![Metro logo]

Social Media:

Manage risks and increase engagement

January 2018
A Report by the Office of the Auditor

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Knighton Award
for Auditing

Audit receives recognition

The Office of the Metro Auditor was the recipient of the "Distinguished Award" for Small Shops by Association of Local Government Auditors (ALGA). The winning audit is entitled "Community Planning and Development Grants: Performance measures and stronger controls needed to ensure results." Auditors were presented with the award at the ALGA conference in Atlanta, Georgia in May 2017. Knighton Award winners are selected each year by a judging panel of peers and awards are presented at the annual conference.

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MEMORANDUM

January 10, 2018

To: Tom Hughes, Council President
Shirley Craddick, Councilor, District 1
Carlotta Collette, Councilor, District 2
Craig Dirksen, Councilor, District 3
Kathryn Harrington, Councilor, District 4
Sam Chase, Councilor, District 5
Bob Stacey, Councilor, District 6

From: Brian Evans, Metro Auditor *BE*

Re: Audit of Social Media

This report covers the audit of social media usage. The growing number of people who use social media allows governments to connect with more people in more ways. The purpose of this audit was to determine if Metro was managing social media risks effectively and using it to achieve its communication goals. The audit was included in the FY2016-17 Audit Schedule.

We found that stronger management of social media was needed to address risks. Social media brings inherent risk to any organization, and because it is constantly evolving, it can be difficult to stay current with the latest trends and features. An underlying cause was unclear responsibility for security and training. More guidance was also needed to help employees respond to comments and address the challenges that social media presents for public records law.

We also found Metro could do more to engage and develop new audiences through social media. Social media was being used to inform (provide information) more than it was being used to engage the public (get information back). Targeting audiences more broadly through paid advertising could help Metro find people on Facebook with whom it would not otherwise connect. Collaborating internally and externally could help inform its strategy, and create new ideas for social media use.

We have discussed our findings and recommendations with Scott Robinson, Deputy COO; Scott Cruickshank, General Manager of Visitor Venues; Jim Middaugh, Communication Director; and Rachel Coe, Information Services Director. A formal follow-up to this audit will be scheduled within three years. We would like to acknowledge and thank all of the management and staff who assisted us in completing this audit.

Summary

Social media presents risks and opportunities to any organization. The growing number of people who use social media gives governments and businesses a good reason to use it.

The purpose of this audit was to determine if Metro was managing social media risks effectively and using it to achieve its communication goals. We found Metro could manage risks more effectively by:

- Controlling access
- Addressing challenges social media presents to public records requirements
- Clarifying expectations for monitoring and responding to comments
- Training employees

Opportunities existed to increase engagement and develop new audiences through social media. The Metro Regional Center Social Media group (MRC Group) was using social media more to inform (provide information) than engage (get information back). This use of social media was driven by Metro's Communications strategy. The primary goal of that strategy was to increase awareness of Metro.

We found these priorities reflected in MRC's Facebook ads. Over two-thirds of ad campaigns we analyzed provided the community with information. Less than one-third of campaigns sought information from the community. We focused on Facebook because it was used by most parts of the organization and was the most popular platform among American internet users.

Public engagement was a priority for the agency. Metro may not meet its engagement goal via social media if representative voices are not heard. People who "liked" MRC's Facebook page did not reflect the regional population. MRC also took a narrow approach to targeting audiences on Facebook. Targeting broadly can help governments find new audiences that they would otherwise be unaware of.

We found more collaboration was needed to help MRC make use of the opportunities social media can provide. The dynamic nature of these tools makes it difficult to stay current with the latest trends and features. Broader perspectives would ensure all parts of Metro have a chance to be represented on social media, and allow the organization to learn from internal and external experts to inform its strategy.

Our recommendations focused on assigning responsibility, developing policies and procedures, increasing two-way communication, broadening audiences, and collaborating internally and externally.

Background

Social media is loosely defined as a set of technologies with community and social dimensions. It is interactive, dynamic, and collaborative. Social media includes networks (Facebook), blogs, and micro blogs (Twitter). It features content such as photos and videos (Flickr and YouTube). It also includes podcasts, wikis, email lists, and message boards. Social media are openly accessible, and used by individuals and organizations alike.

Social media can help governments connect with more people in more ways. It can increase community feedback and engagement. It can also enhance customer interaction, increase brand recognition, and improve employee recruitment. The growing number of people who use social media gives governments and businesses a good reason to use it.

This audit focused on Metro's use of Facebook. We chose Facebook because it was used by most parts of the organization and remains the most popular platform. A national survey found that, of the Americans who used the internet, nearly eight-in-ten (79%) used Facebook, more than double the share that uses Twitter, Pinterest, Instagram, or LinkedIn. That means 68% of all U.S. adults are Facebook users. The share of online adults who reported using Facebook increased by seven percent from 2015. Young adults continue to report using Facebook at high rates, but older adults are joining in increasing numbers. And, women continue to use Facebook at higher rates than men.

Exhibit 1   **Facebook is the most popular social media platform among American internet users**
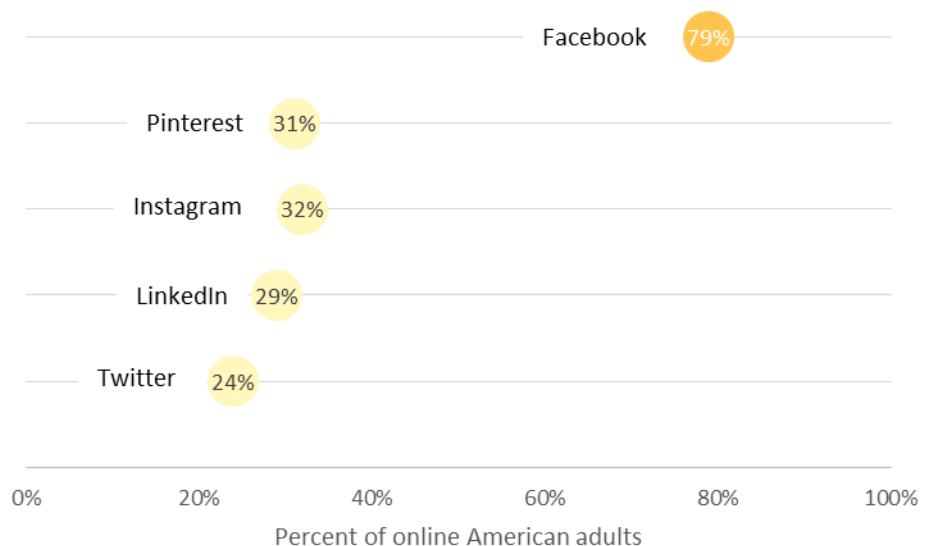
Source: Pew Research Center (2016)

Time spent on social media has also grown, with heavy users spending over three hours per day. The increase in devices and channels has led to an increase in overall time spent on media among consumers. The share of total media time spent on social media varies by demographic.

Metro used many platforms, including those designed for general content sharing (social networking), as well as sharing images and videos. Facebook and Twitter were the most common. Oregon Zoo used more platforms than any area of the organization.

Exhibit 2   Metro mostly used social networking platforms

Type	Platform	Metro Regional Center	Portland Expo Center	Oregon Convention Center	Oregon Zoo	Portland'5 Centers for the Arts
Social networking	Facebook	✔	✔	✔	✔	✔
	Twitter	✔	✔	✔	✔	✔
Photo & video sharing	Instagram	✔		✔	✔	
	YouTube			✔	✔	✔
	Pinterest			✔	✔	
	Flickr	✔		✔		
	Snapchat				✔	
	Vimeo	✔				
	Vine				✔	

Source: Metro Auditor's Office summary of active social media profiles listed by Communications staff as of January 24, 2017
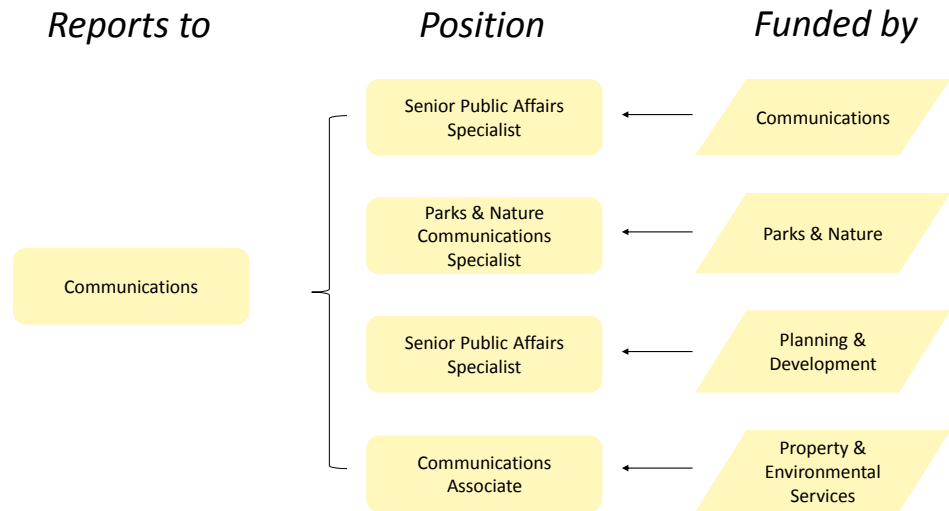
Parts of Metro also appeared on social media sites like Yelp, where their presence could be established by customers, instead of employees acting on behalf of the agency. Sites like this consist of user-generated content, like photos and reviews. Some Metro venues had claimed their presence on Yelp, which allowed them to provide additional information, such as business hours, and communicate with customers.

Metro used a combination of internal and external resources to staff social media. At least 10 current employees, or about two FTE, had used social media for Metro business. For most, it was a small part of their jobs. Some parts of Metro's social media presence were managed separately, while others were managed together. For example, each venue managed their own social media profiles. Metro Regional Center profiles were managed by the MRC Social Media Group (MRC Group).

Most of the information contained in this report is about the profiles managed by the MRC Group. Members of the group reported to the

Communications department. However, their positions were funded by the departments they served: Parks and Nature, Planning and Development, and Property and Environmental Services. This meant some positions were informed by two departments.

Exhibit 3   The MRC Group reported to Communications but was funded by other departments

Reports to	Position	Funded by
	Senior Public Affairs Specialist ←	Communications
Communications	Parks & Nature Communications Specialist ←	Parks & Nature
	Senior Public Affairs Specialist ←	Planning & Development
	Communications Associate ←	Property & Environmental Services

Source: Metro Auditor's Office analysis of organizational charts and budget documents

Results

Social media is constantly evolving which makes it difficult to stay current with the latest trends and features. While the use of social media introduces many potential opportunities, it also presents risks. We found that stronger management of social media was needed to address the risks. Access to social media sites was inadequately controlled, and expectations were unclear for monitoring and responding to comments on social media. Metro was in the process of addressing challenges social media can create for public records requirements and needed to develop training to align with changing policies and procedures.

MRC's approach to social media was focused on brand awareness rather than initiating two-way communication. This may keep Metro from meeting its engagement and inclusion goals. MRC could increase public engagement via social media by changing how it reaches people on Facebook and using it to get information from the community. Collaborating with other departments, agencies and the public could help MRC broaden its approach.

Exhibit 4   **Social media presented risks and opportunities**

Risks	Opportunities
• Reputational damage • Service interruption • Non-compliance with public records law • Loss of customers	• Stronger relationships and trust • Better decisions • New customers

Source: Metro Auditor's Office analysis

Risks presented by social media were unaddressed

Social media brings inherent risk to any organization. There are two general areas of risk: reputational and operational. Reputational risk is about protecting an entity's public image. Anyone with access to a social media site can post something negative or false. Operational risk has to do with meeting an entity's goals—it can harm its ability to raise revenue or communicate with customers.

These risks can have multiple impacts on an organization. For example, when social media sites are not adequately secured, they can get hacked and defaced, and site activity can be blocked altogether. A unique aspect of social media is the speed at which information spreads. "Going viral" is an extreme example of how quickly content can be shared. This underlines the importance of being prepared to deal with the adverse effects of social media, and having clear plans to recover before things go wrong.

We found Metro could manage social media risks more effectively by:
- Controlling access
- Addressing challenges social media presents to public records requirements
- Clarifying expectations for monitoring and responding to comments
- Training employees

An underlying cause of Metro's approach to addressing the risks was unclear responsibility for governing social media. Different departments bring unique strengths to the table. Casting a wide net can help Metro prepare for potential pitfalls. We found some departments could have been more involved in certain aspects.

We were told the Communications department developed Metro's social media policy with help from the Office of the Metro Attorney (OMA) and Human Resources (HR). Information Services (IS) was said to have provided limited input.

Responsibility for securing access to agency social media sites was unclear. Metro's information security policy stated that IS was responsible for working with departments to prevent and resolve information systems security problems. Involving IS to develop policies and procedures for social media access could help Metro manage access risks.

IS also includes Records and Information Management (RIM). RIM staff have expertise in managing Metro's information assets that could help Metro employees maintain social media records according to state law. We received inconsistent information about how much RIM staff were involved in reviewing Metro's social media policy.

Responsibility for training employees was also unclear. Metro's social media policy specified that Communications, in consultation with OMA, was responsible for providing guidance to employees as needed. But the policy did not clearly identify who was responsible for training employees.

The need for social media training was recognized. RIM saw IS as a potential partner in developing training. We heard employees in that program were eager to see staff trained to manage social media records, and had drafted guidance for that purpose. However, they considered training a function of Communications.

Other departments can also lend their expertise. If Metro wishes to use social media for responsive communication, including employees who work directly with customers in developing the agency's approach could help Metro engage with on social media. The Council Office and the Office of the Chief Operating Officer also have priorities that may influence Metro's approach. Their involvement could help broaden social media coverage of Metro services, and lend support for new ideas.

Metro did not know who had access to its social media sites

We found the policy for granting access to Metro's social media sites was not being followed. According to the policy, the Communications department was responsible for approving or denying social media access requests. To request permission for access, employees were expected to fill out a social media request form and submit it to the Communications Director.

Communications was not using request forms to grant access. Not following

the policy limited management's awareness of who had access to Metro's sites. A list of employees with authorized access could not be produced. Former and current employees who were no longer responsible for managing MRC profiles could still access them. In addition, the list we received of platforms Metro used was not accurate. As a result, there was no comprehensive list of the agency's social media presence.

Employees responsible for managing MRC's Facebook page shared one username and password. Login information provided administrator-level access, which allowed employees to manage all aspects of the page, including managing roles, creating posts, and buying ads. Anyone with access could enable or prevent others from working on the page, or hide it from the public. Without unique logins, it was difficult to determine who performed which tasks because nearly all posts and ads appeared to be created by one person.

We also found login information was inadequately restricted. The information was stored in a secured document. However, according to management, more employees than necessary could access it.

Best practices for controlling access include minimizing the number of employees with broad access rights and limiting employee access to "need to know." Employees should only have access to applications and data necessary to do their jobs. Facebook offered a variety of page roles, but the MRC Group did not use them.

When an employee is hired, transferred, or leaves an organization, procedures should include changes to that employee's access rights. Access rights were not included on departing employee checklists, and were not terminated for employees who left the organization, or changed jobs. Management understood the threat departing employees posed to the agency's public image, but was unsure if there was a process to terminate employee access.

A tool that secured access to other Metro systems was said to have been identified, but had not been used, to protect Metro's social media sites. A social media archiving tool was expected to help control access, but that tool had not been implemented. IS was aware of social media access risks and related tools, but its authority to develop procedures to address them was unclear.

Social media use brings challenges related to public records requirements

Metro is responsible for maintaining public records, regardless of physical form, under Oregon law. Public records include any electronic writing or photography that relates to the public's business.

Metro's policy required employees to manage social media content in compliance with the law. It specified that:

- original social media content that is not officially maintained elsewhere requires retention, and
- public comments on Metro's social media sites may constitute a public record.

While the policy referenced Oregon public records law, Metro's ability to implement it presented challenges. Metro's policy left some content requiring retention open to interpretation. For example, photos or videos captured and uploaded to social media sites from personal devices may require retention, but were not explicitly outlined in the policy. It was unclear which public comments needed to be retained.

There were also technical challenges to ensure social media content that required retention was preserved. Information created or stored on social media sites is not controlled by Metro, so the agency needed a way to copy what was maintained by third-party providers like Facebook and Twitter.

During the audit, Metro was in the process of addressing both challenges. New guidance was drafted to help employees retain social media posts in compliance with public records law. In June 2017, Metro contracted with an archiving service to address the technical challenges.

However, Metro had not determined whether the archived information would be stored by the contractor or within Metro's systems. Depending on how the agreement was structured, Metro could still be at risk of losing control of the archived information.

Metro's revised policy was expected to be finalized after the archiving tool was installed. At the time of this report, those services had not been put into use. Management planned to finalize guidelines and initiate training in early 2018.

While the draft policy revisions appeared to address the retention of social media records, we found some ambiguity about how social media records should be disposed. Most public records are only required to be held for a specified number of years and then destroyed. Metro did not have guidance for disposal of social media records. We were told the State did not provide direction and Metro had not developed its own plan.

Information governance standards for records management include getting rid of information that no longer needs to be retained by law. According to these standards, organizations need consistent ways to dispose and document disposition of information. There may not be an immediate need to address this issue, but over time, the volume and size of archived content may pose a challenge.

Expectations for monitoring and responding to comments were unclear

Metro's policy did not set expectations for monitoring posts or responding to comments on social media. That meant negative comments and posts could go unnoticed or unanswered, and result in damage to Metro's public image. Without guidance, employees made their own decisions. Some employees were more actively engaged than others in responding to comments. For example, comments on some posts were monitored several times a day, and on weekends to determine if a response was needed. For other posts, monitoring was less intensive, and responses were only made when a commenter requested one.

Some employees would ask others to help respond to comments on their posts. In some cases, they declined. In other cases, they were only asked to help respond to negative comments. Not responding may be appropriate, but it could reduce the potential to build relationships via social media. It may be easier to ignore the social aspect of this technology, but that may keep Metro from achieving its communication goals.

Best practices suggest organizations establish policies that address all aspects of social media use, including monitoring and follow-up processes. Organizations should set clear expectations for responsiveness and ensure they can handle the volume of comments that may result from social media use. Having a plan for how to respond to positive and negative comments, and true or false comments, can help organizations control social media risks.

In addition to outlining expectations in Metro's policy, there may be a need for more specific guidance for various parts of the organization. For example, employees responsible for posts about Metro parks and venues may need more clarity about how to respond to customer service-related comments. Conversely, employees responsible for posts about solid waste, transportation, and land use planning may need more guidance to respond to comments related to policy decisions. Establishing more detailed guidelines regarding when, how, and who should monitor and respond to customers on social media is critical for staff who are managing Metro profiles.

Develop training to align with evolving policies and procedures

According to Metro policy, all employees authorized to post, publish, or moderate public comments should be trained on appropriate and effective use of social media. Only those who were both authorized and trained to use social media should have engaged in social media activities on Metro's behalf. The policy required employees to fill out a request form, which was designed to verify they had been trained on social media.

We could not determine whether employees responsible for managing Metro's social media profiles had been trained because training records were not kept. Some said they had not received any social media training.

Best practices for addressing social media risks include regular training that focuses on the benefits and opportunities, as well as the dangers of social media. Training should also ensure full understanding of the policies and

procedures governing acceptable use and behavior on social media sites.

Employees with access to Metro sites may not understand social media risks. Employees were encouraged to stay informed of social media trends. Some had participated in design and photography workshops, but they were not tailored to Metro's use of social media, or focused on the dangers.

Changes in policy and technology were in process. This presented Metro with opportunities to develop training that aligned with those changes. For example, Metro's social media policy was being revised to include the archiving tool. Employees will need training to support its use, once those revisions are adopted. Additional policy changes may also require employee training.

Opportunities exist to increase engagement and inclusion through social media

Metro missed opportunities to engage and develop new audiences through social media. There were several ways Metro could change its approach. Combining understanding of its social media audience demographics and the demographics of social media users across platforms could help MRC Group reach new audiences. Targeting audiences more broadly through paid advertising could also help MRC find people on Facebook it would not otherwise connect with. Collaborating internally and externally could help MRC build its social media presence and create new ideas for social media use.

Metro aspires to be a leader in civic innovation and services at a regional scale. Innovation and teamwork are core values that are intended to guide Metro's day-to-day actions. The agency takes pride in coming up with innovative solutions and engaging others in ways that foster respect. Engaging with the public and collaborating to solve problems are ways the agency can build trust in Metro, so that it can generate resources to fulfill its mission.

Exhibit 5 **Engagement is in Metro's mission**

We inspire, engage, teach and invite people to preserve and enhance the quality of life and the environment for current and future generations.

Source: FY 2017-18 Adopted Metro Budget

MRC's primary reason for using social media was brand awareness

MRC was using social media more to inform (provide information) than engage (get information back). This use of social media was driven by Metro's Communications strategy. The primary goal of that strategy was to increase awareness of Metro. The strategy identified several ways to raise awareness, including creating content, setting editorial and design standards, and managing Metro's online presence.

To fulfill this strategy, Metro's social media presence was consolidated. In 2014, individual department profiles were discontinued and followers were

redirected to MRC profiles, whose usernames and logos were aligned with Metro's website.

The use of social media to inform was also supported by management's point of view. They thought social media could help MRC increase awareness, and considered it especially useful to increase Metro's website traffic. Website analytics indicated this was true.

We found these priorities reflected in MRC's Facebook ads. Over two-thirds of ad campaigns we analyzed provided the community with information (informed). They primarily consisted of sharing information from Metro's website, including news articles written by Metro staff. Less than one-third of campaigns sought information from the community (engaged).

Exhibit 6   MRC's Facebook ad campaigns mainly informed audiences
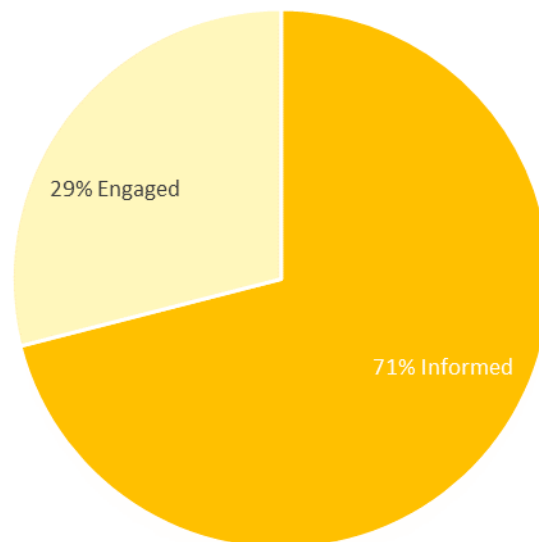
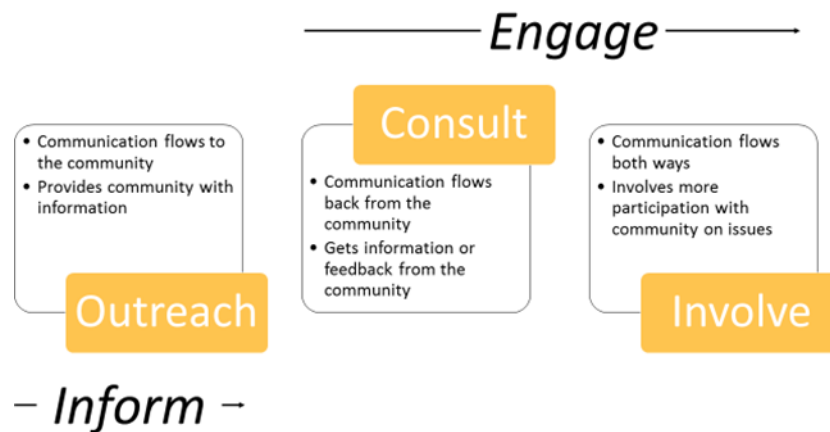*Source: Metro Auditor's Office analysis of a sample of campaigns from July 1, 2014 to June 30, 2017*

Social media can be used to meet different goals and objectives. For example, Metro venues considered social media useful to hire employees, generate revenue, and improve customer satisfaction. They used social media to engage attendees during events and monitored conversations on social media to resolve customer issues. One venue helped a customer find a lost item via social media.

There was potential for MRC to use social media more to engage. Public engagement was a priority for the agency. Metro Charter and Code highlighted the commitment to aiding communication between citizens and Metro Council. Communication goals included improving engagement. One performance measure focused on the quantity of customers relative to the regional population. It sought to grow Metro's readership faster than the region's population growth. Another focused on the qualities of customers. It encouraged participation in communication activities to reflect the region's diversity.

Employees were interested in using social media for engagement. Some of those responsible for managing MRC's social media content considered social media useful for informing *and* engaging. However, more guidance was needed for them to use it to exchange information with the public.

Social media are designed for sharing and discussing information. Best practices suggest they can be used by local governments to inform, engage, or both. When organizations inform audiences, they conduct outreach. At this stage, communication flows one way, to the community. When organizations engage, they consult or involve communities to get information or participation from the community. During these stages, communication flows back and forth, which can build community partnership and public trust.

Exhibit 7   Engagement increases across a continuum

Source: Metro Auditor's Office adaptation of International Association for Public Participation diagram modified by Clinical and Translational Science Awards Consortium Community Engagement Key Function Committee Task Force on the Principles of Community Engagement

Local government experts say the goal of social media should be to increase citizen engagement, government accountability, and responsive and cost-efficient communication. To drive discussion on social media, they recommend asking and responding to questions.

Social media can be used to reach new audiences

Facebook remains the most popular social media platform. Among all adults online, 83 percent of women and 75 percent of men are Facebook users. The heaviest social media user group is not Millennials (ages 18-36 in 2017). New research shows Generation X (ages 37-52 in 2017) spends the most time on social media. Urban and rural Americans use Facebook at the same rates.

Understanding MRC's social media audience demographics, and the demographics of social media users across platforms is key to successfully reaching new audiences. Some technologies are better suited for certain audiences and they are evolving. Available tools and the demographics of those who use them are constantly changing, so making the best use of new applications requires ongoing refinement.

MRC's Facebook fans (people who have "liked" the page) did not reflect the regional population. MRC's fans included more women and people between 35 and 44 years. Portland residents were also overrepresented. They made up over half of MRC's fans, but were only about one-third of the regional population. Surprisingly, some cities outside the region were among the top 10 cities where MRC's fans resided.

Exhibit 8   Women, Portland residents, and 35-44 year-olds were overrepresented among MRC's Facebook fans
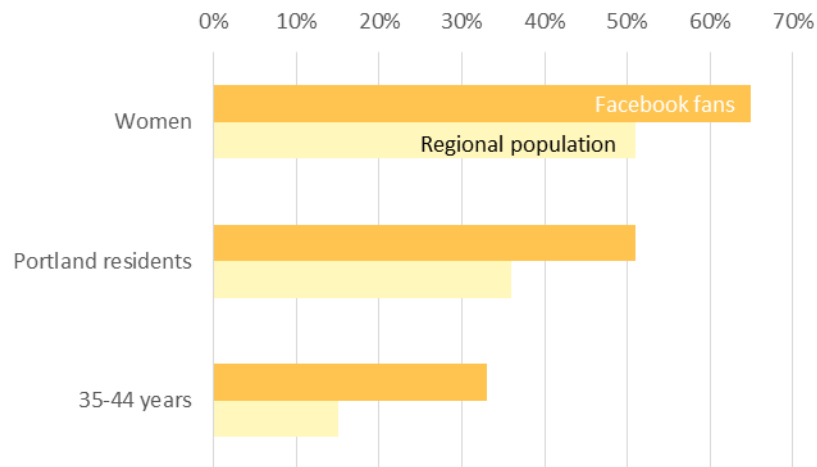
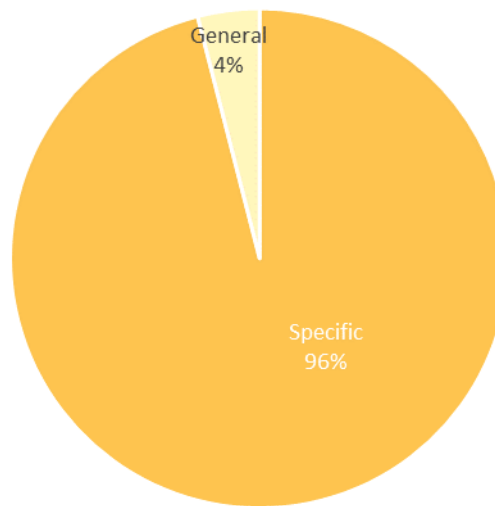*Source: Metro Auditor's Office analysis of Facebook and American Community Survey data*

Metro may not meet its engagement goal via social media if representative voices are not heard. Advertising on Facebook allows governments to reach new audiences, beyond their fans. Facebook ads can target people they want to reach. There are two general approaches to creating a target audience on Facebook.

- Targeting **specifically** gives Facebook well-defined groups of people to show Metro's ads to.

- Targeting **broadly** relies more on Facebook to find otherwise unknown people to show Metro's ads to.

The majority of MRC's Facebook ads targeted specifically. Ninety-six percent (67 out of 70) of the ad campaigns we analyzed targeted specific audiences. Specific audiences included people of a particular age, gender, or location within the region, or with particular interests and behaviors.

Exhibit 9   MRC's Facebook ad campaigns mainly targeted specific audiences


Source: Metro Auditor's Office analysis of a sample of campaigns from July 1, 2014 to June 30, 2017

Neither approach is better than the other—the approach taken depends on what an organization is trying to accomplish and what resources are available. Targeting specifically excludes some people, which can result in some audiences receiving more information than others. Overexposure to content can make some people less likely to take action. Conversely, underexposure could result in missed opportunities to participate. Either outcome can impact the quality and quantity of public engagement.

The audiences MRC targeted may lead to a potential audience that is more interested in what MRC is advertising, but also one that is smaller and narrower. Defining an audience by interests and behaviors may be more appropriate for some content, such as behavioral change campaigns, or engagement opportunities in languages other than English. Those types of campaigns require detailed knowledge of the target audience.

Some of the ads we reviewed seemed to define the audience too narrowly. For example, Exhibit 10 shows a Facebook ad that targeted people interested in sports and recreation, but sought public opinions about solid waste. The same ad was also sent to other specific audiences in an effort to get input about the solid waste system. Defining an audience too narrowly for public participation, project updates, or free parking announcements can exclude people who are otherwise eligible or affected.

Exhibit 10   **This opportunity to share opinions with Metro leaders targeted people who are interested in sports and recreation**
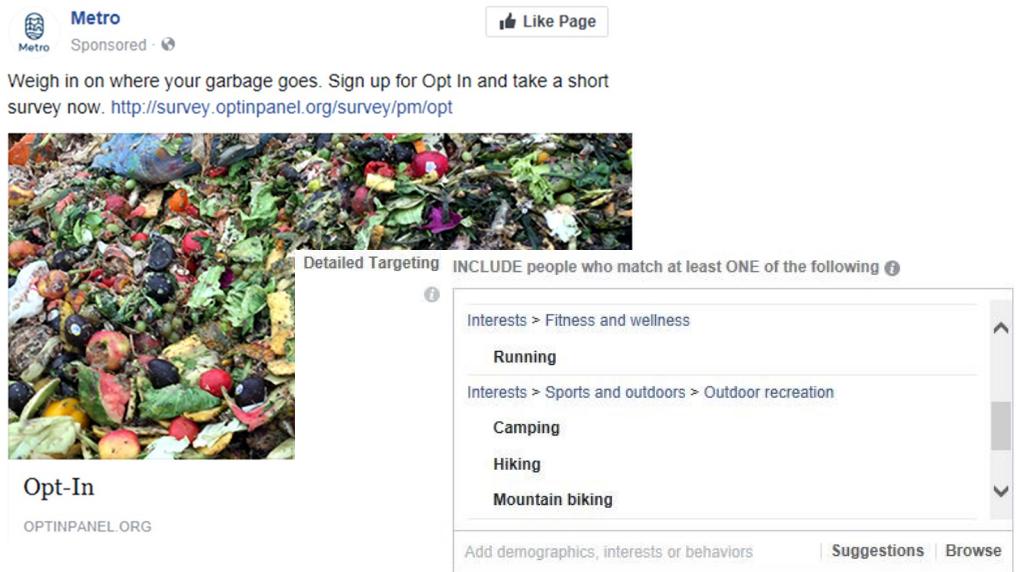
Source: Metro's Facebook Ads Manager; accessed July 5, 2017

Targeting broadly can help governments find new audiences that they would otherwise be unaware of. This approach is more appropriate for large-scale awareness campaigns. It makes sense when organizations are unsure of who they want to target or want to learn how different types of people react to their ads. Facebook and other platforms provide immediate feedback to refine ad content and audiences.

When MRC targeted its general audience, we found it was defined inconsistently. That meant the number and diversity of people MRC could reach varied, even when it was trying to reach all the region's residents on Facebook. Sometimes those under 18 were excluded, other times they were included. Without a stable baseline for comparison, less could be gained from reviewing ad results.

Collaboration needed to broaden MRC's perspective

We found more collaboration was needed to help MRC make use of the opportunities social media can provide. The dynamic nature of these tools makes it difficult to stay current with the latest trends and features. Broader perspectives would ensure all parts of Metro have a chance to be represented on social media, and allow the organization to learn from internal and external experts to inform its strategy.

Some parts of the organization received less social media coverage because the Communications department was focused on four storylines: garbage and recycling; land and transportation; parks and nature; and venues. As a result, Metro missed opportunities to promote budgeting, research, and public meetings, as well as employment opportunities, via social media.

Exhibit 11   MRC's approach to social media limited coverage of some departments

○ = *less covered by MRC's approach*
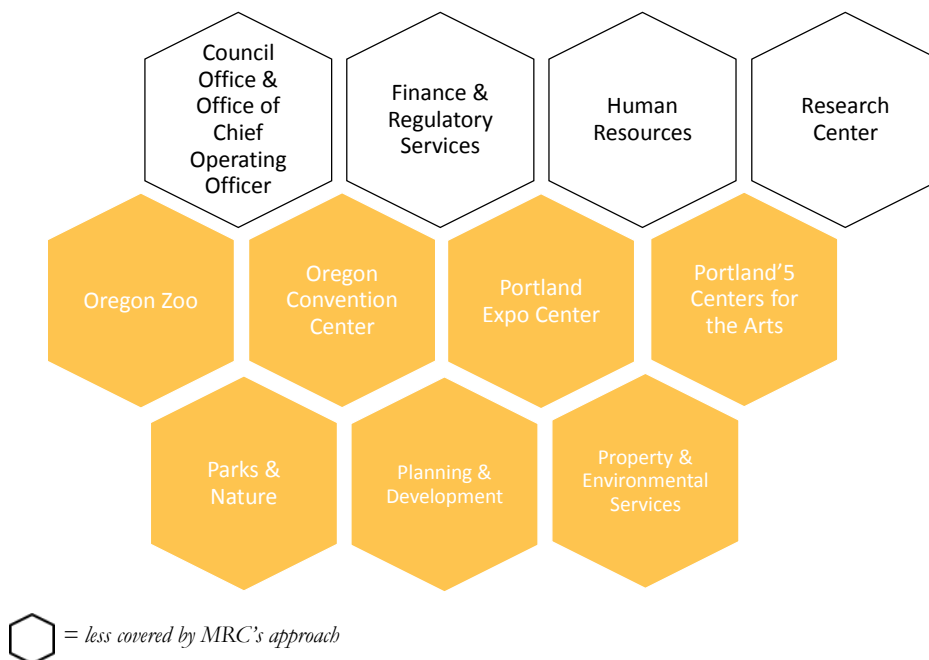
Source: Metro Auditor's Office analysis of offices, departments and venues

To generate new followers, and avoid losing current ones, MRC needed a way to ensure it posted frequently enough. This meant it had to consider the volume of content available and also the employee time needed to manage it before starting a site. It can be difficult to determine if there would be enough content to justify a content-specific platform, or if a more general social networking site would be a better option. For example, Instagram is primarily used for photos and YouTube is entirely videos. But, both photos and videos can be posted to Facebook.

During the audit, we saw MRC try to address these challenges when new ideas or platforms became available. For example, a 2016 pilot project identified the need to include photos of more diverse activities and events in MRC's Instagram posts. However, a method for gathering content across departments had not been established. Soliciting other parts of the organization to provide ideas or content for existing sites is one way governments have overcome this challenge.

Coordinating social media activities more closely with the Office of Citizen Involvement could improve Metro's ability to meet its public engagement goals. The office was created to develop and maintain programs and procedures to aid communication between citizens and the Metro Council. It was required to prepare an annual report evaluating Metro's public engagement efforts with input from the Public Engagement Review Committee. The Committee included representatives from the community who were required to have relevant experience, and reflect the diversity of the region. Annual reports were intended to be presented to Council to

share best practices and upcoming plans for public engagement, but they rarely addressed social media.

Metro's equity strategy also presented an opportunity to take advantage of community expertise so that diverse groups of people could communicate with Metro via social media. The strategy was developed with input from community members and organizations. It would inform Metro's public engagement guide, a document that outlined best practices, including the use of social media.

MRC could learn from other governments to stay up to date on social media activities. Connecting with other governments could help MRC get more ideas on how to use social media in the public sector.

We found support for the MRC Group's connections to its private sector, but not public sector peers. Some group members went to a marketing conference in 2017. The conference was designed for marketers who work for small businesses. By contrast, they did not attend a conference for government social media managers.

Connecting with other public agencies via social media could also help MRC get new ideas. Documenting what types of activities are being deployed by other agencies could facilitate sharing of insights gained from monitoring their social media presence. Some members of the MRC Social Media Group informally kept track of what other agencies were doing on social media. They used their personal accounts to monitor those agencies.

MRC could also learn from other departments. Metro venues were experimenting with social media in different ways. Oregon Convention Center held live Twitter conversations. Oregon Zoo was trying out new video sharing platforms. Including representatives from Metro venues in regular meetings could help MRC brainstorm different ways to use social media. New ideas were discussed at quarterly meetings of Communications managers and staff, but they did not regularly include venue representatives.

Learning from the public could enhance MRC's social media activities. Social media applications are a great way to solicit feedback directly from constituents. Documenting what they would like to see on social media can help transfer knowledge across departments.

Recommendations

To better manage the risks presented by social media, Metro should:

1. Assign responsibility for social media governance, security, and training.

2. Develop policies and procedures to:

    a. increase security and limit administrative rights;

    b. monitor content and respond to comments;

    c. retain public records; and

    d. train employees.

To increase engagement and inclusion through social media, Metro should:

3. Increase two-way communication.

4. Broaden the audiences it seeks to engage.

5. Collaborate with internal and external experts to diversify perspectives about social media.

Scope and methodology

Our audit objectives were to determine if Metro was managing the risks of social media effectively and using social media to achieve its communication goals. The scope of the audit was the agency's current social media presence, use of social media by the MRC Social Media Group, and MRC Facebook advertising from FY 2014-15 to 2016-17.

To gain an understanding of the agency's social media use, we reviewed budget documents, social media sites, and public engagement activities. We interviewed managers and staff, and observed meetings and use of social media. We also analyzed social media staffing and expenditures levels and tested the Communications departments inventory of platforms.

To gain an understanding of the regulatory environment, we reviewed Oregon laws and Metro requirements for social media, citizen involvement, and public records. We also reviewed Metro's vision, mission, and values, communication goals and measures, and organizational charts, in addition to written guides to social media use and records management.

To identify best practices for using social media and engaging citizens, we reviewed relevant management studies and audit reports from other jurisdictions, as well as professional literature. Sources included:

- Government Finance Officers Association
- International City/County Management Association
- Social Media Examiner
- International Association on Public Participation

- Facebook
- GovLoop
- Sprout Social

We analyzed American Community Survey results for the three counties served by Metro and compared them to demographic information reported by people who liked MRC's Facebook page to determine if there were differences between Metro's regional population and MRC Facebook fans.

We selected a simple random sample of MRC's Facebook ad campaigns to draw conclusions about the characteristics of campaign data. We analyzed the sampled campaigns to determine whether they were used to inform or engage the community and target broad or specific audiences.

This audit was included in the FY 2016-17 audit schedule. We conducted this performance audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

Management response

Memo

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

Date: Tuesday, January 9, 2018

To: Brian Evans, Metro Auditor

From: Jim Middaugh, Communications Director

Subject: Management response to social media audit

Auditor Evans,

Metro is using social media, and Facebook in particular, effectively. Facebook is contributing both a greater absolute and greater relative share of traffic to Metro's website traffic every year:

- During 2014, 54 percent of social, or 15,134 sessions came from Facebook
- During 2015, 70 percent of social, or 34,516 sessions came from Facebook
- During 2016, 75 percent of social, or 61,809 sessions came from Facebook
- During 2017 about 85 percent of social, or about 78,000 sessions came from Facebook

Below please find a discussion of the three major recommendations management agrees with:

Access and security
Like many cloud-based services, Facebook only allows one login ID and password for Metro's page. As the audit notes, management has purchased software that will improve security when multiple people require access to a single login. That software currently is being deployed on other Metro systems and will be deployed on social media channels based on resource availability.

Public records
Management believes Metro is in compliance with public records laws. As the audit notes, management also is taking additional steps to streamline the agency's ability to respond to records requests by implementing a new software tool and updated social media policies. Metro remains committed to addressing new guidance, public records rules and regulations as they are developed.

Engagement and awareness
The audit hit the nail on the head on one of the key questions Metro is looking to address: how to turn social media commentary into useful feedback for decision-makers.

Management believes staff currently is using social media effectively to increase engagement. Specifically, it is important to note that the advertisement highlighted in the audit as an example of narrow targeting was part of an overall campaign designed to test different methods of improving awareness and engagement. The ad was not run in isolation.

It is important to note that different social media platforms resonate with different demographic audiences but the majority of each of the audiences is white. Specific targeting of audiences has significantly improved the diversity of Metro's Facebook fans and Instagram followers.

Every Metro social media campaign is part of a larger engagement campaign that attempts to ensure communities of color in the Portland region have a voice. While the audit addresses Facebook, it by necessity does not include analysis of the range of other tools and tactics Metro uses to improve the representativeness of public engagement.

While social media engagement definitely offers benefits, management is also aware of its inherent limits. Most successful social media posts need to be short, which creates disadvantages when engaging on complex projects and plans. For example, there could be instances where social media posts are more effective in raising awareness and driving readers to the Metro website to comment on interactive maps with photos and text, rather than engaging solely on the social media platform.

The audit makes reference to the percentage of Metro posts that "inform" vs. "engage." Metro staff are using a ladder of engagement model that recognizes engagement is a continuum that begins with awareness. Depending on the project or public input desired, different amounts of informing and engaging are appropriate. Management believes Metro is implementing an appropriate balance of awareness and engagement but welcomes examples of different approaches and examples of best practices.

Conclusion

Management agrees that application of additional security measures for accessing social media sites is in order. As resources become available, an existing tool will be implemented.

Management believes Metro is in compliance with public records law and will continue to monitor developments as they relate to social media; and that staff understand expectations related to monitoring and responding to comments on social media.

Management agrees Facebook should be used to broaden engagement and believes staff have an effective strategy in place for moving forward.

Management will reiterate the importance and value of ongoing collaboration and training to staff who have social media as part of their job descriptions and will continue to work with internal and external experts to maintain current perspectives about social media.

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