

August 10, 2011

## ADMINISTRATIVE PROCEDURES FOR ESTABLISHING SOCIAL MEDIA ACCOUNTS

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### A. Prior to Establishing an Account: Administrative Steps.

- SI Social Media Participants desiring to establish an official social media account first must obtain the approval of a direct supervisor to confirm that the SI Social Media Participant is authorized to spend official time on social media activities, to open the social media account, and to serve as the Social Media Point of Contact (POC) for that account.
- Upon approval by the direct supervisor, the SI Social Media Participant must obtain approval to open an official social media account by the director of the SI unit or such staff to whom the director has delegated approval authority for social media activities within the SI unit.
- Once approved, **if the account is to be hosted internally**, SI units must consult with the Office of the Chief Information Officer (OCIO) prior to launching to ensure future supportability and maintainability of these activities on SI servers.
- Once approved, **if the account is to be hosted externally**, the SI Social Media Participant must check the Approved Social Media Provider List, once available on SharePoint, and maintained by the Office of Contracting and Personal Property Management (OCon&PPM) to determine whether the social media provider has been approved for use by the Smithsonian.
  - If the desired social media provider is not listed on the Approved Social Media Provider List, the SI Social Media Participant must send the provider's "terms of use" and "privacy policy" to [OCONHelp@si.edu](mailto:OCONHelp@si.edu) and the Smithsonian Privacy Officer (SPO), at [privacy@si.edu](mailto:privacy@si.edu), for approval. New providers not already included on the Approved Social Media Provider List must be approved by OCon&PPM and the SPO before the Participant can accept the terms of the click-through license. If changes are needed to the provider's "terms of use" and "privacy policy," OCon&PPM will negotiate such revisions. OCon&PPM shall identify Smithsonian

Institution Archives (SIA) as the point of contact on any terms of service negotiated with a social media provider. Upon approval of new social media providers, OCon&PPM will update the Approved Social Media Provider List and notify SIA and the Office of Public Affairs (OPA). SIA will record the new account in the Social Network Registry maintained by SIA at <https://collab.si.edu/sites/OUSFA-SIA/SIA/webregistry/Registry%20Wiki/Social%20Media%20Providers.aspx>.

**Remember: click-through licenses required by social media providers are contractual agreements and most Smithsonian employees do not have contracting authority to execute such licenses without prior approval from OCon&PPM.**

- If the desired social media provider is already listed on the Approved Social Media Provider List, the SI Social Media Participant must notify OPA and SIA by email of the proposed new social media account, including the name of the Social Media POC for that account, but prior approval is not required to establish an account with a provider that is already listed. In the event that the Smithsonian has negotiated terms of service with this social media provider, SIA shall contact the provider to add this new account to the negotiated terms of service.
- When notified of a proposed new social media provider or account, and the Social Media POC for that account, OPA will provide the Social Media POC with guidance, including the resources available on the SharePoint website to enable the Social Media POC to review best practices and collaborate with other SI Social Media Participants throughout the Institution. SIA will provide the SI Social Media POC with a link to the SI Web and New Media Listserv, to enable the Social Media POC to collaborate on matters related to social media at the Institution.
- SI Social Media Participants designated by their supervisor as a Social Media POC for specific social media accounts will be responsible for establishing, overseeing, maintaining, and closing the social media account for which that Social Media POC is responsible, and for providing the required notices to OPA and SIA.

Supervisors of SI Social Media Participants must ensure that the Social Media POC and all other SI Social Media Participants have reviewed this policy, the Approved Social Media Provider List and the SI Website and Social Network Registry maintained by SIA, and that they are familiar with, and able to identify, applicable content-based restrictions.

- SI Social Media Participants responsible for posting and maintaining content on social media accounts should obtain training on social media and related legal and policy issues offered by the Office of General Counsel (OGC) (<http://prism.si.edu/ogc/>), OPA and the SPO.
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B. Prior to Establishing an Account: Naming the Account.

- Only OPA is authorized to establish pan-institutional accounts in the sole name of the “Smithsonian Institution” or “Smithsonian” without reference to a particular SI unit.
  - Authorizing supervisors or SI unit directors, as SI unit policy determines, who establish an account on behalf of an SI unit must ensure that the account’s name and/or other identifying information clearly identifies the SI unit’s official name and, where appropriate, the Smithsonian sunburst. If inclusion of the SI unit’s official name or Smithsonian sunburst is not feasible depending on the platform (e.g., Twitter), a link to the SI unit’s website is acceptable. If the name will incorporate the Smithsonian’s name and sunburst logo, it must comply with the Visual Identity Program, SD 104, unless OPA approves a variation.
  - Any program or activity that establishes an account must make its affiliation to the Smithsonian clear either through use of the program or activity’s official Smithsonian name and/or the Smithsonian sunburst, where appropriate and feasible, depending on the platform. If inclusion of the program or activity’s full name or Smithsonian logo is not possible, a link is acceptable. If the name will incorporate the Smithsonian’s name and sunburst logo, it must comply with the Visual Identity Program, SD 104, unless OPA approves a variation.
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C. Setting up the Account:

- The account should be set up as an institutional account in the name of the SI unit, as appropriate (see section B above), except:
  - If the site only permits individual accounts rather than institutional accounts: an account may be opened by individuals acting in their official capacity, using a Smithsonian-provided “outlook resource account” (i.e., [help@si.edu](mailto:help@si.edu)), and using Smithsonian computers; such accounts will be deemed institutional accounts.

- For Facebook pages, where the site prohibits an individual from opening more than one profile, approved SI Social Media Participants may use their personal Facebook profile as an administrator for an official Smithsonian page.
- SI unit directors or their designees may approve Twitter accounts set up in the name of specific employees or mascots (e.g., <http://twitter.com/suethetrex>) rather than the name of the SI unit; however, official accounts in the name of individual employees are generally discouraged.
- If the site does not permit staff to sign in or register using a Smithsonian-provided “outlook resource account,” but instead requires registration and sign-in using a specific social media account [e.g., Flickr only permits log-ins using a yahoo account ([name@yahoo.com](mailto:name@yahoo.com)), google account ([name@gmail.com](mailto:name@gmail.com)) or a Facebook account], before opening the social media account that the SI Social Media Participant will use to log in or register with the social media platform, the Social Media Participant should contact OCon&PPM and the SPO for review and approval of the Terms and Conditions and Privacy Policy for that social media account. This is important because the social media account (e.g., gmail.com or Facebook) may be subject to different rules than the social media platform (e.g., Flickr). If OCon&PPM and the SPO approve the provider’s terms, conditions and privacy policy, the SI Social Media Participant, acting in his or her official capacity and using Smithsonian computers, may open an account; such accounts will be deemed institutional accounts.
- The social media account and SI unit websites should link to each other to guide people to resources and information available on the SI unit’s website and reinforce the official nature of the account.
- If the social media site has multiple SI units participating, and cross-linking is an available feature on the site, good-faith efforts should be made to cross-link with other related SI units.
- Social media accounts must link either directly to the Smithsonian’s terms of use and privacy policy on [www.si.edu](http://www.si.edu) or to the SI unit’s main website, which in turn must link to the Smithsonian’s terms of use and privacy policy, if the social media site permits such links. If the social media provider does not allow posting of, or linking to, the Smithsonian’s privacy policy and terms of use, the SI unit must contact the SPO for further guidance. The SPO, in coordination with OCon&PPM, will determine whether the social media provider’s terms

of use and privacy policies are consistent with the Smithsonian's policies and that the user is aware of the policies applicable to the specific site.

- The following comment policy should be posted directly on all third-party social media accounts or, if a particular site does not allow direct posting, the social media site must link to the terms of use at <http://www.si.edu/Termsfuse>:

Be aware that [NAME OF WEBSITE] is a third-party website with its own terms of use and privacy policy. The Smithsonian does not control [NAME OF WEBSITE]'s collection, use, or dissemination of information. To protect your privacy and the privacy of others, do not include any personally identifiable information that you do not wish to be made available to the general public. In addition, the Smithsonian may archive materials posted on this website pursuant to its document retention policies. By posting content, you are giving the Smithsonian and those authorized by the Smithsonian permission to use or modify it for any educational, promotional, or other standard museum purpose, in media of all kinds whether now known or later developed. Any data that users post on this site or that the Smithsonian collects from this site is subject to our terms of use and privacy policies which can be found at: <http://www.si.edu/termsfuse/> and <http://www.si.edu/privacy/>. The Smithsonian also monitors posts on [NAME OF WEBSITE] consistent with its policy at <http://si.edu/Termsfuse#/user-gen>, and reserves the right to remove content in accordance with its Terms of Use.

- If the standard terms and conditions or privacy policy that apply to a particular social media site are not sufficient to cover the terms and conditions of use of the Smithsonian's content on that site, the SI unit should, in conjunction with OGC and SPO, as appropriate, develop supplemental rules.
- To open an account that requires payment, a unit may use a purchase card, purchase order, or requisition, as appropriate based on payment terms and applicable delegations of authority. If the SI unit needs assistance with determining how to pay for the account, contact OCon&PPM.
- Personal credit cards must not be used to open accounts, and any account opened with a personal credit card must not use the Smithsonian name, logo, content, or email address. This restriction does not apply to units that do not use Smithsonian purchase cards.

#### D. Archiving the Account

- Social media accounts maintained by the Smithsonian may be crawled or copied, in whole or in part, by SIA for permanent retention and preservation subject to policies established by SIA.
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#### E. Closing or Abandoning an Account

- Accounts that are no longer intended to be used should be closed by the Social Media POC for that social media account and the user community should be notified, as appropriate, of the termination of the social media site;
  - Inactive accounts not used regularly for a year or more should be closed by the Social Media POC for that account or, if not, by the Social Media POC's supervisor, unless there is a reasonable basis to maintain the account for use at a later time;
  - Before closing or abandoning a social media account, the Social Media POC shall notify SIA and OPA;
  - Before closing an account, the Social Media POC shall work with SIA to archive or delete the content, as required by policies established by SIA;
  - All registered domain names must be held for 10 years in accordance with SD 950, Management of the Smithsonian Web.
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