Policy writing for digital projects

In the same way that many museums have conservation or collecting policies, there are a set of policies that museums might want to consider developing which could help them manage their digital activity. Obviously, every museum or project is different and so any policy you create should be tailored to your own organisation's needs or objectives. It should also be made clear that although the advice and examples that follow are practical and based on real world examples, they do not classify as 'legal advice'. If you're unsure around particular safeguarding, employment or copyright issues which might have serious implications for your organisation, you should consult a law professional or appropriate government body.

The following four policies are (currently) the most common which relate to online or digital activity, and creating your own versions should help your museum to feel confident when using platforms or engaging with your audiences digitally.

Jump to guidance on:

[Social media policy](#)
[Filming and photography policy](#)
[Copyright policy](#)
[Safeguarding policy](#)

Social media policy

What is it?
A social media policy is a code of conduct that provides guidelines for an organisation's workforce (this could be paid staff or volunteers, including trustees) who post content on the internet either as part of their job or as a private person.

Why might I need it?
With the use of social media often blurring the boundaries between our professional and private lives, policy or guideline documents can provide workers with helpful information concerning how to use or when to set up social media applications. It should support them in maintaining a safe professional environment and protect both themselves and their museum. A policy might also offer helpful advice around what type of content to post, which other policies they might need to refer to (i.e. copyright and safeguarding), information about an organisation's values or brand as well as a response framework to help users know when and how to respond to queries or complaints.

Examples
Similarly to strategy documents, the layout and content of policies can be very different depending on the organisation. Two examples of social media policies are included in Appendix 1 of this document. One is a template based on an existing organisation's policy and Bristol Museum and Art Gallery's current guidelines.

Photography and filming policy

What is it?
A photography and filming policy is usually a document which establishes a venue's approach to taking still or moving images of its collections.

Why might I need it?
With images and video being the most shared assets online, and with more and more of your visitors coming into your galleries with a smart phone capable of taking high quality images/video, you should probably revisit your museum's approach to filming and photography in light of visitor expectations and any collections care or copyright implications.

First up – do you currently allow photography or filming in your gallery space? If you do, are there conditions (i.e. for personal use only, no flash photography)? Would you like to harness the power of social sharing to spread word of mouth about your organisation and would therefore like to *encourage* certain types of photography? Are those responsible for social media channels bound by the same policy as your visitors?

Having a think about what's best for the museum and the collection as well as taking copyright issues into consideration, and then writing a common-sense approach to filming and photography inside the gallery spaces as well as the stores will make it easier for visitor hosts or assistants to know how to respond to queries, as well as empower your staff internally to use photography and video on social media.

Examples
You might not need a separate policy for this, but rather choose to integrate information about it into an existing document (i.e. make it part of your copyright policy). Policies which are freely available to view online include this policy from Toledo Museum, information on the British Museum's site and the Royal Museums Greenwich site.

Copyright policy

What is it?
Copyright is the legal right that protects the use of your work once your idea has been physically expressed. The current copyright legislation in the UK is the Copyright, Designs and Patents Act 1988. You can find out more about copyright legislation by visiting the [Intellectual Property Office](#). In the context of a museum, a copyright policy can help explain a few things. The first is how the organisation intends to protect its own copyright (which often relates to copyrighted images of collections) and what it asks of its users, the second is how a user can contact the organisation in relation to their own copyright concerns.

Why might I need it?
With museums offering users the opportunity to view and download large numbers of collection images / video / audio, and with staff using collection items on digital channels as part of their promotional or engagement activity, there's more digital media flying around than ever before – most of which will be copyrighted.

As a result, you might wish to put some information together which explains your museum's approach to copyright, in order to explain to staff or visitors how they are permitted to use digital assets. You might also like to offer people a way to contact you should they have concerns over the museum using their own copyright inadvertently. This is often described as a '**Take down policy'**.

For staff, a guide to how you expect them to use assets where the museum owns the copyright might be helpful. For example you might be happy for your staff to use museum copyrighted images on Twitter and Facebook, but only up to a certain size or only with a credit somewhere. You might also like to make it clear how staff or web users can find out information on copyright, so that they know how they can use an image.

To encourage sharing and dissemination, some museums have started to release their images under one of the six [Creative Commons](#) licenses – some of which allow copyrighted material to be copied, shared and edited as long as certain conditions are met.

Examples
Examples of public facing copyright policies include the [British Museum's policy](#) – which includes information about their approach to Creative Commons – and this policy from the [Royal Ontario Museum](#). You may wish to have one policy which applies to everyone (both staff and museum users), or create something for internal use only.

Find out more
There are further resources regarding copyright on the South West Museum website. You can find these at: http://www.southwestmuseums.org.uk/publications-resources/resources/digital-engagement-resources

Safeguarding policy

What is it?

A safeguarding policy is usually an internal document which explains how an organisation will safeguard children, young and 'vulnerable' people. There is [information from the government about safeguarding activity on their website](#). A policy such as this normally explains the procedures and systems an organisation must put in place in order to ensure the safety of any children, young people or vulnerable adults in their care.

In the context of digital activity, a safeguarding policy will also contain guidance on confidentiality and information sharing – particularly around the use of personal information (including photography and recordings) on digital platforms such as websites and social media.

Why might I need it?

Any museum engaging with young people or vulnerable adults should have a safeguarding policy in place. This wouldn't necessarily be the responsibility of staff responsible for digital activity and often sits with the wider Governance, Learning or Programme team. In terms of digital activity, wherever there is the possibility of a museum using images, recordings, or publishing personal information about children, young people and vulnerable adults, the museum should refer back to its safeguarding policy to ensure all of the relevant checks are in place.

For example, if your safeguarding policy makes it clear that using images of young people online requires signed and dated consent forms from responsible adults, this consent must be sought before the use of any imagery or recording. Your museum might also have rules when it comes to the recording of school groups (i.e. even **with** consent no identifiable information such as names or school insignia can be uploaded onto public channels) in which case relevant staff need to be aware of this before they share information online on behalf of the museum.

Examples and further links

[British Museum safeguarding children and vulnerable adults policy 2014](#)
[Liverpool Museums safeguarding policy May 2014](#)
[Information on safeguarding and child protection from Arts Council England](#)

Appendix 1

The following social media policy is based on a free template from Spitfire Strategies. This policy document is just an example and should always be adapted to suit the needs of your own museum. The original can be found at: http://www.spitfirestrategies.com/wp-content/uploads/2015/03/SPT_SMARTS_Sample_Policy.pdf

Some Museum Social Media Policy

This policy governs the publication of and commentary on social media by employees, trustees and volunteers of **Some Museum** and its related companies. For the purposes of this policy, social media means any facility for online publication and commentary. This policy is in addition to and complements any existing or future policies regarding the employee behaviour, use of technology, computers, e-mail and the internet.

Some Museum employees, trustees and volunteers are free to publish or comment via social media in accordance with this policy. **Some Museum** employees, trustees and volunteers are subject to this policy to the extent they identify themselves as a **Some Museum** employee (other than as an incidental mention of place of employment in a personal blog on topics unrelated to **Some Museum**).

Publication and commentary on social media carries similar obligations to any other kind of publication or commentary.

All uses of social media must follow the same ethical standards that **Some Museum** employees, trustees and volunteers must otherwise follow.

Setting up Social Media

Assistance in setting up social media accounts and their settings can be obtained from **Some Museum's** (insert staff title here e.g. 'Chairperson' / 'Curator').

Social media identities, logon ID's and user names may not use **Some Museum** 's name without prior approval from a recognised **Some Museum** Trustee.

Don't Publish Confidential Information

It's perfectly acceptable to talk about your work and have a dialog with the community, but it's not okay to publish confidential information. Confidential information could include things such as embargoed announcements, details of current projects, customer information, personal details of colleagues, financial information or research.

Be Honest

We believe in transparency and honesty. Use your real name, be clear who you are, and identify that you work/volunteer for **Some Museum**. Nothing gains you notice in social media more than honesty - or dishonesty. Do not say anything that is dishonest, untrue, or misleading. If you have a vested interest in something you are discussing, point it out. But also be smart about protecting yourself

and your privacy. What you publish will be around for a long time, so consider the content carefully and also be cautious about disclosing personal details.

Respect copyright laws

It is critical that you show proper respect for the laws governing copyright and fair use or fair dealing of copyrighted material owned by others, including **Some Museum's** own copyrights and brands.

Respect your audience, Some Museum, and your fellow alumni

The public in general, and **Some Museum** 's employees, trustees, volunteers and supporters, reflect a diverse set of customs, values and points of view. Don't say anything contradictory or in conflict with the **Some Museum** website. Don't be afraid to be yourself, but do so respectfully. This includes not only the obvious (no slurs, offensive or defamatory comments, personal insults, obscenity, etc.) but also proper consideration of privacy and of topics that may be considered objectionable or inflammatory. Use your best judgment and be sure to make it clear that the views and opinions expressed are yours alone and do not represent the official views of **Some Museum**.

Protect Some Museum partners and suppliers

Partners or suppliers should not be cited or obviously referenced without their approval.

Never identify a partner or supplier by name without permission and never discuss confidential details of engagement. It is acceptable to discuss general details about kinds of projects so long as the information provided does not violate any non-disclosure agreements that may be in place with the customer or make it easy for someone to identify the customer.

Controversial Issues

If you see misrepresentations made about **Some Museum** in the media, you may point that out. Always do so with respect and with the facts. If you speak about others, make sure what you say is factual and that it does not disparage that party. Avoid arguments. Brawls may earn traffic, but nobody wins in the end. Make sure what you are saying is factually correct.

Be the first to respond to your own mistakes

If you make an error, be up front about your mistake and correct it quickly. If you choose to modify an earlier post, make it clear that you have done so. If someone accuses you of posting something improper (such as their copyrighted material or a defamatory comment about them), deal with it quickly - better to remove it immediately to lessen the possibility of a legal action.

Think About Consequences

It's all about judgment: using your blog/account to trash or embarrass **Some Museum**, our supporters, volunteers, or your co-mentors and fellow alumni, is dangerous and ill-advised.

Disclaimers

Wherever practical, you must use a disclaimer saying that while you work for **Some Museum**, anything you publish is your personal opinion, and not necessarily the opinions of **Some Museum**. However, although this is good practice and is encouraged, don't count on it to avoid trouble - it may not have much legal effect.

Appendix 1 (cont.)

Bristol Museum and Art Gallery Social Media Principles

V1: October 2013

What is 'social media'?

Social media consists of websites and online forums where content is shared. Bristol Museums, Galleries & Archives (BMGA) currently have accounts and share content on the following channels:

- Facebook – website for connecting and sharing what's happening
- Twitter – real-time information network consisting of 140 character messages
- Youtube – platform for uploading and sharing video content
- Wikipedia – online encyclopaedia to which anybody can contribute
- Flickr – photo and video sharing website
- Vine – 6-second video clips from the makers of Twitter

Social media is one of the ways in which we engage with the public. It doesn't take long and has been proven to be of benefit to the service. For example, over 15,000 people saw activity from our Bristol Museum & Art Gallery Facebook page on 23 September 2013.

Why do we use social media?

In recent years the way we use the web has changed significantly. From April to June 2013, 43.5 million adults (86%) in the UK had used the Internet (ONS Internet Access Quarterly Update, Q1 2013). The majority of people use digital or online technologies in some way; whether it's sharing photos on Facebook or checking a website for information or research purposes. It is a common misconception that social media is only used by young people – all different types of audiences are active on lots of different channels.

Whether we are on these channels or not, people will post content or comment online about their visit or experience with us. Using social media means that we have the chance to get involved in these conversations, as well as 'pushing' information out to our followers, be it on events or exhibitions or to encourage engagement with our collections.

This document outlines principles to communicating with audiences on social media websites, including:

- Identifying our key objectives for using these channels
- Processes to be followed and best practice for uploading content
- Looking at how we can optimise resources to develop engaging content and build on online audiences

Our social media accounts combined (October 2013)

18,000 Twitter followers 6,000 Facebook likes 13,000 Youtube views

1. Key objectives

i. Build audiences and encourage participation online

With the ability to reach audiences locally, nationally or even internationally, our social media accounts should be seen as a fun, interesting source of information and somewhat of a „gentle reminder" a few times a week that we are here, as opposed to a „hard sell". Communicating in an informal manner enables us a degree on control over how the organisation is perceived publicly and shows that we are being proactive in the way we communicate.

The aim is to have varied content with a cohesive tone across channels, so using our websites as referral points is a good way of putting this into practice. Depending on the social media channel, there is a limited amount of information that can be posted. Where possible, referring people back to pages on our websites ensures that audiences have access to relevant, up-to-date information and gives them the opportunity to explore what we offer on a deeper level.

ii. Increasing engagement with our collections

We want to share with people how good our collections are. We need to make sure that we're being as accessible as possible with this, and social media is one of the ways in which we can increase engagement with items that may or may not be on display already.

Cultural organisations have been finding that, despite fears of discouraging people to physically visit, promoting items from collections online or digitally actually has the opposite effect; visitors are more likely to want to see objects „in the flesh" or find out more about particular collections. Read this article about this happening at the British Museum.

iii. Telling people about exhibitions, events and activities

Social media is a quick, easy way to get information out to people in real-time. Telling people about our public programming on social media is an effective marketing tool to encourage participation in museum activities with audiences who are already engaging with us. We need to ensure that we have a balance, and that we're not being repetitive with our posts – have a look at the Toolkit for more good practice when posting.

Due to the nature of social media, it can also be used as a customer service tool, sending out information for visitors, as well as being a way that we can proactively respond to any negative comments.

iv. Participating in conversations with online audiences and communities

We already gets lots of comments and feedback online, from people sharing their experiences at our exhibitions to which items in our collections they remember from their childhood. Actively participating in these conversations gives us a voice and allows us to talk to individuals and community groups in a public way, building on relationships and encouraging cross-promotion.

2. Resources

i. Digital Team

We have a core Digital Team – get involved! This is a group of people across the service who are involved and/or interested in digital technologies. The group meets every four to six weeks and is open to anyone to join and contribute to. We already have staff from Front of House, Development, Marketing, Collections and more who are involved.

The Digital Team is designed to be a support network and resource 'centre'. Use the group as a forum to discuss content for social media, for any help or training if you're new to social media or to look at any channels we could be using to benefit the service.

We have an open approach to accessing social media; this means that we are happy to give any staff members access to post on our accounts. Just let your manager know that you'd like to get involved - see the Toolkit in section 3 for more information on getting access.

ii. Evaluation

We need to be tracking what we are posting, when we're posting it and what response it's getting so that we can demonstrate our impact to stakeholders such as funders, friends groups and staff. Evaluation is a great way of refining content and seeing what's working together with what might not be working so well. Use it as a resource!

Evaluation is key to ensuring we are spending time efficiently and should be used as a tool to enhance what content we post on social media. We have processes in place that are designed to make it easier to keep track so that the service can make informed decisions, with social media evaluations incorporated into performance and exhibition reports, as well as more in-depth online performance reports every six months.

iii. Content from all areas of the service

We want to demonstrate what we do. We are fortunate in that people want to hear about what we do; all the exciting events and activities we put on and information from behind the scenes.

Whether you post directly onto our social media accounts or would prefer to leave that to others, and regardless of what area you work in, let people know what you're doing so that we can shout about it! Without that knowledge it's impossible to keep track of all the interesting and exciting things happening, so we all need to be thinking about what we can contribute from our areas and to make sure they are represented.

iv. Personal accounts

Many of our staff and volunteers are already active on their own social media accounts. We actively encourage anyone who would like to post about what they do to do so, providing the content is appropriate, is not derogatory or confidential and does not risk security (e.g. posting pictures which show entrance security equipment is a big no-no). Similarly, staff and volunteers are encouraged to

interact with the service's social media accounts on a personal level; commenting, liking, sharing with their own friends and followers. This could potentially be just as much of a resource for us as using the official accounts.

Posting content on personal accounts fuels the service's accounts; giving us specific content for different areas that we can share and boosting our following with audiences who are likely to interact. If you come across individuals or community groups who are on social media that it would be good to follow and interact with, let us know.

With regards to personal accounts, you need to make sure you are familiar with Bristol City Council's Social Media Protocol and Code of Conduct, which can be found on the Source – particularly the sections relating to social media, personal websites and blogs. Any social media accounts that indicate that you work for the service or the council need a disclaimer such as "All views expressed here are my own" – see our Digital Manager Zac's Twitter profile below for an example.

In the event that you are contacted by the media or if you have any media requests regarding the service on your personal account, refer them to Marketing / the Press Office.

3. Toolkit

i. Access to BMGA's social media accounts

If you are interested in posting on museum social media accounts, first and foremost you need to make sure that you have your manager's approval and/or it is part of your workplan. Even just a few minutes work each day could have a big impact on raising the profile for your area.

Let us know you are interested – the next step will then be to come along to a briefing, which will involve some training (if needed), a look through this document and a discussion about what sort of content you might want to post. Please note: without attending a briefing, you will not be able to have access to any museum social media accounts.

Currently we use Hootsuite to post on Twitter. This is so that we are able to manage and monitor multiple accounts at once, for tracking clicks on links we post, monitoring popular content and also for scheduling tweets. You will be given a login to Hootsuite at your briefing session; without this you will be unable to post content on Twitter.

To ensure security, passwords for social media accounts will be changed on a regular basis – if you have access we'll keep you posted when this happens. You must not share social media login details with anyone.

ii. Good practice

Some guidance for sharing content on social media.

Posting –

- Think about your tone. Content should be informal yet informative – this is a public 'voice' and people will respond to posts that show the human side of the service. Take a look at past posts if you're unsure.
- Be open. If you make a mistake, say so! People like honesty.
- Double-check before posting. We need to be sharing information that is correct; always check with Marketing if you are unsure whether we have released information via a press release or by other means before posting.
- Check recent posts. Have a look to see if we've already posted about something, and when that was. We need to make sure we're not being repetitive.
- Ask people if in doubt. You're not on your own, if you're unsure it's always good to get a second opinion.
- Track links. Whether it's Hootsuite links on Twitter or Bit.ly links on Facebook, if you don't track it, we can't see how many of our followers clicked on your content!
- Think about the time of day. Generally, people are more active online in the morning. If it's late in the day, it might be better to schedule it for the next morning.
- Think about other channels and who you're trying to reach. Is there any other way of getting the word out? Social media is great if used in conjunction with other channels (and isn't necessarily the solution all the time!).
- Make sure our branding is correct. i.e. M Shed, not MShed or M-Shed. Please refer to the brand guidelines on the S drive if in doubt.
- Keep up-to-date. Make sure your sections on the website / pages you are linking to are up to date with correct information before you post.
- Use evaluation. There'll be information in evaluations which will show you what our followers have engaged with in the past – use this to your advantage!
- Tag other users. If our post involved others, check first whether they have an account. „Tagging" them means that we're showing our awareness of the online community, and will encourage others to do the same for us.

Responding –

- Think about the most appropriate response. For example, on Twitter, we don't always have to retweet; sometimes it's good to send a reply or favourite.
- Acknowledge responses when we can. People need to see that we are there, and that we haven't just posted without checking up on it afterwards!

Photography and video –

Use where possible. Past evaluation has shown that our followers, in particular on Facebook, are much more likely to engage with a post if it involves imagery.

Check the copyright or licencing. We have a vast image library and a big audience to share multimedia content with; if it is not our copyright we need to gain permission from the photographer / maker of the work to use it. If in doubt, don't use it – post something else!

Get permission. We have a legal duty to be careful with our use of photographs of people who are identifiable. You must get the written permission of all the people who will appear before you take, use or upload photographs. Extra care and consideration must be taken with children and written consent given by parents or carers.

Please contact our Digital Manager Zak for more information on this.

iii. Managing accounts

Social media accounts need constant monitoring so that we can ensure timely and relevant updates and responses.

If you are involved in content or have posted something on any of our channels, you need to make sure that you are checking back at regular intervals to gauge reaction and to respond to any comments.

Social media accounts don't get switched on at 9am and off at 5pm; our followers will send us posts or comments 24/7, seven days a week. Please take into account that you may need to monitor accounts outside of normal office hours.

If you are running an event or activity, make sure there is someone there (if it's not you) who can post and respond to comments on the day.

If you have any questions, please contact the Digital team.