We want to hear from you! National Archives staff, please tell us what you think about this draft of our new social media strategy. Our first stage is to incorporate feedback from our staff. Next, we will ask other cultural institutions to provide their suggestions. Finally, we will welcome comments from the public and update the strategy as a living document.

## Introduction

The National Archives was founded in 1934 to preserve the records of the Federal Government and make them available to its citizens. Since then, we have grown to include 13 Presidential libraries and museums, multiple archival facilities, and educational centers located across the country. We reach millions of visitors and researchers each year at these locations.

In 2009, we launched our first blog as a pilot project to build a community and increase transparency in the Federal Government. Soon after, the National Archives established a presence on Flickr, YouTube, and Facebook. In 2010, we introduced our <u>first social media strategy</u> to continue our commitment to open government and empower staff to use social media.

Six years later, the landscape of digital media has evolved and grown. Our digital presence reaches hundreds of millions of people. More than 200 National Archives staff actively contribute to <u>130 social media accounts</u> on 14 different platforms, generating over 250 million views in 2015.

Access and transparency are at the core of our work. With the explosion of digital choices, audience needs have changed and their criteria for following cultural organizations has matured. We need to provide exceptional content to stand out—even if it means reaching beyond our comfort zone and trying new approaches.

As we continue to digitize more of our holdings, we have more stories to share. We also want to tell our audiences about the work of our diverse staff and the stories they find. Our staff need an updated social media strategy that guides decision-making and focuses our energies and resources so that we can make a bigger impact and more deeply engage people online. This updated strategy also aims to create more opportunities for different levels of staff participation so that we can have greater coordination and impact in the stories that we share.

This new strategy document looks toward the next three years (FY 2017–2020) and will evolve over time. It is intended to serve our staff and help them create digital content that engages, delights, and illuminates.

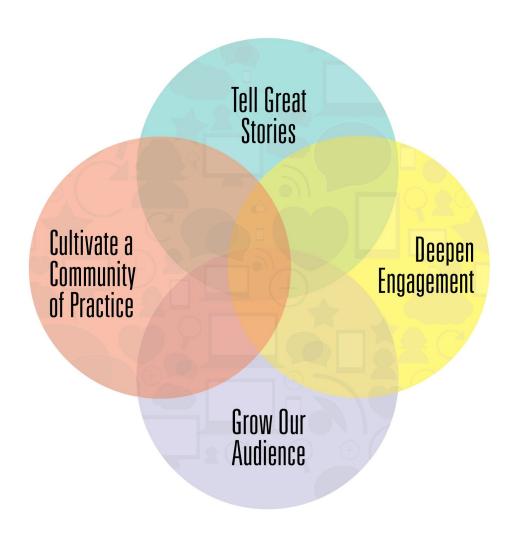
# Vision

The National Archives uses social media platforms to tell great stories; we connect more deeply with our audiences through conversation; we reach a wider audience and provide more opportunities for civic engagement; and we help our staff succeed by developing an employee culture that values and invests in social media skills. Data is a critical tool for understanding audience needs, and we use it to reflect on projects and guide decision-making.

# Goals

This strategy consists of four goals, each with its own initiatives and action steps:

- 1. Tell Great Stories
- 2. <u>Deepen Engagement</u>
- 3. Grow Our Audience
- 4. Cultivate a Community of Practice



#### Goal 1: Tell Great Stories

Every document in our holdings is an opportunity for great storytelling. We find and choose stories that resonate with our audiences, make emotional connections, and increase understanding of our shared history. We reflect on what makes stories successful so that we have a clear understanding of our message and we know what our audiences respond to. Our audience recognizes our brand and voice, and feels an emotional connection to our stories: they want to follow us because of who we are and what we do.

1.1 **Support staff storytelling.** A dedicated social strategy and production team ("the team") provides direction and coordination for effective messaging. This team works to bring staff ideas to life through research, development, design, production, project coordination, and partnerships. See 4.1 for more information about the creation of the team and the skillsets and tasks required to support a social media community across the agency.

Action: The team coaches staff content creators in how to use the content strategy to craft great stories and set success metrics that illuminate audience interests through data.

Action: The team creates a Digital Plan for all projects. The Digital Plan template functions as a checklist of best practices and is also a capsule strategy to guide each campaign and project. The project/content owner and the team collaborate on the plan. The framework helps content creators set goals and strategies, show evidence of success, and reflect on lessons learned post-project.

Action: The team coordinates the logistics for different levels of staff involvement that minimize the labor-intensive nature of social media account management. Greater staff participation is encouraged through scalable roles. In some cases the role could be managing an account full-time; in others, it could be short-term, project-based participation, or as a content provider.

Action: The team establishes and leads a Social Media Idea Lab to support NARA staff in honing their social media skills. It will include four areas of specialization:

Data Lab	The goal of the Data Lab is to foster smart and creative uses of our social media data through insights into what content performs well with audiences and why.
	<ul> <li>The team establishes a weekly workshop for content creators across NARA to get hands-on experience in social media data analysis.</li> </ul>

	<ul> <li>Content creators use the workshops each week to track audience engagement with their posts, channels, and campaigns. They learn to use analytics tools and understand the trends that result from their published content.</li> <li>In the spirit of open data, the team summarizes and shares these data trends with staff and the public on a weekly basis using a social media data dashboard.</li> <li>Content creators use this information to design campaigns and posts.</li> </ul>
Idea Lab	The team works with staff to develop new ideas into actual projects by helping with  • brainstorming  • platform selection  • editorial assistance  • visual design guidance  • and technology research.  The team connects staff with the resources (designer, developer, editors) they need to turn an idea into a reality.
Technology Lending Library	The team works with Business Support Services to maintain and loan out equipment—such as scanners, cameras, and handheld devices—to increase staff participation in social media.
Learning Library	The team creates and maintains tip sheets on best practices—templates, models, examples, and studies—so that content creators don't need to start projects from scratch.  As a result, content creators have a shared knowledge about the best ways to plan, develop, and evaluate content for maximum impact.

#### 1.2 Define a content strategy for the National Archives.

Action: The team works with social media content creators to create an agency-wide content strategy that outlines the goals, objectives, defined measures of success, timeline, partners, and post-production reflection.

Action: Staff use the content strategy as a guide to create everyday posts, special campaigns, and longer-term editorial plans.

1.3 **Focus on quality and impact over quantity.** We excel in the venues that we choose to participate in and reevaluate the projects that don't meet our needs. We recognize that social media success is labor intensive. We want staff to have time and resources to engage with projects that make the most impact with our audiences. Making the best use of staff time means making hard choices about what *not* to do.

Action: The team helps content creators focus on a small number of projects. Content creators focus on depth and quality and move away from the current emphasis on quantity, sometimes using fewer platforms and posting less. Content creators are able to say no to projects that take time but have little impact.

Action: The team procures and maintains a Social Media Analytics Dashboard for staff that visualizes social media metrics, giving content creators feedback and concrete data on what is working and what is not. Data is available to all content creators so that they can make strategic decisions about platforms to add or remove. To encourage open data and transparency, the dashboard can be viewed by the public.

Action: Content creators use analytics to evaluate the performance of our posts. We create content that is successful and avoid content that does not perform well.

Action: Our curators select records for an exhibit to give visitors the best experience in a museum, and we apply this approach to our social media platforms. The team plans workshops led by NARA curators on how they select, edit, and plan exhibits that draw audiences in.

1.4 We create exceptional content that uses the latest technology and has a consistent visual identity. Our content is professionally designed and reflects our status as a world-class cultural institution. As a visual medium, social media must be sophisticated and eye-catching. All National Archives social media content meets visual design standards that reinforce our brand and match the expectations of today's image-based social platforms.

Action: The team makes style guides, tip sheets, tutorials, and templates available to all staff so that they can can write well-crafted stories and create high-quality images and other multimedia formats.

Action: Members of the team have professional graphic design and video production skills so that they can help content creators create and maintain a strong visual identity. The team produces graphics, interactive tools like quizzes, and video shorts that can be embedded in social media platforms.

Action: The team creates a workflow that makes it easy for content creators to work with designers.

Action: The team creates or helps provide templates and tools for content creators to use to make graphics according to our brand-aligned designs.

#### Data in Action

Data plays a critical role in helping NARA create social media content that is responsive to its audiences. We use data in various ways to help us tell great stories.

- After each project, content creators collect metrics, draft insights, and make recommendations.
  - Reach: How many people saw our content? How did they find us? On what platforms? What devices did they use?
  - Audience: Who did we reach? Is it the intended audience? Are they new or repeat audiences? What attracted them? How can we convert them to deeper levels of engagement?
  - Engagement: What actions did people take? Did they comment, share, like, reply? What kinds of comments did we get? What is the sentiment of the reaction?
- Weekly: The team uses an analytics tool to measure stats on our most popular posts and shares them via the Declarations staff blog in a Friday roundup.
- Monthly: The team hosts sessions for content creators to look at social media successes and lessons learned.
- Quarterly: The team helps content creators review data from each platform to see if our
  efforts are reaching and engaging the intended audiences. We discuss what is and isn't
  working, and use the content strategy to help close out platforms or change direction.
- Annually: The team holds a year-in-review "retreat" using Google Hangouts. Content creators volunteer to give a three-minute talk about a success (or failure) on a platform.

#### Strategy in Action

## Goal 2: Deepen Engagement

Our mission is to make access happen. In the broadest sense, we want people to see and experience our holdings—whether they are in a research room, in an exhibit space, or on a computer—and then share these stories with others. Rather than just publishing content, we want to hear from our audiences and deepen our relationships with them through feedback and conversation. We want our curious visitors to connect with the stories in our holdings and become loyal, enthusiastic advocates for the work of the National Archives. We want to engage our audiences through exciting, low-barrier opportunities to be a part of our mission and do meaningful work on behalf of their country and fellow citizens.

#### 2.1 Coordinate agency-wide campaigns for maximum engagement.

Action: Our campaigns have compelling calls to action that drive engagement. Content creators choose topics and content that audiences want to talk about and share.

Action: Staff take time to plan and develop campaigns. Staff schedule time to create great content, build useful partnerships, engage with audiences throughout the campaign, and analyze data after the launch to provide future recommendations.

Action: The team works with content creators to select the best platforms for each campaign and use them to connect with target audiences.

Action: The team establishes and maintains an internal quarterly editorial calendar for the agency to generate engagement ideas and define goals, messaging, and timelines. Content creators use the calendar to plan projects and determine the amount of time and coordination needed.

# 2.2 Leverage partners and influencers who encourage their audiences to engage with us. The team researches, forms, and develops partnerships with people and organizations to help spread the word about our campaigns. The team uses these partnerships to learn more about

spread the word about our campaigns. The team uses these partnerships to learn more about our audiences and their needs.

Action: Ask our partners and our audiences what they want. The team helps develop partnerships with organizations and influencers (power users on social platforms) to learn what our audiences want so that our combined campaign efforts make a greater impact. For each major social campaign, content creators have at least one official partnership and reach out to at least one influencer.

Action: The team creates social media tool kits that share the campaign calls to action, and we share these kits with our partners and influencers.

Action: Content creators research influencers and reach out to them through Instameets, Tweetups, and special behind-the-scenes opportunities like tours and demonstrations so that they are inspired to tell stories from our holdings to their audience.

Action: The team have a planned, cohesive outreach campaign on social media for the annual Virtual Genealogy Fair. Using analytics, the team looks for new places where our audiences might be. The team reaches out to Ancestry and other genealogy organizations, and at least three power-users on Twitter.

2.3 **Use crowdsourcing to drive participation in our mission.** The team creates crowdsourcing opportunities for audiences to contribute their skills and experiences to our mission.

Action: Social media posts include calls to action as a way to participate in the story, whether by sharing, commenting, or transcribing.

Action: The National Archives offers participatory opportunities on social media that can't be found elsewhere. For example, we partner with Mount Vernon on July 4 to transcribe documents written by George Washington.

Action: Content creators build connections with schools and youth groups to encourage them to participate in crowdsourcing events.

Action: National Archives locations promote crowdsourcing to on-site visitors in our physical spaces. We set two of the computers in the Boeing Learning Lab to be signed in to a general account so that visitors can easily transcribe documents on site. We have printed pieces that visitors can take home to encourage them to visit the Citizen Archivist dashboard.

2.4 **Create new ways to discover and share latest stories.** The team creates a flagship news feed on the National Archives website that pulls in posts from our social media channels. Audiences can choose and curate stories from this entertaining up-to-date news stream.

Action: The team coordinates development or procurement of a tool for aggregating and displaying social media on our websites. We track social media and web data on the most popular topics that audiences respond to on our digital publications. We use these topics to establish filtered categories that audiences can personalize and subscribe to.

Action: The team brainstorms new ways to leverage social media content. For example, we pilot a new monthly email newsletter featuring interesting content for an audience that prefers recaps and email.

Action: The team invites audiences to help curate content for social media platforms. For example, we develop a mechanism for the public to help find and select items for Today's Document. We will also invite influencers and individuals from our audiences to guest edit a social media campaign.

#### **Data in Action**

Data plays a critical role in helping NARA connect with customers and encourage greater participation in our mission.

- Content creators define measures of success at the start of each project to help us understand how our content performs and make improvements. These include comments, user-contributed images, transcriptions, and questions asked and answered.
- Content creators use a Digital Plan before and after the project to plan for and measure success. The plan and report help align objectives and tactics and help us assess what worked and what didn't. This data informs how we build success over time.

#### Strategy in Action

#### Goal 3: Grow Our Audience

We reach more people, and diversify our audiences, by being present on popular platforms and publishing content that people feel compelled to share with their networks. We develop relationships with influencers and partners to reach more people in meaningful ways.

3.1 **Inspire people to share.** Staff reach the largest possible audience by inspiring people to talk about the stories in our holdings. Our staff are stewards to the history of democracy, our American government, and its citizens. Our documents inspire emotional responses that lead to social sharing.

Action: The teams focuses on becoming a leader in the GLAM community by creating a space on Archives.gov that serves as a resource for hashtags and other social trends for other cultural heritage institutions.

Action: The team addresses our photo policies within our public spaces. We need to improve our services, like wifi, to encourage digital sharing while visitors are in our physical spaces.

Action: The team defines a strategy for choosing hashtags that encourage personal connections and social sharing.

Action: The team uses reference desk statistics from across the National Archives to compile data on the most-requested items in our holdings. We feature these documents on social media to extend their reach to audiences who cannot visit in person.

Action: The team ensures that web content is easy to share on popular platforms with simple tools and buttons.

Action: Content creators connect with local communities to bring people physically to NARA locations through in-person events like Instameets, Tweet Ups, and Wikipedia edit-a-thons.

Action: We build on the expertise of our content creators who are successfully using social media to drive physical traffic to public programs. The team establishes a working group for these content creators to:

- pilot techniques to support and measure conversion of web-to-physical visits to our locations;
- think creatively about how NARA can encourage greater sharing of in-person visits via social media; and

- explore tactics like promoting hashtags on-site and in exhibit labels, provide screens that display geotagged images from visitors, and optimizing specific tools like Instagram, Twitter, Yelp, and more.
- 3.2 **Target messaging to specific audiences and platforms.** Staff understand our audiences and go where those audiences are. We have compelling messaging across different formats so that our communications are targeted to the specific needs of each audience and platform.

Action: Content creators focus efforts on connecting with key audiences that are particularly active on social media and offer growth potential, including educators, history buffs, curious nerds, museum visitors, and genealogists.

Audience	Who are they and why are they are important for NARA on social media?
Educators	Teachers and educators have a built-in need and interest in our records and already lead discussions on our topics. They are a friendly group that is open to a creative use of our content, and they connect us to a younger audience.
History Buffs	History buffs are already interested in the topics of our records, and enthusiastically share us with their social networks. This group likes to engage in dialogue with us and like to comment and share what they already know. This is the group that could turn into citizen archivists and super advocates.
Curious Nerds	Curious nerds are social media power users who are influencers with a wide range of interests. They increase our visibility, and when given the opportunity to deepen their engagement, they are likely to share our content.
Museum Visitors	Museum visitors are our captive audience: they're already inside our doors! They come here and have personal, in-depth experiences, but they are often distracted and busy while in the exhibit spaces. They are also prohibited from taking pictures in our exhibit spaces, which discourages social sharing.
Genealogist s	Genealogists are tied directly to us through their prolific use of our content and records. They have a personal, family-based connection to us, and they care about us. They are a close-knit audience that mostly talk to each other, but they are a very large audience group.

Action: Staff use analytics, user personas, and other user experience tools to better understand our audiences and their use patterns.

Action: Staff choose the best platforms for each post and do not inundate our audiences across platforms. We tailor each post to the platform and to the audience we intend to connect with. We reflect on our performance on various platforms.

3.3 **Connect social media to news and trends.** The team studies trending news, hashtags, platforms, and current events and uses that information to determine what's happening in the world that we can connect with—and what platform to connect on.

Action: The team looks for ways to tie our records to current issues. The team helps NARA locations host in-person events for local audiences centered on using our records in social media to inform modern dialogues about current events.

Action: The team supports the agency's overall communications goals with social media outreach tactics. We meet regularly with colleagues in the Office of Public and Media Communications to find out what is coming up and how we can help public affairs specialists tell stories on social media.

Action: The team works with the Office of Public and Media Communications to pitch traditional and news media on our social stories and campaigns. Public affairs specialists advise on what social content and campaigns interest traditional media outlets, and we ask them to pitch our campaigns to them. We create social media press kits that are built into the traditional press kits. We ask the Office of Public and Media Communications to pitch our social campaigns to social publications like Buzzfeed, Mashable, and TechCrunch.

Action: The team meet regularly with our Employee Communications staff to look for stories and give staff who aren't on social media a new way to reach us with their stories.

Action: The team creates a Trend Team that keeps us up to date on the latest trends related to history, cultural organizations, government, and social media usage. The team includes staff with expertise in social media, marketing and communications, and technology. The team invites external experts to speak to staff about trends and hosts conversations with staff to generate ideas on the ICN.

Action: We add and prune platforms and tactics based on our research of external trends.

3.4 **Strategically boost our efforts with paid media.** We selectively use paid advertising to reach new audiences.

Action: We budget for, plan, use, and analyze regular paid posting on Instagram, Twitter, and Facebook. This might include promoted posts, hashtags, and accounts.

Action: We partner with National Archives Foundation to coordinate the use of paid advertising to increase our reach to new audiences and to create splashy campaigns that the media want to cover.

#### Data in Action

Information about our audiences and their behaviors helps us to connect with customers and give them the content they want.

- Staff use analytics to study our audience's behaviors and inform choices for platform and content. This data also feeds into our use of user personas and understanding of the digital user experience.
- Staff use campaign URLs, hashtags, and tools (such as Google Analytics Campaigns) to track clicks and engagement with our content, including referrals to our website. This information helps us better understand the digital customer journey.
- Staff track audience engagement metrics (such as comments, shares, replies, use of hashtags) for every platform and examine the data for our most and least successful posts so that we understand and can build on audience preferences.
- The Digital Plan includes an easy-to-use worksheet for content creators to use to identify
  and track success measurements for their projects and posts. Staff share these
  worksheets on the ICN where everyone can use their experiences to improve their own
  campaigns and postings.

#### Strategy in Action

## Goal 4: Cultivate a Community of Practice

Our social strategy and production team serves as a community manager and an internal resource for staff. We help our staff across the nation become a cohesive community that seizes opportunities to develop special media skill sets and works together to make the biggest impact.

4.1 **Create a social strategy and production team.** The social strategy and production team has a well-supported staff who specialize in ongoing development and innovation in social media.

Action: We assemble a team that can focus, provide direction for, and support the agency's social media needs. Managers and supervisors assign tasks and provide direction and guidance for the cross-departmental team. Putting together the right team will require identifying staff members, developing skillsets, and providing a structure for the group to operate within.

Action: We define and refine task areas that support the professional development of NARA staff in social media management. Members of the team will take leadership roles in serving and providing training in the following areas.

Task Area/Skillset	Responsibilities
Strategic Planning	Identify long- and short-term goals and tactics to achieve success and growth.
Content Creation	Research and write content, including choosing images.
Editorial Services	Offer services to improve written copy and provide training to improve staff storytelling skills.
Graphics and Video Production	Develop style guides, templates, and tools as well as offer production services.
Campaign Planning	Connect offices with each other to better coordinate across the agency and create strong flagship campaigns that NARA owns and other organizations join us in.
Community Management	Regularly communicate and facilitate collaboration with social media practitioners across the agency.
Communications	Connect with influencers and increase visibility of social media.

Platform Review	Facilitate regular reviews of platforms and accounts to evaluate how projects can be strengthened, supported, or retired.	
Training and Coaching	Arrange staff training workshops, make contacts with external organizations, run workshops and field trips, and figure out ways to connect staff.	
NARAtions blog	Write or otherwise coordinate posts that provide how-to guidance, share lessons learned, and offer models for staff.	
Social Media Idea Lab  Physical and virtual space that allows for the sharing of new ideas, collaboration on tools, researching technology, and developing best practices		
Data	Administer analytics tools, develop actionable insights from data, share reports, and conduct training.	
Ideas	Enable the development of new ideas into actual projects and experiments, including brainstorming, platform selection, editorial assistance, visual design guidance, and technology research.	
Lending	Maintain and loan out technology, resources, and equipment to increase staff participation in social media.	
Learning	Develop best practices, tools, and templates for content creators to reuse as well as maintain a virtual space for ideas that inspire.	

4.2 **Provide opportunities to develop and innovate together.** We work with staff to create a vibrant culture of social media innovation, collaboration, educational opportunities, and partnerships. The team provides staff the training and skills necessary to succeed, and we support staff efforts with our collective resources and expertise. We share successes, learn from each other, and work together to innovate.

Action: The team creates guidelines that are easy to use, meaningful, and address real-life issues that social media managers are experiencing. We use infographics, checklists, and tip sheets to make these best practices appealing and easy to use.

Action: The team uses NARAtions as a digital training blog, making it both a place for analysis of our digital engagement and a training guide and repository for staff experiences. The blog features guidance, shares lessons learned, and offers models of

social media success. We use NARAtions as place to share innovative ideas and report back on collaborations. The blog is available to NARA staff and the public.

Action: The team supports communication and collaboration with the social media community across NARA, leads two-way communication with staff with monthly educational sessions on various channels (like webinars, calls, and Google Hangouts), reaches out via an email newsletter, and uses space on the ICN to consolidate information. We ask staff for feedback and act on what they say.

Action: The team organizes lightning sessions and field trips for content creators to discuss and explore new ideas. We invite outside expertise to help us get inspired.

Action: We increase visibility (and show the importance of social media) with managers and supervisors by sharing success and highlighting staff in a monthly report that shares little successes like retweets from famous people, stakeholder reactions to current archival projects, and numbers of people downloading eBooks and attending Hub events.

4.3 **Give social media a seat at the planning table.** Across the National Archives, we incorporate social media into all initiatives from the beginning, not as an afterthought. Currently, social media development is requested toward the end of project timelines. This limits our ability to imagine and plan for larger social media impact, partnerships, and audience outreach. By incorporating social media into early phases of creative development, we build in time for quality, depth, and execution for both large initiatives and smaller projects.

Action: Each department with presence on social media (especially Exhibits, Education, and Public Programs) has a point of contact on the team.

Action: Every exhibition should have a social media strategy and a budget for paid social media placements.

4.4 **Make it easy for anyone to participate.** We make it easy for staff who don't usually work on social media—archivists or archives technicians, for instance—to share the stories of the fascinating documents they encounter while working or share their otherwise fascinating roles at NARA.

Action: We create and maintain technology, resources, and equipment to increase staff participation in social media.

Action: To simplify the process of involving staff who aren't content creators but come across interesting content in their daily work, we provide scanners in staff work areas. Staff can then instantly digitize and upload files to the catalog, which will provide fresh content on social media.

Action: Develop easy ways for staff to identify a story to share on social media, such as working with the team or the embedded "staff reporters" to go from interesting nugget of information to published social media post.

Action: A major hurdle in government social media is reliance on negotiated terms of service agreements. We work with NARA's General Counsel to address the roadblocks and troubleshoot ways to make sure we follow the law without stifling our creativity.

#### Data in Action

Data about campaigns, audiences, and past successes is critical for supporting the development of staff skillsets in social media.

 Content creators regularly participate in Data Lab workshops to get hands-on experience in social media data analysis and to evaluate the performance and trends of their published channels and content.

#### Strategy in Action

# Supporting Resources

NARA Digital Plan
 The Digital Plan worksheet will be coming soon. Here are some guiding principles to start

with.

One-page overview

### Sources

Our strategy was inspired and informed by the following models and articles.

- Warhol Digital Strategy\*
- Why You Need a Digital Plan for Success. NPR Social Media Desk
- NPR Training Blog
- How BuzzFeed Mastered Social Sharing to Become a Media Giant for a New Era. Wired
- NASA's Social Media Strategy is Genius -- and Kinda Maddening. Wired
- Digital Media at the Victoria & Albert blog
- <u>Digital Metrics Dashboard. Carnegie Museums</u>
- Experimenting with NPR's New Storytelling Lab. Columbia Journalism Review
- Guide to Crowdsourcing. Columbia Tow Center for Digital Journalism
- Is Your Social Network a Puppy or a Dog. Convince and Convert
- Content Marketing Strategy Lessons from BuzzFeed. Smart Insights
- How a Bunch of Government Space Geeks Won the Internet. Quartz
- BuzzFeed's Strategy. CDixon Blog

\*We were especially inspired by the work of the Carnegie Innovation Studio. Thank you for providing an open social media strategy model on GitHub and encouraging us to fork it!