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ADMINISTRATIVE PROCEDURES FOR ESTABLISHING SOCIAL MEDIA ACCOUNTS

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INTRODUCTION

This appendix describes the steps that must be followed in order to establish an Official Smithsonian Social Media Account. If questions arise about these procedures, please direct them to the Social Media Specialist in the Office of Public Affairs (OPA).

PHASE 1 — APPROVAL

- First, you must obtain the permission of your direct supervisor to confirm that you are authorized to spend official time on social media activities.
 - Only full-time Smithsonian staff or contractors who render services directly related to social media outreach are permitted to manage an Official Smithsonian Social Media Account. Interns and volunteers may help contribute to an account but all content must be reviewed and posted by a staff Social Media Manager.
 - Second, you must obtain approval to open an Official Social Media Account by your unit director or whoever the director has designated to be in charge of social media approval at your unit.
 - If you are unsure of who this is in your unit, contact your Office of Public Affairs. If your unit does not have an Office of Public Affairs, contact the Social Media Specialist in the Office of Public Affairs.
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PHASE 1 — APPROVAL (continued)

- Next, the social media platform must be approved for Smithsonian-wide use by the Office of Contracting and Personal Property Management (OCon&PPM) and the Privacy Office, and/or the Office of the Chief Information Officer's [Technical Review Board](#) (TRB). You should contact all three offices for review and approval of new social media platforms prior to opening an Official Smithsonian Social Media Account.
 - OCon&PPM maintains the [Smithsonian Institution Approved Social Media Providers List](#) for you to consult. Facebook, Twitter, Instagram, YouTube, Tumblr, Snapchat, Flickr are all pre-approved. If the platform is niche or emerging, it is likely not yet approved for use. If your desired social media platform is not on the [pre-approved list](#) available on the OCon&PPM Prism website, use the [OConHelp website](#) to start the approval process.

PHASE 2 — ACCOUNT EMAIL

- Next you must use a Smithsonian resource email account, not an individual staff member's email account, to set up an Official Social Media Account.
 - A resource account allows multiple people to have access to an email account. This ensures that access to an account stays with the Smithsonian in the event of your departure. If the login and password information is lost when you leave, colleagues will still be able to recover login information by having password reset links sent to the resource email account.

PHASE 3 — LINKS TO si.edu WEBSITES

- When creating the Official Smithsonian Social Media Account, please ensure that it links back to your unit's homepage, or the URL that gives the most appropriate overview of your unit or program.
- All Official Smithsonian Social Media Accounts must also contain links to our Terms of Use language: www.si.edu/Termsfuse. The best place to do this in in the bio or about section.

PHASE 4 — PAYMENT FOR SOCIAL MEDIA SITES

- If a site requires payment for membership, you are allowed to use a Smithsonian purchase card, purchase order or requisition. You may NOT use a personal credit cards to pay for membership. Please refer to [SD 323, Use of Funds Handbook](#) for guidance on the use of Smithsonian funds to support advertising, marketing, and public relations activities, including social media.
- If you need help with this, please contact OCon&PPM at <https://si-jira.si.edu/plugins/servlet/desk/portal/1>.

Special Conditions for Facebook and Google

- You may only create a Facebook Page, not Profile, for Official Smithsonian Social Media Accounts. Per Facebook’s policy, Profiles are for people, Pages are for organizations.
- All Facebook Pages must be administered by a Facebook Profile. You are allowed to use your personal Facebook Profile to set up a Smithsonian Page.
- All Smithsonian Facebook Pages must have a minimum of two administrators who are permanent and current Smithsonian staff.
- Google platforms like YouTube often require a Gmail account to register. You are allowed to create a Gmail account to administer the page, but you must add a Smithsonian resource account as the backup email on the Gmail account.

PHASE 5 — ACCOUNT NAMING, DESCRIPTION, AND PHOTO

- Naming: Only the central Office of Public Affairs can establish accounts with the sole user name “Smithsonian Institution” or “Smithsonian” without reference to a particular Smithsonian unit or program. Your account name must clearly identify your unit or program name as best as possible within the constraints of the platform.
- Bio/description: You must identify your affiliation with the Smithsonian as best as possible within the constraints of the platform. Most platforms offer a short bio section where you can identify your affiliation with the Smithsonian and briefly introduce your unit or program to the public.

PHASE 5 — ACCOUNT NAMING, DESCRIPTION, AND PHOTO (continued)

- Profile photo: Strongly consider using an image other than the sunburst logo for your profile photo or avatar. The Smithsonian has more than 500 social media accounts, and with so many, the identical visual identity does not allow the public to understand how multi-faceted we are. Select an image that is attractive and unique to your unit.

PHASE 6 — ACCOUNT LAUNCH

- Once the account is ready, you must notify an Archivist in the Smithsonian Institution Archives (SIA) so that the account can be added to the central registry. SIA crawls and copies Official Smithsonian Social Media Accounts for permanent retention and preservation of the Smithsonian's operations.
- You must also notify the Social Media Specialist in OPA of your new account. OPA ensures that central Official Smithsonian Social Media Accounts are following the newly created account. OPA can help promote the new account and grow its audience by sharing its content with "big brand" Smithsonian account followers. The new account will also be added to the Social Media Listserv.
- Official Smithsonian Social Media Accounts that are inactive for more than a year should be closed unless there is a reasonable basis to keep the account open for a later time. Before closing an account please notify SIA and OPA.

SUPERSEDES:	SD 814, Appendix A, issued on August 10, 2011.
INQUIRIES:	Office of Communications and External Affairs (OCEA).
RETENTION:	Indefinite. Subject to review for currency 36 months from date of issue.
