



City of Portland Core Values:

Anti-racism | Equity | Transparency | Communication | Collaboration | Fiscal Responsibility

4.08 A Social Media

Purpose

This policy and related Guidance describes standards and use expectations for official City of Portland social media account management and access.

Employees who access social media as part of their work are required to complete and follow approved Social Media Plans to ensure compliance with Oregon's Public Record Laws, to support consistent communication practices when sharing information with City of Portland social media account audiences and for managing accounts and content in alignment with related Administrative Rules.

Applicability

This rule applies to all City employees managing, accessing or administering social media for official city business purposes. This rule does not apply to an employee's personal use of social media.

Key Terms

Account Managers – Account managers are appointed or elected officials, or any employee on behalf of a bureau, program, office or service area who are responsible for submitting Social Media Plans and designated to complete steps for account set up and user or account change maintenance.

Authorized Users – Authorized users are approved social media account users for social media accounts who are permitted to login, access and publish content. Users must also understand and agree to follow the requirements outlined in this rule, in the approved Social Media Plan objectives, roles and responsibilities and related Guidance.

Disclaimer – Pending account type and planned use(s), the applicable disclaimer notice will be provided and is a required posting for all accounts to notice the public via a website link URL, hyperlink or statement.

Social Media Account – This is a single social media profile located on a social media technology platform enabling employees to engage for and/or with the public on behalf of the designated City official or City organizational unit (such as a bureau) for the purposes agreed to in approved Social Media Plans.

Social Media Administrator – This is the City Administrator, or designee, responsible for City of Portland Central Communications advice and authorizations for acceptable Social Media Plans and strategies. This role approves account set ups, transfers and deactivations for City social media accounts. The Social Media Administrator provides advice for best practices and information on standards for use in collaboration with the City Attorney’s Office, Technology Services and Human Resources consistent with the related procedures outlined within Guidance for this Rule.

Social Media Plan - This outlines social media objectives, roles and responsibilities through an intake form, steps for account managers that require consultation or set up for appropriate recordkeeping, communications and technology standards and acknowledgments for approved use. Social Media Plans are required for new and active City social media accounts.

Social Media Platform – These include websites or applications available for establishing social media accounts. Acceptable social media platforms are based on allowable technology standards and Social Media Plan approval.

Using Social Media

Account Manager Responsibilities:

- Completion of a Social Media Plan intake process for approval of account(s) activation and account status updates through a new or updated Social Media Plan

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- Consultation with offices as advised in Guidance associated with this Rule to ensure compliance with related City policies and public records laws
 - Identifying employees as authorized users for relevant accounts and ensuring users understand and agree to Social Media Plan objectives, roles and responsibilities
 - Ensuring compliance with records retention requirements as described in this rule and related policies
 - Management of content according to requirements described in this rule
 - Notification to the Social Media Administrator of significant account modifications requiring plan updates to account status, name, description, disclaimer or objectives roles and responsibilities

Authorized User Responsibilities:

- Accessing accounts with understanding and agreement to follow objectives, roles and responsibilities in approved Social Media Plans
- Compliance with Records Retention requirements as described in this rule and related policies
- Management of content according to requirements described in this rule

All employees with access to City social media account content creation must follow the City's administrative rules, including not disclosing confidential information, protection of the privacy of others, and refraining from publishing information or opinions related to legal matters, litigation, or parties involved in legal and litigation matters.

Management and Maintenance/Use Expectations

Social Media Account Management

City Social Media accounts shall be managed in accordance with the terms contained in a Social Media Plan. Account managers must create a Social Media Plan in order to establish a new social media account. The Plan will detail the agreed-to objectives, roles, and responsibilities for account management and access. Forms for Plan intake are available in the Guidance associated with this Rule.

A Plan will be reviewed once a plan is submitted. Consultation may occur to provide the account manager or users with resources for social media use.

Plans are required for new and active accounts, and at a minimum include requirements for the following:

- Identifying account managers and authorizer user names;
- Listing the account type, page name and descriptions for public-facing profile information consistent with naming conventions;
- Estimated or requested date for account start;
- Description of the hours the account will be monitored, in general and as known;
- Archiving enrollment completion;
- Terms of Use, Prohibited Content Disclaimer Notices – This is language specifically provided and determined to be applicable for a particular social media account based on appropriate terms of use and prohibited content, the account type (public official or organizational unit), the forum communication or engagement plan (open or limited), and other statements or intents regarding public records law, privacy, advertising or endorsements. These notices may need to be updated or re-published if account content or Social Media Plan details are modified;
- Meeting City communications standards as determined by the Social Media Administrator to support accessibility, City branding, content creation and engagement; and
- Acknowledgement of terms for social media account management and use and acceptance of responsibilities including archiving and retention expectations as outlined in Social Media Plan.

Account Modifications

Changes to account details must be communicated as soon as needs are known. Account managers are responsible for requesting updates for accounts with the Social Media Administrator. Examples of modifications to accounts necessitating updates may include:

- Updates to password or usernames
 - Updates to names, photos or other branding standards
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- An account deactivation due to an office or official organizational transition or departure
 - Changes to objectives, roles or responsibilities in Social Media Plans including disclaimer language
 - Need for public service announcement emergency communications

For changes to status of accounts established for appointed or elected officials who are no longer employed at the City, account managers must coordinate with the Social Media Administrator to follow deactivation procedures.

If original account objectives for any accounts are no longer in alignment with social media account use, needs or plans, the Social Media Administrator in collaboration with the City Attorney's office are authorized to disable the account from active status to inactive to ensure proper archiving and public noticing occur.

Refer to guidance to learn more about these requirements.

Record Retention and Content Management Requirements

Records Retention

Each employee must maintain and preserve records in compliance with the Oregon Public Records laws, applicable City Record Retention Schedules and related Administrative Rules. Under public records law, the City is required to maintain records for the period provided in the retention schedule for that type of record. The public records law applies whether the Site is hosted by the City or a third party. While some public records are not required to be kept longer than needed for current purposes, many records, created or received, must be preserved and are a shared responsibility of the account managers and authorized users. All records, except for those excluded by law, are available for inspection and copying by the public and must be accessible for the period established by the applicable City record retention schedule.

Content Management

1. Managing Social Media Content that is Officially Maintained Elsewhere
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Authorized users and account managers can simplify retention responsibilities by only using social media as a mechanism for providing residents with links or references to content that is maintained as an official City record elsewhere. Using this approach, the links or references on platform accounts are considered convenience copies which need to be kept only as needed or until superseded.

2. Managing Original Social Media Content

For publishing content that does not exist elsewhere or for enabling an open forum feature on the platform account, authorized users and account managers may receive content from outside resources that will fit the definition of a public record. Greater care must be applied to manage this content and retention requirements.

Most original content will fall into one of the categories below and will need to be managed and retained as such:

- Speeches/Statements/News Releases/Program Activity Records

For retention purposes, a City post (for example) is the equivalent of a public speech. A written or photographed account of a City event, or summary of its activities, published via any social media is considered a report. If these examples contain policy or historically significant content, they must be retained permanently. Otherwise, posts need to be retained for two years.

- Correspondence

Incoming messages from the public should be handled as correspondence. If a message is completely unrelated to the account objectives or organizational unit functions or activities, account managers may remove it immediately. Correspondence that relates to account objectives, activities or functions must be captured and retained per the appropriate retention category.

For a direct response to an individual (as opposed to a public posting), the account manager or authorized users are advised to use other mediums apart from social media platforms, if possible, to communicate with the individual and maintain that correspondence using established record retention procedures. Correspondence between elected officials or appointed

employees and the public may be considered “policy and historical” requiring permanent retention.

- Content Associated with a Specific Function or Activity

If an account is soliciting specific information such as a poll or initiating a ticketing-for-service process, the information received must be retained along with other records associated with that function or activity following appropriate retention schedule.

3. Managing Social Media Content - Technology

Technology tools for preserving social media content are supplemental to public records preservation requirements. The methodology and responsibilities for capturing and preserving appropriate content must be a documented component of the account manager’s Social Media Plan. Refer to archive enrollment details in guidance.

Resources

- [Related Human Resource Administrative Rules: 1.03 Public Records Information, Access and Retention, 2.02 Prohibition Against Workplace Harassment, Discrimination and Retaliation, 4.06 Political Activity, 4.08 Information Technologies; 4.09 Use of City Resources; and 11.01, 11.02 and 11.03 \(Ethical Conduct\)](#)
- [Bureau of Technology Services Rules](#)
- [Oregon Revised Statutes and Government Ethics Guide](#)
- [Archives and Records Management Division](#)
- Guidance (refer to separate attachment for recently updated version)

Administrative Rule Record

Adopted November 4, 2011
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