update** - When was the most recent addition/revision/edit made?
5. **Check the member list** - Some wikis will have a member list where you can find out the number of members, their names, sometimes some profile information and a list of their additions/revisions.
6. **Check the footer** - At the end of the page is often additional information about the wiki and those involved in it. Sometimes there will also be contact and statistical information.
7. **Track back to the main site** - Clicking on a search result may land you on a wiki within a site. Use the site navigation or crop the URL in the browser address bar to move back through the site.
8. **Run a specific search on the wiki and/or its managers**
9. **Contact the wiki editor(s)/moderator(s)** - Some wikis will require registration to view and registration may be by invitation only. In such a case, contact the administrators, explaining your interest in general terms and request the detail that you need to be able to make a judgement.

## Contribute

### As an editor/facilitator

Wikis are defined by the collaboration between users. Nevertheless, the editor plays a prominent facilitation role during the set-up, collaborative and closing stages of a wiki. Good facilitation of a wiki requires the confidence and trust of the wiki's community, both of which will be earned by displaying the skills of a neutral arbiter and editor.

1. **Build up a contributor community in advance** - This is particularly important where the wiki will be open for a specific period of time. Distribute any instructions and background information before launch. Be clear and frank in the statement of purpose.
2. **Pre-load the wiki with content and structure** - You may wish to pre-load the wiki with any existing or draft content. Be prepared for this content to be revised.
3. **Provide terms of acceptable use** - Users should be required to indicate that they have read and understood these rules at the point of registration. Flag their availability in the 'About' or 'Resources' page (see page 34 for sample language).
4. **Require registration and login to edit** - Note that Cabinet directions and a whole of government direction, applying to departments and Crown agents respectively, are in place regarding use of the igovt services, including the logon service. Detail on those directions can be found on the Government ICT Directions and Priorities website.<sup>2</sup>
5. **Set a sufficient time period for contributions** - Unless the idea is to have a constantly open wiki, provide sufficient notice of the launch date, any milestones and the closing period. The

---

<sup>2</sup> <http://ict.govt.nz/guidance-and-resources/checklist-agencies/mandatory-requirements>

length of the contribution period will obviously depend on the purpose and nature of the desired output.

- 6. Be a named, visible and accessible source of assistance**
- 7. Network with your users** - Pay particular attention to 'power users' (those who post often and constructively).
- 8. Proofread** - Accuracy and detail is important in wikis. Pay attention to minutiae. Encourage users to do the same.
- 9. Flag required content** - Draw users' attention to areas that require content or revisions.
- 10. Insist on citations and respect copyright and privacy** - Facts and figures are important to wikis; it is also important to keep on the right side of copyright and privacy laws. Users have a responsibility in this regard, as do the owner and coordinator of a wiki.
- 11. Make deletions and editorial revisions promptly** - Wherever possible, allow users to edit content. However, be prepared to step in. Remember to provide an accompanying explanation by attaching a comment.
- 12. Block abusive users as a last resort** - Engage disruptive contributors and provide a written email warning prior to any suspension.
- 13. Step in as a neutral arbitrator quickly** - Focus on content, not the personalities.
- 14. Encourage discussion between users** - Users should be able to deliberate remotely prior to making additions/revisions (for moderation techniques, see the section on forums). Many wikis will provide a discussion area on the site.
- 15. Outline next steps** - When the collaboration period closes, provide users with a schedule of next steps.

**Tip:** If you are configuring your own wiki, the WikiMatrix tool at [www.wikimatrix.org](http://www.wikimatrix.org) helps you choose the most suitable software based on your core criteria.

## As a user

- 1. Read terms of use, instructions and any background information**
- 2. Browse and read wiki thoroughly** - Avoid repetition of entries. Identify gaps in facts and figures.
- 3. Review the recent additions/revisions list** - Review recent activity at the start of each new session.
- 4. Keep track of project milestones**
- 5. Review discussion spaces** - Keep track of the community spaces as well as the collaborative spaces on a wiki.
- 6. Start new articles**
- 7. Try to specialise** - Identify areas in which you can add optimal value to a wiki and its community.
- 8. Do not copy** - Do not copy materials from other sources unless you are certain that they are in the public domain or openly licensed. If licensed, abide by any attribution requirements and other licensing terms.
- 9. Avoid self-advertising** - Be proportionate when mentioning relevant agency data, policies and services.

- 10. Draft and proofread** - Attention to detail and quality is crucial to your wiki entries. Do not be hesitant to make edits to the grammar and spelling in other people's entries.
- 11. Flag articles** - Flag the wiki where additions or changes are required to help the editors and other users.
- 12. Be relaxed about collaboration** - Don't be annoyed by changes to entries you have made. Be insistent but don't get into an 'editing war'. Open discussion and involve the editors and the wider user community in the process of resolution. At all times, focus on content, not personalities.

## Track

### As an editor/facilitator

- 1. Review additions and revisions promptly** - Check edits, flags, stub notices and citation requests regularly.
- 2. Keep track of site and server analytics** - This will provide insights into logins, visits and user activity and session length.
- 3. Check discussion spaces regularly** - Keep track of community issues and actively request feedback over the duration of the activity.
- 4. Set up email alerts** - Consider setting up a specific email account to take receipt of activity alerts and maintain contact between editors and users.

### As a user

- 1. Review additions and revisions** - Check edits, flags, stub notices and citation requests on a regular basis.
- 2. Check discussion spaces regularly** - Keep track of community issues and actively request feedback over the duration of the activity.
- 3. Sign up to email alerts** - Consider setting up a specific email account to take receipt of activity alerts and maintain contact between editors and users.

See also Section 3. Reporting on page 30.

# Forums

## Strengths

- Good platform for structured, asynchronous, topic-based consultation or deliberation between large numbers of people.
- Free software available, but is likely to require hosting.
- Excellent community management features come as standard (such as member account management and user profiling).
- Best housed within a larger site and run on an episodic basis.
- Good for building new online communities or adding value to existing communities.
- Best suited for use with stakeholder community.
- Can become popular and valued by the user community.
- Many constituencies of interest will already be served by a forum and will not, therefore, require a new site to be established.
- Can be configured for facilitation or peer-to-peer interaction (reducing the need for moderation).
- Can be set up to be open or password protected (for the benefit of groups for whom privacy is a key concern – for example, commercial advisory groups or victims of domestic violence).

## Weaknesses

- Can be difficult to generate and maintain a user community over a longer period of time.
- May require a team of two or more facilitators, depending on traffic volume.
- Forum technology is very suited to providing community management solutions, but may offer limited ability to manage static site content.

**Tip:** Inland Revenue has developed forum software that provides community management options as well as the ability to manage static site content, and they are happy to offer this software to other agencies. Contact the web team at Inland Revenue.

## Find

There are forums covering almost every subject imaginable but there are no specialist search engines or directories for locating forums.

The best way to find forums is to run a search through a standard search engine, such as Google, Yahoo or Bing.

A basic search should incorporate keywords relating to the subject you are interested in (for example, 'breast cancer recovery', 'new entrant' or 'commuter') and the term 'forum' (or 'discussion board'). You may also consider using the word 'community'.

Some forums will be found within other sites (see the section on social networks), while others will be stand-alone.

**Tip:** TradeMe has an extremely popular message board, and many New Zealanders participate in online conversations there: <http://www.trademe.co.nz/Community/MessageBoard/Default.aspx>

## Assess

1. **Scan the design** - Quality, colours, brand presence and structure can all tell you something about the forum, its moderators and its users. Sometimes forums have a similar look and feel because they use the same software.
2. **Check the summary** - Most forums will present a short introduction on the landing page or in a sidebar summing up the purpose of the forum.
3. **Read the 'About' section** - A link to the 'About' section is usually found at the top of the page. Contact details are often found here as well.
4. **Confirm last update** - When was the most recent post/comment made? If there have been no new posts or comments in the last 90 days, it is unlikely that the forum is still active.
5. **Review the nature and number of posts** - This will give you an insight into the stature of the forum, the frequency of its use and its rules of engagement. Some forums will be closed and require registration to view.
6. **Check the member list** - Some forums will have a member list where you can find out the number of members, their names and sometimes some profile information.
7. **Check the footer** - At the end of the page is often additional information about the forum and those involved in it. Sometimes there will also be contact and statistical information.
8. **Track back to the main site** - Clicking on a search result may land you within a forum discussion, rather than on a home or introductory page. Use the site navigation or crop the URL in the browser address bar to move up through the site.
9. **Run a specific search on the forum and/or its managers** - Use a standard search engine.
10. **Contact the forum manager(s)/moderator(s)** - Explain your interest in general terms and request the detail that you need to be able to make a judgement about whether to contribute or track.

### Social media in action: 'Making Tax Easier' forum

"Our 'Making Tax Easier' consultation was about proposals to change the way people deal with the tax system. Because of the wide-reaching nature of the proposals, it was important to present them in a way that was accessible to the public and encourage a response from them.

"The forum was split into four sections for each of the main audience groups and promoted through mailouts, posters, articles in mainstream media and key stakeholder publications, via other government agencies, on Inland Revenue's website, and through Facebook. Our strategy was to reach as wide an audience as possible.

"The forum gave us value in three ways. First, there was substantial value in getting responses from people who would not have been expected to comment on a conventional discussion document. Second, the comments themselves were of good quality. Third, many people posted comments which were based on earlier comments."

Brent Lewers  
Senior Policy Analyst  
Inland Revenue

## Contribute

### As a facilitator

Facilitation of online forums is a similar skill to chairing an offline meeting. The main (and most important) difference is that the online forum takes place on an asynchronous basis.

1. **Be consistent** - Focus on the theme of the forum at all times, and provide a steady tone in your posts.

2. **Open discussions** - As the facilitator, you should make the first post in a forum (or a specific thread). Your opening post should provide a welcome, a very short introduction, and should encourage posts by users.
3. **Structure questions** - Think about how to structure questions. If there are separate issues, it's better to present separate questions than to confuse the conversation by mixing everything in together.
4. **Promote discussion, focus and structure** - This does not mean influencing or editing, it means active listening, asking good questions and encouraging interaction between the users in ways that will deliver on the aim of the exercise. Some very engaged forums may not require facilitators to post at all.
5. **Post regularly** - The frequency of your posts will be determined by activity in the forum. However, as a good rule of thumb, try to post a minimum of twice a week.
6. **Draft and proofread before posting** - Editing forum posts is possible but not desirable after publication.
7. **Aim for brevity and clarity** - Use a short descriptive headline (in the post's subject field). Break up the body of your post into paragraphs of not more than four sentences. Use plain English wherever possible. Try not to exceed 500 words per post. Use sub-headings.
8. **Sign off** - Facilitator posts should be branded to differentiate them from user posts. However, each individual post should be closed with your name, job title/team and agency/department/office (as a signature).
9. **Recruit experts** - Recognised industry figures can be invited and briefed to provide additional facilitation. Often 'special guests' will help with user recruitment and retention.
10. **Close discussions** - As you approach the closing stages of a forum or thread, invite users to make final points and closing statements. You may choose to ask specific questions to help them conclude or to cover important areas that have been missed. Facilitators should make the final posts to flag that the discussion space is closed, and outline to users what the next steps of the exercise will be and where they can go for updates.

**Tip:** Key to informed, productive discussion is information. Users should be encouraged to bring facts and figures to the forum, but you should also provide basic background information – such as links, a glossary of terms etc. You may also wish to consider providing a set of tips on how to make good posts (see 'As a user' in this section).

## As a moderator

There are a number of moderation options – checking before publication, checking after publication or allowing users automatic publication if they have had two or more published posts. It is recommended to opt for pre-publication moderation when the forum is a public space; opt for a post-publication option where the forum is for known, registered stakeholders.

1. **Provide a set of discussion rules and a moderation policy** - Users should be required to indicate that they have read and understood these rules at the point of registration. Flag their availability in the 'About' or 'Resources' page (see page 34 for sample language).
2. **Moderate regularly and thoroughly** - Whether applying a pre- or post-publication moderation strategy, aim to review a post as soon as possible. Where pre-publication moderation is used, aim to review new posts within 24 hours of their submission during the working week, preferably sooner. Where post-publication moderation is used, check for and review new posts regularly, preferably 3 times per working day. Some forum systems will provide an email alert to enable you to keep on top of new posts. Read all new posts fully. If a post contains concerning content

and you are unsure whether to publish or remove it, consult your manager or legal team. If a post has already been published and the question is whether it should be removed, act with urgency.

3. **Do not edit or delete posts** - Keep a file of all submissions on the forum system or a secure file. Where a post breaks a rule, email the user to explain and request a resubmission. Provide an email warning to persistent rule breakers, and only block users as a last resort.
4. **Allow lateral thinking** - Give users a proportionate amount of space to build up to a point or pursue a side discussion. However, do not be worried about asking users to sum up and get back on track. Alternatively, if you think there is value in it, open another thread.
5. **Allow disagreement** - Good deliberation can and should involve disagreement. Allow strong debate between users except where it contravenes the discussion rules. You may consider asking the users – directly or through a facilitator – to conclude their argument if there has been no settlement after a reasonable amount of time.
6. **Provide regular summaries** - These should be bullets of the main points and conclusions compiled on a weekly basis for the benefit of new registrants as well as veteran users. These should be posted separately from the forum but linked to through a moderator post. Producing summaries will help with your end of activity reporting.

## As a user

1. **Read any forum rules** - Most forums will have an explicit set of commenting rules; it is worth checking these before submitting a post.
2. **Read other posts** - Take the time to read what other users have posted to pick up on information and avoid repetition. If possible, add to existing threads when replying.
3. **Pay heed to moderator posts** - These will provide direction, schedule updates and summaries.
4. **One post is enough, but more is better** - Making a single post in a forum is acceptable; however, where possible, particularly in ongoing forums, post on a regular basis to improve your visibility and authority as a user. Your posts can be questions – they do not always need to contribute new information or be statements. As a rule of thumb, post a minimum of once a week.
5. **Aim for brevity and clarity in posts** - Use a short descriptive headline (in the post's subject field). Break up the body of your post into paragraphs of not more than four sentences. Use plain English wherever possible. Try not to exceed 1,000 words per post. Use sub-headings.
6. **Draft before posting** - You are unlikely to be able to edit after submitting a post.
7. **Stay on topic**
8. **Use facts and figures** - Favour facts and figures to personal experiences and observations when illustrating a point or backing up an argument. Cite and link to sources where possible. Take the opportunity to link to departmental or agency sites.
9. **Keep the discussion going** - Ask for clarifications, expansions and reflections from other users.
10. **Expect disagreement** - Be prepared to have to clarify or restate your point. Be critical and insistent where required, but be cordial and proportionate also. Do not be reticent to disagree, but avoid escalation. Contact the moderators if you believe you are receiving unfair treatment or a rule is being broken. However, this should be a last resort.
11. **Sign off** - Each post should be closed with your name, job title/team and agency/department/office.

12. **Rate/recommend others' posts** - Many forums will allow users to rate/recommend one another's posts. This helps other users and the moderators to use the site more efficiently. Try to rate a range of posts. Try to look at low rated posts occasionally as well as those that are highly rated.
13. **Check back occasionally** - Because discussion on forums is asynchronous, you may receive a reply instantaneously or days later. You may not receive a response at all; nor is it mandatory to follow up on a previous post.

## Track

### As a facilitator/moderator

1. **Check your site and server analytics regularly** - Page views, unique visitors and session lengths are useful metrics from your server logs. At a site level, your system should give you a range of statistics – for example, a list of who has logged in recently, and posts per user. Check at least twice a week and seek to identify trends to help you maintain the momentum of the exercise.
2. **Log in regularly and read posts fully** - Unless you receive email alerts for site updates, remember to log in regularly. Follow discussions between users as well as those you are directly participating in.
3. **Check inbound links** - Use a standard search engine or a specialised service, for example:
  - o [www.wholinkstome.com](http://www.wholinkstome.com)
  - o [www.socialmeter.com](http://www.socialmeter.com)

### As a user

1. **Log in regularly and read posts fully** - Unless you receive email alerts or RSS or Atom feeds for site updates, remember to log in regularly and follow discussions.
2. **Subscribe to RSS or Atom feeds** - Some forums will allow users to subscribe to RSS feeds for the forum as a whole or particular aspects (such as new or popular posts). Subscribing to feeds is straightforward and means that you don't have to constantly check the site for activity. Feeds are delivered through aggregators, such as:
  - o [www.google.com/reader](http://www.google.com/reader)
  - o [www.newsgator.com/ngs/default.aspx](http://www.newsgator.com/ngs/default.aspx)
  - o [www.bloglines.com](http://www.bloglines.com)
3. **Read forum summaries to keep track**
4. **Request a transcript**

See also Section 3. Reporting on page 30.

### Social media in action: 'Rethink Online' forum

"In November 2010, we used forum software to hold the 'Rethink Online' consultation. We wanted to get input from web teams, suppliers and other experts on a new approach to government use of online channels.

"Rather than seeking feedback on a draft document, we used the online forum to present a number of open ended questions designed to kick start an interactive conversation about how to build capability, how to measure quality and how to improve the customer-centricity of online information and services.

"The consultation was advertised in existing online communities and by word of mouth on Twitter. It attracted 1,337 unique visitors and received 226 separate comments from a total of 51 participants.

"The excellent feedback we received from the stakeholder community fed directly into the 'Rethink Online' strategy that we launched in July 2011."

AnneMarie Curtis  
Principal Advisor Strategy  
Department of Internal Affairs  
[rethinkonline.newzealand.govt.nz](http://rethinkonline.newzealand.govt.nz)

### 3. Reporting

Evaluating the effectiveness of a social media component in a strategy is an emerging art. For web metrics, it took time to evolve into commonly understood measures that could inform decision making. Social media is going through the same process. However, even today there are simple ways of evaluating its effectiveness.

The first step is to count – to understand what is happening quantitatively.

It is important to keep track of social media activity and be able to provide an account of it when required (over the duration and at the end). The depth and frequency of your reports on social media activity will be determined on a case-by-case basis, depending on the purpose of the activity, the application and whether you are administering the activity or contributing as a user. The end use of the report will also have a bearing – for example, is the report to be included alongside a larger account of activity, is it to be part of an internal research library, or will it be shared in the public domain?

The following material builds on the tracking guidance provided in earlier sections to provide some generic guidance on producing reports.

Not all social media activity will require weekly (or more regular) reporting. However, deliberative or discussion-based exercises are likely to benefit from weekly summaries, whereas a photo or video library on a media-sharing site is unlikely to need more than a weekly statistical report, unless it generates a lot of comments.

Weekly summaries should contain the latest quantitative data – disregard ‘hits’ and concentrate on new registrations, posts/comments, unique visitors, repeat visits, incoming links and responses made by users following your calls to action. These could be presented as a table or chart containing, for example, the number this week, number last week, busiest week to date and total to date.

Qualitative components should relate to key developments in arguments and any significant factual information submitted. Do not go into detail; opt for bullet points instead. In deliberative exercises, share this qualitative report with the users to keep new registrants and existing contributors up to date. Upload the transcript through the content management system, make it available as a downloadable PDF and/or send it out in an email. However, in some cases, it may be best to let the comments speak for themselves.

The report should end with an account of any new actions required. Be consistent in compiling weekly summaries. The process of producing weekly summaries will make the production of an ‘end of activity’ report more straightforward.

#### Social media in action: Effective reporting

“To help us with reporting on our ‘Making Tax Easier’ online consultation, our web team showed us how to access the comprehensive and free details about the traffic on our site on Google Analytics.

“This helped enormously when our senior management team asked for regular progress updates during the 6-week period the consultation was open for public submission. This was both to keep them up-to-date with the comments that were being received and so they could advise the Minister of progress.

“We combined key statistics from Google Analytics with an overview of the comments posted on the forum, highlighting trends and key issues, into a simple two page weekly report.

“Weekly reporting also gave us the opportunity to reflect as a team, and to think about deploying further marketing strategies when the numbers of new visitors started falling.”

Brent Lewers  
Senior Policy Analyst  
Inland Revenue

## Weekly report content list

The weekly summary should include:

- date of update
- author
- URL
- application
- owner/contributor/team
- purpose/applicability
- time period
- latest quantitative data
- latest qualitative data
- key actions

## Transcripts and back-ups

Agencies should apply records and information management policies to interactions and comments in social media just as they do with other business information. In some cases it may be important to keep transcripts of all posts and/or comments, particularly if the original source is no longer online, or if it is only stored in one system. Seek advice from your colleagues in records or information management.

Transcripts should present a discussion in its original published format. Each entry should be accredited to its author and, wherever possible, be accompanied by a time and date stamp.

It is also important to keep a secure record of all submissions not published because they breached the stated rules. Again, each entry should be accredited to its author and, wherever possible, be accompanied by a time and date stamp. It is not necessary to keep a record of spam or repeat entries.

It may be difficult to access a transcript where you do not directly administer the site, or the application does not support transcript export. In these cases, you can request a transcript from the site's administrators or moderators, or copy and paste the content into a document from your browser, noting author and date.

Where you are the owner and administrator of a social media site, at the end of each exercise make a back-up of the site. You may need to request support from colleagues in records/archiving, e-communications and IT to do this. If the activity is ongoing over a long period, it would be prudent to take regular back-ups of the site, the content and the user accounts, in case of technical error.

Remember that the Public Records Act 2005 and the Official Information Act 1982 both apply..

For more information and advice on complying with the Public Records Act 2005, visit the Archives New Zealand website at <http://archives.govt.nz/advice>

Practice Guidelines regarding Official Information are available on the Office of the Ombudsmen website at <http://www.ombudsmen.govt.nz/index.php?CID=100109>

## 'End of activity' report

At the end of each exercise, or at key milestones in the case of ongoing activity, it is good practice to provide – as a package – an executive summary, an in-depth report and any additional documents.

Think about whether or not to leave the site up but with a “closed” message as a record of the discussions.

## 'End of activity' report content list

The end of activity report should include:

- author
- URL(s)
- application overview
- owner/contributor/team – who was involved in the activity, their names and roles
- executive summary – title, objective(s), project, outcome
- third parties – names and responsibilities of third parties involved in set-up, running and reporting
- applicability – what was the purpose of the activity?
- time period – over what period did the activity take place?
- budget breakdown – what was allocated, what was spent
- marketing activity – overview of publicity and measurable results
- user demographics – detailed breakdown of number of registrations and user profiles
- usage trends – number of published/unpublished submissions, unique visitors, repeat visits, session length (average, shortest and longest) etc.
- other key analytics – incoming links, webstats such as visits, bandwidth used etc.
- key posts/comments – significant qualitative input from users and moderators
- qualitative feedback – key correspondence from users outside of the principal deliberation
- assets gained – overview of any reports or media submitted by users
- key findings
- key actions
- appendices – screenshots, transcripts, unpublished comments etc.

**Tip:** You may consider the value in commissioning a third party to carry out the reporting and/or evaluation of your social media activity. There are also a number of software packages available that can automate the quantitative analysis. There are some services that offer semantic analysis of content to give a more qualitative report.

## User checks

Consider asking participants to review the report. Provide a deadline and request comments on omissions or clarifications. Retain editorial oversight but do give genuine consideration to suggestions.

## Effectiveness in context

Having understood what is happening quantitatively, the second step is to put those numbers into a wider context.

It is important to have a plan (with objectives and ideally targets) before you start to evaluate. The danger otherwise is that success is deemed to be based on quantity rather than quality, i.e. 'Is the number bigger than the last time we looked?', rather than 'How are we doing against our objectives/targets and what do we need to do to optimise?'

Measures of influence, not just quantity of connections, are key: are you getting to a few key influencers or lots of people who nobody pays any attention to? For example, one blogger with 10,000 subscribers including key journalists, or 200 bloggers with 50 subscribers each who all just argue among themselves.

Brand metrics may apply if those are relevant dimensions to measure. For example, what attitudes are being expressed and are they changing over time? You might try online polls and quizzes to help monitor this. Also, remember to try and understand what context the comments have been made in: this may help evaluate their relevance, and give you feedback about how your audience perceives the issue and what it means to them.

And don't just monitor 'them' out there. Monitor the effectiveness of your own contributions as an individual/department. Does what you say start conversations and help keep them going, or do you seem to be closing them off somehow?

One of the opportunities of incorporating social media evaluation into campaign work is that evaluation and optimisation can be very closely aligned. For example, the plan may be to evaluate comments and conversations on relevant sites and then join those conversations. In this case, it is important to allow for adequate resource, and possibly training.

Above all, set goals. This is the key to evaluation. As part of defining goals, it is important to understand who you are communicating with and what you want them to do.

## 4. Sample participation rules for users

When directly hosting a social media project – for example, a consultation carried out on a stand-alone forum set up and owned by an agency – rules for users should be provided. This should occur at the point of registration or posting, and require explicit acknowledgement, usually through a tick box acknowledgement that rules have been read and agreed to.

The following are a generic set of participation rules suggesting basic inclusions; adaptations can be made depending on the specific circumstances of the social media activity and they need to be incorporated into a wider set of terms of use.

*This site has the purpose of X. We wish to identify points of action and therefore seek a fair and free exchange of views. In participating on this site, you will be deemed to have agreed to the following terms of use:*

- 1. Be respectful of other users of this site.*
- 2. Stay on topic and do not upload content or post a comment that is unrelated to the purpose of this consultation/site.*
- 3. Do not use language that is offensive, inflammatory or provocative (this includes swearing and obscene or vulgar comments).*
- 4. Do not break the law or encourage others to do so (this includes defamation, breaching privacy, breaching another person's intellectual property rights such as copyright, condoning illegal activity and contempt of court).*
- 5. In the course of using the community areas of this site, please do not post personal information – addresses, phone numbers, email addresses or other online contact details – relating either to you or other individuals.*
- 6. Do not register more than one user account per person.*
- 7. Do not impersonate or falsely claim to represent a person or an organisation. Do not attempt to log on using another user's account.*
- 8. Please provide truthful and accurate submissions, backing up your argument/view with evidence where possible.*
- 9. Do not make any commercial endorsement or promotion of any product, service or publication.*
- 10. Please provide us with your full name and an up-to-date contact email or postal address so that we can contact you if necessary. This will not be published.*
- 11. If you are aged 16 or under, please get your parent's/guardian's permission before participating. Users without this consent are not allowed to participate or provide us with personal information.*

If a comment contravenes any of the rules, do not publish it. Or un-publish it, if using a post-publication moderation strategy. The submission should be returned to the participant by email, along with a reference to the broken rule(s). The participant should then be invited to make appropriate changes so

### Social media in action: Promoting sport on Facebook

“We've seen huge results from social media. The largest benefit I'd say has been significantly raising the awareness of our brand, who we are and what we do.

“Before we began our TRIBE campaign on Facebook, there was a lot of confusion about us and what role we actually played in the sport, but now this seems much better because people can clearly see and hear from us, and directly interact.

“Members are telling others about us, and because we're satisfying their need and keeping them engaged, this leads to more people wanting to join and follow us.”

John Whiting  
Communications Manager  
Triathlon New Zealand  
[www.triathlon.org.nz/tribe](http://www.triathlon.org.nz/tribe)

that the post can be reconsidered. However, if a participant repeatedly breaks the rules, that participant's user account can be suspended and may be permanently revoked.

You may consider adding terms to clarify that users are responsible for what they upload to the site and will indemnify the agency for loss it suffers through users posting content in breach of the terms of use.

For example:

*Please note that you are legally responsible for your comments and any media you upload. . You agree to indemnify and hold X harmless for any loss, liability, claim, demand, damage or expense suffered or incurred by X arising directly or indirectly from your breach of these terms of use.*

Note, however, that the inclusion of indemnities may have a chilling effect on participation and are rarely called upon. Agencies may wish to think carefully before requiring indemnities from their site users, particularly if they are asking for valuable input which they might not otherwise obtain.

Another issue to bear in mind is what re-use rights your agency may wish to confer on people over the content it owns and what re-use rights it may require in respect of user posts and comments. In this context, note that the New Zealand Government Open Access and Licensing framework (NZGOAL) is the Government's guidance for agencies to follow when releasing copyright works and non-copyright material for re-use by others.

Visit <http://ict.govt.nz/guidance-and-resources/information-and-data/nzgoal>.

You should consider the potential application of NZGOAL to content your agency owns or is able to release for re-use, where appropriate. If there is any desire to license, for example, the entirety of a social media-driven discussion (both agency comment and user comment), it will be important to seek legal advice before launching the social media campaign to ensure the terms of use contain appropriate incoming and outgoing licensing provisions.

You should also consider the value of providing participants with a step-by-step guide to constructive use of the site. This will provide orientation and dissuade misuse of the site, but be careful not to be patronising. Consider also providing a set of terms of use that you – as a facilitator – agree to abide by, for review by users.

Media organisations are increasingly using blogs to supplement their correspondents' coverage. These blogs generate participation in the form of comment. As a result, the hosts have written rules that are a good example of steering users to participate in a constructive manner.

In addition to the sample rules above, be sure to look at other blogs and forums and review their participation rules.

## 5. Sample moderation policy

If you are directly responsible for pre- or post-publication moderation of user content, it is important to provide a moderation policy explaining what form of moderation is being applied, who is responsible and how users can contact them.

A sample moderation policy for a forum may look like the following:

### ***Will X consultation/policy team be participating in the discussions?***

*Yes, relevant team representatives intend to regularly visit the forum discussions and, where appropriate, submit posts to encourage discussion.*

### ***What is moderation?***

*Moderation is the practice of facilitating online interaction to ensure that everyone can take part in discussion, get their views across and that the consultation meets its objectives. It is also about maintaining the flow of the discussion by checking all posts in relation to the terms and conditions of the site.*

### ***What is a moderator?***

*'Moderator' is a term for someone who is responsible for making sure that the forum discussion rules are adhered to. A moderator is similar to a chair of a face-to-face meeting and is there to make sure that everyone feels comfortable and able to participate in the online discussion.*

### ***Who are the moderators of this forum?***

*This forum will be moderated by the X consultation/policy team. The moderators always aim to be fair and objective. Moderators are concerned with the quality of the discussion not the interests of one individual, group or idea over another.*

*Direct communication between the participants and the moderators can take place via email. The moderators' email address is X.*

### ***What form of moderation will be used in this forum?***

*There are two types of moderation available:*

- *Pre-publication moderation: where all posts are checked against the terms and conditions before they are published.*
- *Post-publication moderation: where all participant posts are checked against the terms and conditions after they are published.*

*This forum will employ a X moderation strategy. This means that posts will/will not [delete as appropriate] go live instantly. They will be checked regularly by the moderators.*

*During the working week, all posts will go live within 24 hours of submission. Posts made during the weekend will go live on the following business day. Forum spaces are readable at all times and you can submit a post at any time.*

A moderation policy should always link back to the discussion rules. Wherever possible, an alternative means by which a user can contact the department should also be provided in case of a dispute.

When hosting a discussion on a third-party site, check the terms of use on that site and consider adding any additional rules to the space you are providing moderation for.

## 6. Accessibility issues

Web sites are expected to make reasonable accommodations to allow for access by people with disabilities, some of whom may be using specialist assistive technologies. The New Zealand Government Web Standards require that government websites comply at level-AA with the W3C's Web Content Accessibility Guidelines 2.0.

Accessibility often benefits those with and without disabilities alike. If social media features and functionality are not accessible, a potentially significant number of people will be unable to interact with, contribute to, or consume them.

Accessibility should be addressed at the beginning of, as well as throughout, a website's lifecycle. It should certainly be considered when selecting and integrating social media tools with your website. Typical concerns include the accessibility of third-party sharing widgets that are embedded in a web page, and of user generated content and the interface used to create it. In many cases, accessible solutions are available.

Where the publishing of content is concerned, the accessibility of third-party social media websites themselves can be an issue. As a rule, agencies should avoid using non-governmental social media sites as the sole mechanism for publishing government content. If the official version of content is located on a government website, people with disabilities will still have access to that version, regardless of the accessibility of the non-governmental site.

Consult with your departmental web teams and visit the New Zealand Government Web Standards website.

### Accessibility links

- New Zealand Government Web Standards: <http://webstandards.govt.nz/>
- Web Content Accessibility Guidelines 2.0: <http://www.w3.org/TR/WCAG20/>
- Conformance requirements, Level-AA: <http://www.w3.org/TR/WCAG20/#conformance-reqs>

## 7. Legal considerations

This section provides a brief introduction to some of the more common issues that may arise in the context of an agency's use of social media sites or tools. It is not legal advice and should not be relied on in that way.

Most legal issues are avoided by exercising common sense and observing existing codes of conduct. However, the rapid pace of development and some of the unique dynamics of social media may give rise to unfamiliar or ambiguous legal issues. Wherever there is doubt, seek advice from your agency's legal team.

### Terms of use

The [Terms of Use Standard](#) in the New Zealand Government Web Standards states that "agencies must provide terms of use on interactive websites and on websites that require authenticated access", and provides a list of suggested terms for inclusion on such sites.

If your agency is operating its own social media site, it will need to include an appropriate set of terms of use. If it is using a third party service provider's site or tools, it should consider the extent to which it is able to include its own terms of use (recognising that sometimes it may not be able to) or a separate set of rules covering those of the provisions listed in the Terms of Use Standard that are required to achieve its objectives and protect its position.

Agencies are encouraged to consult their legal teams when developing such terms of use.

### Copyright and NZGOAL

Copyright is a property right that exists in certain original works, regulated by the Copyright Act 1994. The categories of qualifying original works include literary works (which can include datasets and databases), musical works, artistic works, sound recordings, films and communication works.

As in offline walks of life, it is important in online contexts to distinguish between copyright in original works and the licensing of works in which copyright exists, as they are conceptually distinct. When, for example, an agency licences a copyright work on its site that the agency owns, the agency retains its copyright ownership but grants permissions to do things with the work (such as copy it) which would otherwise be prohibited. Similarly, when citizens add their own copyright content to a social media site, they retain ownership of the copyright (unless expressly agreed otherwise) and, either expressly or by implication, confer a licence to use that content on the site owner or agency.

Unless entitled to do so by a copyright licence or statutory provision, a person infringes copyright in a work when he or she does any of a number of "restricted acts", the most common of which is copying the work or a substantial part of it.

The main copyright issues for agencies using social media are as follows:

- agencies should ensure they either own the copyright in, or are otherwise permitted to publish, copyright content they place on social media sites (whether their own sites or the sites of external providers)
- where feasible, they should include terms of use requiring site users to have all relevant rights in copyright content before posting that content to a social media site (if a third party service provider is hosting the site, e.g., a social networking site, its terms of use will invariably be to this effect)

- if possible, agencies should also include terms requiring site users to license the agency's publication of their content, to the extent it is protected by copyright, for the agency's intended purposes
- agencies should consider the potential application of the New Zealand Government Open Access and Licensing framework (NZGOAL) to content they own or are able to release for re-use, where appropriate. NZGOAL is government guidance for agencies to follow when releasing copyright works and non-copyright material for re-use by others. It seeks to standardise the licensing of government copyright works for re-use using Creative Commons New Zealand law licences and recommends the use of 'no-known rights' statements for non-copyright material. Full information on NZGOAL can be found on the [ict.govt.nz](http://ict.govt.nz) website. If there is any desire to license, for example, the entirety of a social media-driven discussion (both agency comment and user comment), it will be important to seek legal advice before launching the social media campaign to ensure the terms of use contain appropriate incoming and outgoing licensing provisions.

## Privacy

Your agency will need to take care to comply with the Privacy Act 1993. Careful attention must be paid to the Information Privacy Principles set out in section 6 of the Act.

If you are running your own social media site, be sure to include a privacy policy that complies with the [Privacy Statement Standard](#) in the New Zealand Government Web Standards.

If you are using a third party social media site, include a privacy policy if you can or link to a privacy policy, which is fit for purpose, on another site your agency controls. Ensure that any such privacy policy is consistent with any privacy policy on the third party social media site. Seek legal advice where required.

## Party political comment

A department must not publish material that, in whole or in part, appears to affect public support for a political party. While departments may refer to a current government's proposals, decisions and recommendations in the ordinary course of business, they must not refer to party manifestos or the like.

Above all, remember you are a public servant and must perform your work at all times with integrity and political neutrality. There is an express requirement to this effect in the State Services Commission's [Standards of Integrity and Conduct](#).

The Electoral Act 1993 sets out rules about election advertising which apply at all times (not just in the run-up to an election). Government's operational resources should not be used for such purposes.

## Staff contributions

If your agency is developing a social media site on which contributions from its own staff will be requested or permitted, it may wish to consider whether staff contribution guidelines would be helpful. The purpose of such guidelines is not to be draconian. To the contrary, it is to recognise that:

- online platforms on which people can communicate to the world at large may be fairly novel for some staff
- staff may need guidance on eligibility to contribute (where relevant), how the platform works and who they can approach for help
- staff may need assistance in understanding the reach of the platform, the potential permanence of what they say online and the privacy and security implications of revealing personal information online about themselves or their family and friends

- staff may need guidance on the range of appropriate contributions and what would be considered inappropriate by reference to the nature of their employment, the nature of the organisation's business and any confidentiality or other contractual obligations to which they are subject
- staff may need some basic understanding of copyright and defamation law, as well as of the potential perils of using multimedia files from the likes of YouTube and Flickr when, in fact, the relevant files were uploaded to such sites without the true copyright owners' consent or full copyright in those files has otherwise been reserved
- staff may need to be informed or reminded of any relevant administrative law obligations (whether statutory or common law) and of their obligations under the Standards of Integrity and Conduct.

## Security of people

Agency staff should take care not to post any information that endangers the safety, welfare or security of themselves, other agency personnel or any citizen.

Particular care should be taken when planning any social media campaign that may unwittingly encourage feedback from minors. The safety, welfare and security of children must be protected at all times.

## Defamatory and other objectionable comment

In general terms, a defamatory statement is a statement which tends to lower a person's reputation in the minds of others (and is untrue). A statement may be in the form of, for example, words or pictures, visual images or gestures.<sup>3</sup>

Agency staff should be careful not to make any statements that are or may be considered defamatory of people when using social media tools, even if citizens make such statements against them.

Your agency should also be careful to remove any defamatory or potentially defamatory content from any site it controls as soon as it becomes aware of its existence and its defamatory or potentially defamatory nature. If in doubt, seek legal advice immediately. Online publishers of defamatory comment may have some legal protection until the point that they become of its defamatory nature, but as soon as they become aware they need to take swift action or risk liability as a publisher of defamatory comment.

Note that this legal protection may fall away if your agency undertakes pre-publication moderation of all user content. This makes the quality of pre-publication moderation particularly important. Fortunately, potentially defamatory comment is usually fairly easy to spot.

Agency staff should also keep a watchful eye out for other objectionable content. Content that is racist, discriminatory or otherwise offensive should not be published. If it is published (e.g., where an agency undertakes post-publication moderation), it should be removed as soon as possible.

## Linking

It is good practice to link to other websites and resources, to increase the visibility of your site or the social media channel you're using, to provide alternative sources of information and to stimulate an increase in the number of incoming links and therefore search engine rankings. It is also good practice to expressly allow (and therefore encourage) deep-linking to your own sites by others unless there is a good reason for users to arrive at your site's home page.

Care should be taken, however, in linking to material on third party sites that may be defamatory or otherwise objectionable. It is prudent not to link to such material, regardless of whether doing so might

---

<sup>3</sup> *The Laws of New Zealand*, Defamation title, para 10 (LexisNexis, online service).

give rise to a liability risk for your agency. There is generally no need for government agencies to link to such material in their use of social media.

## Conflicts of interest

If you are discussing another person's story, product or service in which you have or could be perceived to have an interest, consider whether you ought to be discussing it online and, if so, whether you should be disclosing your interest. If in doubt, discuss with your manager or a member of your agency's legal team. Agency staff should not be making any comment online on a topic in respect of which they have an actual, potential or perceived conflict of interest.

## Confidentiality

Staff contributions to social media sites must not relate or refer to any information that is confidential, whether to their agency, wider government or any third party. By way of example, that includes internal reports, communications with other departments and Ministers, evolving policy and legislative initiatives, legal advice, employment-related matters, price sensitive information, budgetary matters, security issues, non-public facts regarding existing or proposed procurements (unless expressly authorised as part of a publication process) or regulatory processes, and non-public documents on an agency's intranet. If you are in any doubt as to whether a contribution may relate or refer to confidential information, consult your manager or legal team before posting it.

## Public Records Act and Official Information Act

Agencies need to ensure that their use of third party social media tools does not hinder them from being able to comply with their record-keeping obligations under the Public Records Act 2005 or their ability to respond to requests for official information under the Official Information Act 1982. See further the section below on data sovereignty (or control).

## Public Finance Act and indemnities

Third party social media sites and tools often contain indemnities in their terms of use in favour of the site owners or service providers.

Following amendments in 2010 to the Public Finance (Departmental Guarantees and Indemnities) Regulations 2007, departments may now give an indemnity contained in the standard terms and conditions for the purchase, licence, or use by the Crown of:

- an Internet site
- software
- information technology tools, products, or services.

Note, however, that under section 65ZE(1) of the Public Finance Act 1989, a department may only grant such an indemnity if it appears to the department to be necessary or expedient in the public interest to do so. Such indemnities should only be granted by a department's Chief Executive or his or her expressly nominated delegate and care should be taken to ensure that any process rules in a department's delegations policy are followed.

Crown entities are likewise able to grant indemnities in certain circumstances. Crown entities should review sections 160 and 163 of the Crown Entities Act 2004 and clause 14 of the Crown Entities (Financial Powers) Regulations 2005 before granting an indemnity.

## Procurement rules

If your agency needs to pay for the procurement of third party social media sites or tools, it should take all relevant procurement rules and guidance into account before making any approach to a specific service provider. This will include some or all of your agency's internal procurement policy, the Mandatory Rules for Procurement by Departments (which are binding on departments) and the Auditor-General's Procurement Guidance for Public Entities.

## Authentication

The Department of Internal Affairs operates the igovt logon service and the identity verification service. Cabinet directions and a whole of government direction, applying to departments and Crown agents respectively, are in place regarding use by departments and Crown agents of the igovt services. Departments and Crown agents should review these directions before developing any proposal to invest in or build online credential management or identity verification capability as an alternative to using all-of-government shared authentication services. Detail on the directions can be found on the Government ICT Directions and Priorities website.<sup>4</sup>

## IP Guidelines

Sometimes agencies wish or need to contract software developers to build custom modules or plugins for their social media campaigns. If your agency has such a need, it should consider who ought to own the intellectual property rights in the developed modules or plugins, by reference to the [Guidelines for the Treatment of Intellectual Property Rights in ICT Contracts](#).

Note also that, if your agency has a module or plugin developed that interoperates with an open source content management system, and either your agency or the developer wishes to distribute it, it may need to be distributed under the terms of the open source licence of the content management system. Consult your legal team for guidance.

## Consultation obligations

If your agency is proposing to use a social media channel to carry out or supplement a legally required consultation process (and note here that consultation processes may be required by statute or the common law), be sure to touch base with your legal team first. Your agency will need to ensure that use of the proposed channel is appropriate, consistent with any legally prescribed steps, that the right audience(s) will be canvassed, that different groups of consultees are treated equally in terms of the information given to them and the time they have to respond, that full records of the consultation can be made for evidential purposes and that offline channels are also used to the extent required or appropriate.

## Fair Trading Act

If your agency is using a social media channel in a commercial context, e.g., in the context of a procurement activity, ensure that staff using it appreciate the importance of not unwittingly saying anything that could be characterised as misleading or deceptive as this could constitute misleading or deceptive conduct under the Fair Trading Act 1986. The same level of rigour applied to communications in offline channels (in terms of their accuracy) should be applied to communications in online channels.

---

<sup>4</sup> <http://ict.govt.nz/guidance-and-resources/checklist-agencies/mandatory-requirements>

## Data sovereignty (or control)

Data sovereignty or data control is a term that, in government circles, generally means the ability of the government to retain legal control over its own data, and citizen data for which it is custodian, by keeping the data within its own jurisdiction. The rationale is that, by doing so:

- both the data and New Zealand-based organisations to which the government may outsource storage and/or processing of the data remain subject to New Zealand law and the control of New Zealand courts, and
- agencies are able to comply with legislation binding upon them (recognising that, in outsourced service provider contexts, additional contractual provisions may be required to enable such compliance).

The use of certain social media services based overseas may, in some cases, raise data sovereignty issues, in terms of an agency's ability to comply with the Official Information Act 1982, Privacy Act 1993, Public Records Act 2005 or Unsolicited Electronic Messages Act 2007. Agencies remain bound by these Acts even if they outsource social media activities to offshore providers.

However, the potential existence of such issues is not, of itself, cause for alarm or reason to reject the use of social media services based overseas. What is important is identification of the issues and determining whether or not they can be addressed to your agency's satisfaction. (Note also that some of these issues arise in the context of using any third party social media service, even if based in New Zealand.) The key issues are:

- whether your agency will be able to comply with requests for information under the Official Information Act
- whether your agency will be able to store and access public records for the purposes of the Public Records Act
- whether your agency can be confident that there will be no loss or misuse of personal information that may be collected from citizens through its use of the service (such as non-public email addresses)
- whether your agency can be confident that the service provider will not obtain inappropriate rights to agency data, user-generated data, or personal information
- whether the service provider reserves the right to communicate directly with users, for example, sending commercial messages to users who may have signed up to the site to communicate with your agency (and, if so, whether in context that is inappropriate)
- whether the service provider holds itself out as your agency's provider for specific purposes and, if so, the implications of that, and
- whether the reputation of the service provider, its terms of use and privacy policy, and the jurisdiction(s) in which it is based give your agency confidence in the service provider, the security of

### Social media in action: Requesting data sets online

"On data.govt.nz we're enabling an open, online conversation with our 'data request' tool. It allows people to ask the government to release specific sets of data so that the data can be reused.

"People have asked for datasets like traffic incident locations or the geospatial data for housing status of Christchurch properties after the earthquakes. We notify the relevant government agency, and the agency's response is posted on the website.

"So far we've had 36 data requests. Three of those have resulted in datasets being released to the public, while another two were for datasets already listed on data.govt.nz. Another 14 requests are currently being investigated.

"It's great to see an open conversation between the public and the government, all being held online."

Nadia Webster  
Senior Web Specialist  
Internal Affairs  
[www.data.govt.nz](http://www.data.govt.nz)

its infrastructure and the likelihood of receiving helpful and customer-centric service in the event of data-related issues or problems.

With those issues in mind, when considering different social media services, your agency is advised to:

- review the services' functionality in terms of data export and feed options (the ability to export data in useful formats or subscribe to it by way of Atom or RSS feed will likely enable your agency to make local data back-ups for both ready access and, to the extent required, archiving)
- check the service providers' terms of use and privacy policies with a view to spotting any terms regarding content ownership, content re-use, use or security of personal information, data retention on account closure, or the service providers' relationship with your agency, that may give rise to concern
- consider, to the extent reasonably practicable, whether the service providers are credible, trustworthy and likely to represent stable propositions for the nature and duration of your agency's use of their services, and
- consider, again to the extent reasonably practicable, whether the jurisdictions in which the service providers are based give rise to concern in relation to treatment and protection of personal information (where relevant) and other data, as well as enforcement of contractual rights.

Consult your agency's legal team to the extent required.