



## Managing Social Media Records

For State Agencies and Local Governments in Texas

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## Welcome to the Webinar

**To hide or unhide your Control Panel**

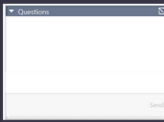
- Click the red arrow at the top left of the panel. 

**Trouble hearing with headset or computer speakers?**

- Click the Audio Setup link in the Audio Pane for source selection and/or adjust the volume settings on your speakers or computer.

**Have a question or a comment?**

- Type in the blank box in the Questions Pane
- Click "Send".



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## Certificate of Completion

To obtain a certificate of completion:

- Go to the online course: <http://bit.ly/slrwebinars>
- Download certificate template. 
- Fill out and save or print your certificate.

✉ HELP: Email us at [slrinfo@tsl.texas.gov](mailto:slrinfo@tsl.texas.gov)

An archived recording and all supplemental materials will be available at the link above (<http://bit.ly/slrwebinars>)

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## Before We Dive In...



Assumptions

- ✓ Decision was made to use social media.
- ✓ Your organization is already actively or passively creating social media records.
- ✓ Content will be or is already being created and published.

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## Agenda



- Definitions & Identifying Records
- Challenges
  - Capture and Storage
  - Retention and Disposition
  - Policy Considerations
- Resources: Links and supplemental materials for further guidance

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## Definitions & Identifying Records



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### What is a government record?



- Documenting the transaction of public business
- Created or received by or on behalf of a governmental body
- Recorded information in any medium

Local Governments - Bulletin D  
State Agencies - Bulletin 4

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### What is public information?

- "The general forms in which the media containing public information exist include a book, paper, letter, document, e-mail, **Internet posting**, text message, instant message, other electronic communication, printout, photograph, film, tape, microfiche, microfilm, photostat, sound recording, map, and drawing and a voice, data, or video representation held in computer memory." - Gov Code, § 552.002

<http://www.texasattorneygeneral.gov>



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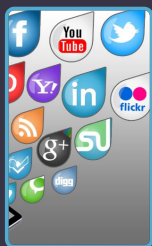
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### What is a Social Media Record?



- **Social Media:** forms of electronic communication through which users create online communities to share information, ideas, personal messages, and other content.
- **Social Media Tool:** a software system or service provided via the Internet used to communicate and share information between people.

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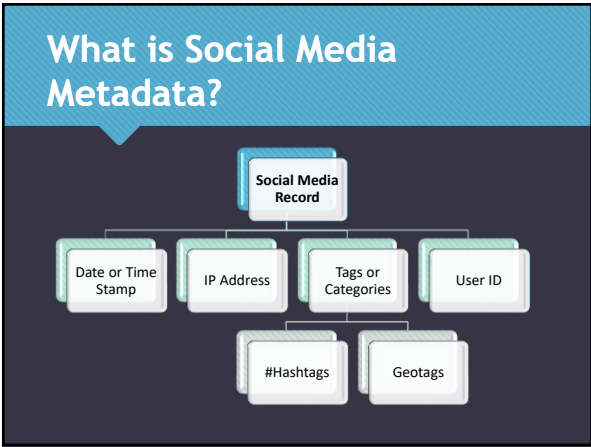
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### Challenges of Capturing Social Media



Capture all content with associated metadata as the complete record



Some social media records will be easier than others to capture

- o Records can be updated frequently
- o Content located on multiple platforms
- o Collaborative creation of records

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### Strategies for Capture

**1**

Rely on staff to save externally posted records into a repository that can be managed internally.

- Copy and paste social media posts into word processor app.
- Save as un-editable PDF.

**2**

Use software or browser add-ons to capture and store content or take screenshots of record content.

- [getgreenshot.org](http://getgreenshot.org)
- [webrecorder.io](http://webrecorder.io)

**3**

Contract with a social media or backup provider and form Service Level Agreements to ensure that the records are accessible.

**4** Automated Web Archiving Software

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### Strategies for Capture: Web Archiving Software




<http://www.archive-it.org>



<https://archivesocial.com>



<https://www.smarsh.com>



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Provider	Paid Service	Product Description & Use Cases	Platforms Able to Capture	Method of Capture	Notes
<a href="#">Archive Socialite</a>	✔	Socialite provides products to assist in the backup and management of social media content.	Facebook, LinkedIn, Twitter, YouTube	Facebook	
<a href="#">Web Archiver</a>	✔	Web archiving service uses CIMA tool for regulatory compliance and e-discovery aimed at corporations to capture, store, and sort web content for e-discovery and regulatory compliance. Provides a number of service plans.	Facebook, Twitter, LinkedIn, YouTube, web sites	Web crawlers regularly crawl and capture web sites as complete snapshots and display the content in its original form (no URL re-writing, no JavaScript injection, etc.) They use the Web Archive (WARC) format (ISO 28500:2009). Content can be stored with them or on own servers.	
<a href="#">Atraveo</a>	✔	Provides content management within the tool. It is unclear if it captures content with related metadata.	Facebook, Twitter, YouTube, web sites	Content management system captures social media content when it publishes to the platform.	
<a href="#">Archify</a>		Archify captures and organizes social media streams and traces activity and makes it searchable and accessible across all devices.	Facebook, Twitter, LinkedIn		
<a href="#">ArchiveFacebook</a>		Mozilla Firefox plug-in saves content from Facebook accounts directly to hard drives, including photos, info, messages, activity stream, friends list, notes, events and groups.	Facebook	Prototype called Facebook Archiver uses a modified version of scrapybot to perform specific AJAX requests in order to capture each page of a Facebook account. Modifying the internal linkage of the captured pages will make the archived collection easier to browse.	
<a href="#">Archive-It</a>	✔	Subscription service from the Internet Archive allows institutions to build, manage and search their own web archive.	Facebook, web sites, Twitter	Harvest web content according to subscriber's frequency preference for each URL, they are capturing, including "on demand" capture requests, such as the case of a historic event.	
<a href="#">ArchiveSocial</a>	✔	Automatically captures and archives social media content for compliance, records management, and e-	Facebook, Twitter, LinkedIn, YouTube		No software installation required.

National Archives and Records Administration

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### Retention and Disposition Challenges

- No one-size-fits-all schedule.
- Determining what electronic information is valuable enough to merit the cost of maintaining it long-term.
- Allocating the cost of managing social media into government budgets, which are already stretched thin.
- Designating roles and responsibilities for reviewing records to determine retention and disposition.

A graphic illustration with a dark blue background. On the left, the text "Retention and Disposition Challenges" is written in white. To the right, there are four bullet points. At the bottom left, there is an illustration of a person sitting at a desk with a laptop, and another person sitting on a globe.

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### Common Record Series

Record Number	Record Title	Record Description	Retention Period	Remarks
Local: GR1000-33 State: 1.1.019	<b>Public Relations Records</b>	News, press releases, or any public relations files maintained or issued by an agency. Includes print, electronic, audio, and audiovisual records.	<b>2 Years</b>	Retention Note: Review before disposal; some records may merit PERMANENT retention for historical reasons.
Local: GR1000-04	<b>Open Meeting Notices</b>		<b>2 Years</b>	
Local: GR1050-13 State: 3.1.012	<b>Employment Ads</b>	Internal or external announcements or advertisements of job openings, promotions, training programs, or opportunities for overtime.	<b>2 Years</b>	29 CFR 1602.31, 1602.40, and 1602.49

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### Common Record Series

Record Number	Record Title	Record Description	Retention Period	Remarks
Local: GR1000-04 State: 1.1.006	<b>Complaints</b>	Complaints received from the public by a governing body or any officer or employee of a local government relating to government policy.	<b>Resolution or dismissal of complaint + 2 years.</b>	Retention Note: The 2-year retention period applies only to complaints of a general nature that do not fall into a different category of complaint noted in this or other commission schedules.
Local: GR1000-47 State: 1.1.038	<b>Customer Surveys</b>	Surveys returned by the customers or clients of an agency, and the statistical data maintained rating an agency's performance.	<b>Local: Report + 3 Years State: After Final Disposition of Summary Report</b>	

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### Common Record Series

Record Number	Record Title	Record Description	Retention Period	Remarks
Local: GR1000-26b State: 1.1.008	<b>General Correspondence</b>	Incoming/outgoing and internal correspondence pertaining to the regular operation of the policies, programs, services, or projects of a local government.	<b>2 Years</b>	Retention Note: Records management officers should use caution before disposal of these records to ensure the records should not be classified under administrative correspondence (GR100-26a).
Local: GR1000-26c	<b>Routine Correspondence</b>	Correspondence and internal memoranda such as letters of transmittal, requests for publications, internal meeting notices, and similar routine matters.	<b>AV</b>	

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Agency Code: 313		Agency Name: Texas Department of Information					
Agency Item No.	Record Series Item No.	Record Series Title	Description	Years	Months	Days	Remarks
AU.053		Social Networking Communications	Consists of content (messages, posts, photographs, videos, etc.) created, submitted or received using a social media application that is strictly a duplicate, transitory in nature, or a record copy of the information exists elsewhere. [At DIR, content is captured routinely from individual social media sites and stored until retention period has expired.] Includes blogs, wikis, Twitter, Facebook, YouTube, Flickr and other related applications.	2			Caution: content on a social media application that meets the TGC § 441.189 (11) definition of a State record and is not a duplicate record, transitory or retained elsewhere must be captured by a responsible party and maintained for the full retention period of the appropriate record series. Caution: The State has no control over retention policies of social media sites. State records must be captured and maintained in a system under DIR's control.

**Social Media Records on the Retention Schedule**  
Example: D.I.R.

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1. Agency Code: 301		2. Agency Name: Office of the Governor					
3. Agency Item No.	4. Record Series Item No.	5. Record Series Title	6. Description	7. Ret. Code	8. Retention Period		
					Years	Months	Days
324	1.1	Social Media Communications	Content (messages, posts, photographs, videos, etc.) created or received using a social media application.	AC	2	0	
9. AC Definition		10. Archiv	11. Remarks	12. Legal Citations			
AC = Date created or received.		R	CAUTION: Contact the RMO if an account is to be deactivated or deleted. Social media content must remain accessible until retention is met.	13 TAC § 6.94(a)(2)			

**Social Media Records on the Retention Schedule**  
Example: Governor's Office

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## Disposition of Social Media Records

- Retain based on content. Destroy in accordance with retention schedules approved by TSLAC. Destroy all copies.
- Enter on disposition log.
- Follow rules for destruction holds.
- Option to keep permanently.

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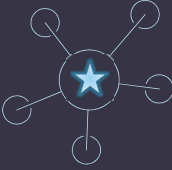
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## Recap: Capture, Retention & Disposition



- 1 Determine if it is a state record
- 2 Classify and determine record series
- 3 Capture record
- 4 Maintain record
- 5 Dispose of record

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## Policy Considerations



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## Social Media Policy Elements

- o Accessibility
- o Privacy & Security
- o Open Records Requests
- o Records Retention
- o Terms of Service
- o Moderation and Monitoring
- o Intellectual Property Rights and Ownership
- o Employee Use
- o Linking



Social Media Policy Model:  
<https://www.tsl.texas.gov/slr/recordspubs/stbull01/resources>

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## Privacy and Security of Records

Only public information may be posted on social media websites.



**General Information**  
All content and comments posted to this official City of Austin, Texas, Facebook site are subject to public disclosure laws. This includes private messages sent to this page. Posted comments do not necessarily reflect the views or position of the City.

This social media site shall not be used to submit open records requests to the City of Austin. Please direct open records requests to <http://austintexas.gov/ir>.

Comply with existing IT security policies, standards, and guidelines.

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## Terms of Service & Ownership of Records

- Terms of Service reviewed by legal counsel
- Terms of Service for Governments  
[https://www.facebook.com/terms\\_pages\\_gov.php](https://www.facebook.com/terms_pages_gov.php)
- Third-party website policies

**Government Terms**  
**Amended Terms for Federal, State and Local Governments in the United States**  
If you are a federal, state or local government or government agency in the United States ("You"), and by following terms apply solely to such use and all other terms remain in effect.

**1. Disputes**  
You and Facebook will endeavor to resolve any disputes in an amicable fashion. To the extent arbitration applies to Official Use by federal users.

**2. Notice and Governing Law**  
Terms relating to venue and governing law do not apply to your Official Use. For federal government and by the laws of the United States of America (without reference to conflict of laws) and, in the absence of California will apply.

**3. Indemnity**  
If you are the federal government or a federal government agency in the United States:  
Terms relating to indemnification do not apply to your Official Use except to the extent expressly authorized.  
If you are a state government or state government agency in the United States:  
Terms relating to indemnification will apply to You only to the extent expressly permitted by your jurisdiction.  
If you are a local government or local government agency in the United States:  
Terms relating to indemnification will apply to You only to the extent permitted by your jurisdiction's laws.

**4. Disclaimer Requirement**  
If you have an official website, your Page must contain, in a prominent location, "If you are looking for more information, please visit our official website at [URL]."

**5. Endorsement**  
For federal government agencies, Facebook will not use your name, seals, trademarks, service marks, other Facebook Services, to state or imply an endorsement of Facebook Services. However, Facebook will use your name, seals, trademarks, service marks, other Facebook Services, as necessary for Facebook's operations.

**6. Advertisements**  
For federal government agencies, if you submit a written request to Facebook to block the display of any advertisements, we will honor that request. If you have decided to make such blocking technology generally available for page administrators, we will honor that request.

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- NARA Best Practices for the Capture of Social Media Records
- DIR Social Media Resource Guide
- ARMA IMM Best Practices for Governing Social Media
- TSLAC Draft Social Media Policy Template

For Further Guidance...

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Thank you for attending!

- **Questions?**  
(512) 463-7610 or [slrminfo@tsl.texas.gov](mailto:slrminfo@tsl.texas.gov)
- **More webinars available at**  
<https://www.tsl.texas.gov/slrn/training>

Questions?

Illustrations by Undraw.co

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