

**NCHRP 25-25 TASK 80:  
SUGGESTED PRACTICES GUIDANCE RESOURCE**

*Requested by:*

American Association of State Highway  
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## Guidance Resource for using Social Media during the NEPA Process

This resource is written as a guide that can be reviewed by project managers, environmental task leads, and public involvement practitioners. Recommendations and insights from the NCHRP 25-25 Task 80 study data collection process and project case studies follow in checklist format to provide suggestions for social media implementation during the National Environmental Policy Act (NEPA) process. This Guidance Resource is prepared with two complementary parts:

- Suggestions for implementing social media during the NEPA process, organized in a checklist format for project teams to discuss and agree upon the many factors that go into effective social media outreach while also paying attention to the unique needs of public involvement during the NEPA process.
- Matrix of tools available for social media and web-based interaction, including descriptions, features and suggested uses during the NEPA process, presented as an online resource at [www.NEPAandSocialMedia.com](http://www.NEPAandSocialMedia.com).

For additional information about use of social media during NEPA, including case study examples, please consult the final report for NCHRP 25-25 Task 80.

### Checklist of Considerations for Implementing Social Media

Prior to introducing social media outreach, considerations related to purpose, process, content and how it fits into an overall public involvement plan should be addressed. Three key documents form the basis of agreement on approach and an action plan for social media: an agency's social media policy, a workflow protocol and a project-specific social media communications strategy as part of the public involvement plan.

Social media can be leveraged as a tool for engagement where interactive communication takes place in addition to building project awareness, as indicated by case studies for this research in early 2013. A robust use of project-based social media can broaden stakeholder outreach, create a more informed public yielding more substantive and meaningful comments and generate valuable discussion and input to the NEPA decision making process. Social media provides an opportunity to gauge real-time reactions to project information and can serve as a key tool for assessing public sentiment about the study process and project alternatives.

***Social Media  
Checklist Overview***

- ✓ *Purpose*
- ✓ *Tools Selection*
- ✓ *Policy*
- ✓ *Protocol*
- ✓ *Strategy*

The checklist of considerations presents a series of decisions a project team can address in order to implement a social media outreach program to meet goals for public involvement. The term *social media* is intended to apply to the most prevalent and populated social media platforms such as Facebook and Twitter; however, these social media tools could be substituted with other social media platforms and collaborative websites.

The five checklist considerations are iterative and interactive in the sense that decisions about each may influence or change aspects of the others. These considerations must be flexible and reviewed periodically in order to address changing social media practices and respond to the type of interaction occurring on the project's social media sites.

### **Defining the Purpose of Social Media Outreach**

Public involvement planning begins with defining goals and objectives for engaging stakeholders in the NEPA process. An initial stakeholder analysis and assessment of the study context provides valuable information for selecting a range of outreach tools. Social media is one of the options for public involvement tools and lends itself well to fulfill the intent for NEPA public involvement due to its

*A robust use of social media can broaden stakeholder outreach, create a more informed public yielding more substantive and meaningful comments, and generate valuable discussion and input to the NEPA decision making process.*

interactive nature. Social media can be used to provide timely public notification throughout the study process, provide access to documents and comment forms for public review and use, and serve as a central point of communication for early and continuous public information. As social media continues to grow as a readily available and common communication tool, NEPA project teams should consider the opportunities to use social media to engage with project stakeholders in interactive dialogue as a method of public input.

Like any other public involvement tool, project teams should consider how social media can best support the NEPA public involvement process and define the purpose of its use. Due to the broad base of users and the interactive format of social media, it can be a prime vehicle for posing questions and soliciting input from project stakeholders.

#### *One-way, Two-way and Interactive Communication*

Social media can be used for one-way, two-way or interactive communication. One-way communication refers to sharing information with no opportunity for feedback. Although one-way communication can fulfill the NEPA requirement for public notification such as publishing a legal notice, it does not facilitate public input.

Two-way communication describes a traditional public involvement model of sharing information and receiving comments. A public meeting, for instance, is often approached as a two-way communication tool where information is presented to stakeholders for their review and comment. Project information is prepared to create a more informed public with the expectation of feedback in return.

***Possible Social Media Purposes***

- ✓ *Monitor public discussion*
- ✓ *Broadcast information*
- ✓ *Gather information*
- ✓ *Receive comments*
- ✓ *Engage stakeholders*

Social media presents an opportunity for interactive communication, where stakeholders can view and respond to each other’s comments in a multi-directional online conversation. Social media can be compared to a virtual dinner party, where conversations run in fits and starts with interruptions, divergences, emotions and opinions.

The move from using social media as a one-way communication tool to an interactive public participation method holds great potential. As public expectations for transparency and accountability continue to grow, social media provides an efficient forum to share information and hear people’s reactions during the study process. Going beyond two-way communication, social media facilitates a layered discussion that can give voice to multiple viewpoints

and engage stakeholders in holding their own conversations about what’s important and what trade-offs are acceptable when examining a proposed action. Providing a social media site enables the project team to host the project discussion and provide reliable data to inform stakeholder discussion.

**Table 1: Potential Uses for Social Media during NEPA Processes**

<b>Potential Purpose of Social Media Use</b>	<b>One-way, Two-way or Interactive Communication</b>	<b>Description</b>
Monitor discussion	One-way	A project team without social media presence can engage in monitoring discussion of the project and/or agency on social media to understand public sentiment and the public involvement context within the community. For example, Los Angeles MTA spent time reading external blogs and comments prior to launching their own agency blog and project social media sites.
Broadcast information	One-way	Social media can be used to share links and make announcements such as information about an upcoming public meeting or availability of a draft document for public comment. For example, Missouri DOT used social networking sites to link people to the Metro I-70 collaborative website.

Potential Purpose of Social Media Use	One-way, Two-way or Interactive Communication	Description
Gather information	Two-way	Social media can be used to gather data relevant to the NEPA study through polling, surveys or other qualitative and quantitative analyses. Social networking can help promote the opportunity to participate and link people to a survey site or social networking discussions may help project teams identify valued community resources and priorities. The Loop 1604 (Texas) and Driving 95 (North Carolina) projects utilized online surveys for data collection.
Receive comments	Two-way	Social media can be used to receive both formal and informal comments during a NEPA study. It is important that the NEPA project team decide, in consultation with legal counsel and federal agency representatives, whether social media comments will be part of the project record. Regardless, social media sites can be a source for early and ongoing input on various aspects of a NEPA study. Many projects, such as Loop 1604 (Texas) and Westside Subway Extension (California), referred people to other sources for formal comments but actively invited users to post comments on project social media sites.
Engage stakeholders	Interactive	Social media can be used to build an online community of stakeholders engaged in the NEPA decision-making process. As an interactive forum, social media participants respond to each other and do not necessarily rely on the project team or agency representatives to keep the conversation going. Los Angeles MTA and Missouri DOT noted their desire to allow participants to respond to each other and considered it a mark of successful online engagement.

### **Social Media Tools Selection for NEPA Public Involvement**

As confirmed in this NCHRP research, NEPA project teams are generally using social media to supplement other forms of public involvement. Social media does not stand alone and does not negate the need for traditional outreach tools such as public meetings, workshops, stakeholder committees, grassroots outreach and hard copy information materials, such as fact sheets and comment forms.

A matrix of social media tools prepared as part of the NCHRP 25-25 Task 80 research is available online-- [www.NEPAandSocialMedia.com](http://www.NEPAandSocialMedia.com) -- and is organized by seven types of social media platforms: social media monitoring; blogs and publishing; polling and surveys; social networking; photo and video sharing; aggregators and data tracking; and collaboration sites and crowdsourcing. A brief overview of each type is described below.

A consideration that crosses all tools is whether the project will set up a project-specific page or utilize the agency's brand identity for social media interaction. If the NEPA project team intends to have robust conversation, it is best to establish a project-specific site to engage stakeholders directly interested in the project. If the project team intends to use social media only occasionally to share information or notify the public, utilizing an existing agency account may work and even be preferable as a way to tap into the agency's overall reach.

### *Social Media Monitoring*

Several platforms are available to monitor the internet for information about an agency or project using key words. Even if the project is not going to engage in proactive social media outreach, it is wise for project teams to monitor what is being said online, just as a project team might monitor local news sources for stories about the project. Simple examples of social media monitoring are Google Alerts, RSS feeds and keyword searches in the applications themselves or use of free social media management tools like HootSuite or TweetDeck which allow saving keyword searches. There are other more sophisticated programs and paid services to aid in monitoring online dialogue across one or more social media channels.

### *Blogs and Online Publishing*

Many options exist for publishing information online in accessible formats that have an option for allowing reader comments. When using blogs or other online publishing, the project team will need a plan for promoting the site in order to generate traffic. Most blogging sites have built-in analytics that allow authors to view how many people have seen a given post and provide an option for administrative approval of comments. Even if project teams are not using blogs or online publishing for interactive comments, NEPA project teams may want to explore online publishing as a method to make information accessible in today's digital communication climate where reading on mobile devices including smart phones and tablets is becoming common practice.<sup>1</sup> Example tools include Wordpress, Blogger, Flipboard and Flipsnack.

### *Online Polling and Surveys*

Although NEPA is a decision making process that is not a vote, polling and surveys can be conducted on specific topics or resource areas to support the NEPA decision-making process. Several online services exist to easily build and distribute online surveys as a method to evaluate public perceptions on specific topics or gain input regarding preferences between a variety of options. Polling and surveys can be an educational outreach tool, as well, as the survey process may require sharing relevant background information and may lead the user through a thought-process of consequences and trade-offs between

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<sup>1</sup> 34 percent of American adults own a tablet computer according to the 2013 Pew Internet and American Life study, up from 3 percent in 2010: <http://pewinternet.org/Commentary/2012/February/Pew-Internet-Mobile.aspx>.

various options under consideration. Surveys must be carefully crafted and should be pre-tested to ensure questions gather the data desired by the project team. Survey Monkey, PollEverywhere and Textizen are examples of online polling and survey platforms that have reporting functions that display the results in real-time. Other vendors can be paid for additional sophistication or assistance in crafting survey questions; many collaboration website developers include polling functions in its range of tools.

### *Social Networking*

Social networking refers to the most prevalent forms of social media such as Facebook, Twitter, LinkedIn, Pinterest, Instagram and Google+. They provide spaces for virtual gatherings of people with common interests and allow multi-directional, interactive conversations. Establishing agency or project presence on a social network allows it to be part of the public conversations that are taking place. It also provides ready access to potentially thousands of stakeholders who are already on a given social network. A drawback of utilizing popular social networking sites is that the project is subject to changes in format or policies of the site. For instance, when Facebook shifted format from groups to pages, the Westside Subway Extension (Calif.) project had to run two sites for a while and request their followers to “like” their new page. Similarly, when Facebook changed its algorithms for sharing among members, project teams were no longer guaranteed that all users who had “liked” the page would actually see the project’s post come up in their feed unless they paid a nominal fee for a “promoted” post.

### *Photo and Video Sharing*

Several social media platforms are dedicated to sharing photos and videos. Although some sites may be treated as online storage or cataloguing, most visual platforms have comment capabilities and can tell a relevant story in a visual way when used well. Many also have “tagging” capabilities that can then be used in search functions. YouTube, Flickr, Instagram, Vimeo, ShowYou and Pinterest are example sites that people use for photo and video sharing. These sites can be more effective when enhanced with other social media or online activities such as cross-referencing with Facebook, Twitter or a project website. The latest video-sharing platforms are designed for mobile application use with a focus on brevity and simplicity. Twitter’s Vine limits a video to six seconds and is easily shared on social networks.

### *Aggregators and Data Tracking*

A growing number of online service providers offer ways to track information on the internet with special attention given to social networks and other interactive forums. Some of the tools are free of charge and others might have a fee associated with its use. Aggregators and data tracking sites provide user statistics such as gender, age group, location, time of day and day of week of peak use, and number of clicks on a particular post or link. Tracking statistics becomes more useful as the project team gathers information over time and works to interpret shifts in activities and interests. Example aggregators and data tracking services include TweetDeck, HootSuite, Buffer and Klout. These tools can help the project team assess the effectiveness of social media outreach on other platforms such as Facebook and Twitter.

### *Collaboration Sites and Crowdsourcing*

Another option for online interaction is establishing a collaborative website. Several companies provide ready-made templates for creating password protected sites where stakeholders come to specifically

engage in conversations pertinent to the project. This allows the project team to have a high degree of control over the format and content of the site. Members of the site can be limited to those who are invited; for instance, it could be used to support a stakeholder group or community advisory committee that meets throughout the NEPA process. Or, it can be opened up to members of the general public where anyone can register as a user and participate in online dialogues, surveys and other collaborative activities. For some projects, such as Metro I-70 (Missouri), the collaborative website serves as the project website. In this case, other social media tools such as Facebook and Twitter are used to invite users to the site; thus, social networking is used to share information, but interaction and engagement with stakeholders is referred to the collaborative website. A variety of vendors provide templates, web hosting and support for collaboration sites and crowdsourcing such as Granicus, Open Town Hall, MetroQuest and MindMixer.

Ultimately, the selection of tools should be based on the public involvement goals and objectives. Consideration of stakeholder demographics and accessibility of the internet will also factor into the selection of social media tools.

### **Social Media Policy: Agency Guidelines for Social Media Implementation**

Before engaging in social media outreach, NEPA project teams should consult agency communications staff to understand how project social media accounts or interactive sites fit with other agency online activities. Established by the agency, a social media policy outlines intended use, who has authority to represent the agency, create accounts and manage accounts; and provides guidelines, rules and regulations for projects and initiatives within the agency in order to have a coordinated effort and consistent online presence.

Because using social media for public involvement during planning and environmental phases is fairly new, the NEPA project team may need to discuss the interpretation of the agency's policies with communications staff and executive leadership. Importantly, in order for social media to be a successful public involvement tool, the project team needs the flexibility to be social. In part, this means that posts should tend to be written in an informal tone with a human voice.<sup>2</sup> Posts also need to be interesting and relevant to the audience the project is trying to reach, which means that not all posts are necessarily going to be directly related to the project or agency. Taking a step toward interactive communication may require expanding definitions within existing policy and talking with agency officials about the degree of interactive discussion they are willing to support.

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<sup>2</sup> The 2013 AASHTO social media survey noted a shift in tone and a growing number of transportation agencies discovering the effectiveness of a more informal, human voice. A quoted survey comment read: "We used to be very rigid and formal in all our responses. Now, we're trying to humanize the feed. We ... answer the feed as people (saying I and we) instead of an agency (DOT says...). It has helped tremendously and we've received really good public feedback!"

If a social media policy does not exist at the agency, the team should confirm logistical support as well as public communication expectations that apply department-wide to make sure social media outreach aligns with the agency’s goals and has adequate support. Basic considerations include:

- Ability to implement social media and comply with Information Technology policies;
- Knowledge and ability of staff regarding social media;
- Access to social media sites by agency employees in order to participate;
- Availability of staff resources to manage social media; and
- Support for appropriate training or hiring skilled staff to implement social media outreach.

Social media is quickly becoming a standard communication tool that blends the public forum of traditional newspapers with the personalization of email. It is prudent for agencies to have a policy in place to address how to use it as a significant interface with the public.

### **Social Media Protocol: Process Considerations for the NEPA Project Team**

A second key document is a protocol for implementing social media. Established by the project management team with communications staff input, a social media protocol can provide an outline of roles and responsibilities, workflow and approval processes for proactive and reactive posts. It can establish expectations for timing, tone and how online activity will be documented in order to effectively manage a project social media account.

#### *Roles and Responsibilities*

The protocol should establish who manages social media accounts for the project. A member of the project communications team can be designated as responsible for monitoring social media discussions, designing proactive posts and preparing responses to users’ posts. They will interface with other project team members to gather and verify information on a variety of topics. It is particularly important that the social media manager understand the nuances of media relations, as reporters and other news sources regularly follow social media accounts for government agencies and projects. Every post is a mini-news release and should be treated with the expectation that it could generate a story on the topic.

The social media manager should be able to designate others on the team to post in the absence of or at the direction of the primary manager. Social media can easily be managed remotely on a mobile device, but it is important that multiple staff members have capabilities to post and share on social media sites as back-up. Other project team members need to support timely response on a variety of topics. Phone calls and emails from social media staff tend to involve the same time-sensitive importance as media calls.

#### ***Protocol Checklist***

- ✓ *Roles and Responsibilities*
- ✓ *Time Commitment*
- ✓ *Workflow and Approvals*
- ✓ *Timing and Tone*
- ✓ *Justification for Comment Removal*
- ✓ *Crisis Communication Plan*
- ✓ *Feedback to Project Team*
- ✓ *Documentation Process*

### *Time Commitment*

Project social media requires daily attention. A skilled social media manager can monitor online activity using a variety of tools with designated key words related to the project. Based on case study interviews and project experience, social media staff can expect to spend 1-2 hours a day at start-up followed by 30-60 minutes a day for an experienced social media manager on a well-established project. Aside from this planned time, social media staff should have flexibility to prepare responses with unpredictable timing. The social media manager needs to use good judgment in determining how to use existing approved material and when posts need to be elevated for approval (see *workflow* below). The time needed to gather new information and gain on-the-fly approvals can be mitigated with good planning anticipating key topics of interest to stakeholders. It is important that the project social media pages are accurate and speak with authority. Some situations will require altering plans for the work day in order to address an unanticipated topic or crisis. Because workflow is unpredictable and can fluctuate based on a variety of circumstances, time estimating is best achieved with an allotment of hours per week that can be adjusted based on the demands of social media interaction over time.

### *Workflow and Approvals*

The dynamic nature of social media can be addressed by creating a weekly planned posting log and other tools that mitigate the unpredictability of online comments. Rather than sending planned posts for approval on a daily basis, the social media manager can prepare a weekly outline of planned posts for review and approval. Planned posts can draw from existing public involvement materials and seek out other relevant information in advance.

Based on the level of social media activity and the community context of current events, the social media manager should have the freedom to alter planned posts or make additional posts. For instance, when a natural disaster occurs, planned posts might be supplemented or replaced with a post like “Our hearts go out to Monroe, Oklahoma.” Posts that show emotion and concern for the community ought to be acceptable based on the local context (see *tone and timing* below).

The project team should discuss who approves planned posts and when content needs to be elevated to the project manager. If posts are based on approved project messaging developed with the project manager, a communications manager is likely appropriate to approve the weekly posting log. Topics that go beyond previously approved messaging likely require input from the project manager or other technical staff. The project manager may want to determine how hands-on he or she wants to be with regard to the social media outreach. The level of the project manager’s involvement should be consistent with how he or she approaches approvals for other public involvement activities. If the communications team is trusted with response to emails and phone calls, they also likely can be trusted to respond on social media.

Approvals for response to users’ online posts should be addressed in the protocol. The protocol can outline under what circumstances social media staff can respond without additional approval and when reviews and approvals are needed. As noted above, the unpredictability of social media comments can be mitigated with good planning. Social media staff should be familiar with all approved public materials such as basic project descriptions, frequently asked questions and fact sheets. Repurposing project information for social media is one strategy to maintain a consistent message and provides a good resource for material to post in response to online dialogue.

Due to the time-sensitive nature of social media, however, the project team should anticipate the range of comments, questions and topics that could be discussed on social media before launching social media sites. As resource material for responding to online posts, the team can develop a statement and some supporting facts for each anticipated topic. These are approved reactive messages, not intended to be proactively shared, but vetted for use in responding to posts if particular topics come up.

At the start of the project, the team should have frequent interaction and discussion about content and err on the side of gaining approvals. Once the workflow is established and a level of trust is developed, the number of approvals may be reduced; however the various stages of the NEPA study and fluctuation of changing conditions require that social media staff stay in regular contact with other aspects of the project team.

### *Timing and Tone*

The social media protocol should outline the frequency of planned posts, expectations for timing of comment response and example source material and posts in order to demonstrate the expected range of topics and tone of posts. The frequency of planned posts will depend on the complexity of the study and how robust the project team wants social media interaction to be. Concerns about bias or predisposition of the project team can be mitigated by posting regularly on a variety of topics related to the NEPA study. Although no single social media post can contain “complete information” to the extent of a formal published document, a steady stream of daily nuggets of information can demonstrate the range of topics being addressed in the NEPA process. If the project team cannot sustain content material for daily posts, two to three posts a week can show followers that the project team intends to actively engage users on the social media site.

In addition to determining the frequency of planned posts, the project team needs to determine the expected response time to users’ posts. Social media is designed for real-time interaction and a 24-hour response time is standard. Depending on the topic and content, responses might be posted within minutes or hours; or, in some cases, the response post might acknowledge the comment within 24 hours, but then require additional research and approvals for a more detailed response later. The key is to identify an expected standard time for response and readily acknowledge when specific posts should be treated as an exception.

Timing for response to posts may also change depending on the stage of the NEPA study as well as the nature of interactive discussion on the site. Part of the social media manager’s job is to learn when to watch and listen, allowing interaction between users rather than responding immediately.

The type of social media posts, including tone – or voice – of the posts, can also be addressed in the protocol. The project team should discuss the level of formality or humor that is acceptable, working to strike a balance between a professional voice that represents the credibility of the project team and a friendly voice that invites discussion and speaks in plain language. The best way to describe the team’s approach to acceptable tone is to include several example posts in the protocol to demonstrate the range of topics and expected level of formality or informality. The agency’s social media policy may already contain guidance and examples related to tone.

The protocol can outline the range of topics and source material for planned posts and responses. In order to be effective, social media sites need to share information of value to users including

information that is not directly related to the project or agency. Sharing other types of information builds goodwill and provides a sense that the project team is part of a larger community that cares about local events, sports teams, weather and other local interests. Again, a perception of unfairly advocating a particular organization, business or event is mitigated if the site shares generously and makes this type of content a regular part of its planned posts.

Part of identifying source material and the range of topics for posts is creating guidelines for who the project will follow on sites like Twitter and Facebook or actively seek to engage in the case of collaborative websites. Start with project partners and identifiable stakeholder organizations. Following these entities or inviting them to participate in a specific online platform notifies them that the project social media site exists. Following a broad base of users also provides content to share and contributes to understanding the community. Social media analytics can help identify what types of posts are most viewed and liked by the site's users (see *evaluation measures* under the social media strategy section).

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The social media protocol outline of representative posts, topics and sources for posting material should not be viewed as a comprehensive or prescriptive list, but as a starting point for the team to agree on the social media approach.

### *Justification for Comment Removal*

A key concern for many project teams venturing into social media is how to address negative comments, misinformation and inappropriate comments. Negative comments and misinformation will be discussed under the communication strategy since it addresses messaging and content, but it is important to note that allowing negative comments is necessary to demonstrate transparency and willingness to listen. Removing or being overly sensitive to negative comments will undermine the credibility of the site and affect its value as a NEPA public involvement tool.

The key protocol to include in the process document is a clear definition of what constitutes an inappropriate comment that justifies removal from the site. This portion of the social media protocol can detail who determines a comment is inappropriate by what standards and what actions to take.

It is standard social media practice to remove comments with foul language or threatening remarks. As staff at the Missouri DOT stated, "Keep it clean and kind." Los Angeles MTA's strategy for follow-up after removal of an inappropriate comment is a model for communicating that the stakeholder is still welcome to participate on the site. Los Angeles MTA sends an email or direct message to the person who made the inappropriate post letting them know it was removed. Along with this *acknowledgement*, they invite the user to repost their thoughts using different language.

Judgments about distasteful humor can be vetted out through discussion with members of the project team. The Maryland Transit Authority described having regular conversations about posts in questionable taste, striking a balance between removing offensive content and allowing users to speak

in their own voice and vernacular. They described having a healthy debate about whether a specific post is abusive or contains a personal threat. If references are general and reflect accepted local cultural references, they leave it up.

### *Crisis Communication Plan*

Social media can be used to quickly disseminate information in a crisis situation. The team can consider what constitutes a crisis situation and identify the team members who need to collaborate on strategy and messaging when an unexpected event occurs that has implications for the project. A complex, multi-year NEPA study may have a crisis communication plan in place and social media can be included in the tools detailed within that plan. Addressing the risk of misinformation or social media sites being hijacked by an individual or interest group will be discussed in the social media strategy section as it pertains to content and messaging.

### *Feedback to Project Team*

The social media protocol can detail how the social media manager will communicate online interactions and activities with the broader project team. Summarizing the content of posts for the project team provides value to the overall public involvement effort and input to the NEPA decision-making process. Outline the frequency with which the social media manager will provide feedback to the project team; depending on the complexity and stage of the study, it might be weekly, monthly or quarterly. A content analysis of general themes and concerns with example posts illustrating common comment topics is a practical way to share this information.

Working within the communications and public involvement team, it is valuable to compare the tone and topics of social media discussion with other methods of public input to check for consistency. If a new topic emerges online, it may indicate reaching a new audience who has not previously been engaged or a new issue that has not been vetted out in the NEPA process. Social media can serve as a real-time feedback mechanism to make sure key issues are addressed and that project messaging is understood.

### *Documentation Process*

A significant topic in the social media protocol is documentation of online interactions. The team should consult with legal counsel regarding whether to retain all or selected interactions in the project file. There is currently no federal guidance regarding the protocol for documenting and responding to social media posts, although **NCHRP 20-06 Study Topic 19-04, *Transportation Agencies' use of Social Media*** is engaged in ongoing research regarding legal considerations for social media sites sponsored by transportation agencies. From a communications viewpoint, the inclusion of social media posts in the project file depends on the purpose for using social media as part of the public involvement process. If social media is being used for one-way communication and there is little interaction, it is good to document the reach of social media followers as part of the public notification process, but there is minimal need to document posts as formal comments in the NEPA process.

Several project teams interviewed as part of this NCHRP research indicated that they utilize social media as a space for informal discussion and they redirect users to an online comment form or specific email address for formal comments. With this approach, social media serves as a “rehearsal” for formal

comments where users learn about the project, ask questions and test their ideas among their peers before formulating a formal comment. Just as NEPA project teams often meet with resource agency representatives to build project understanding and grasp overarching concerns in informal dialogue prior to the agency submitting a formal comment letter, social media can serve as an interactive space for discussion prior to submitting separate formal comments. If using this approach, the project team should consider providing a disclaimer or statement of user guidelines on the social media site in such a way that it does not deter discussion and participation. (Also see discussion of the *disclaimer* in the strategy section.)

Regardless of whether social media is included in the project file, the project team should maintain a record of planned posts and user interactions. Some aggregating services are able to provide this documentation or the communications team may keep a social media posting log by copying and pasting the information into a table format with a date and time stamp. Some social media sites, such as Twitter, will archive posts upon request. The social media site Storify is designed to organize social media posts from various platforms into a story. Guidelines for documentation may also be contained in an agency's social media policy and used as starting point for a NEPA project team.

### **Social Media Strategy: Communication Plan for Audience, Message and Evaluation**

The social media strategy outlines a plan for defining audiences, developing messaging and content and evaluating results. Established by the project communications team as a subset of the overall public involvement plan, the social media strategy is a communication plan for utilizing social media to engage the public in the NEPA decision-making process.

#### *Audience*

Defining the audience for social media outreach can help the project team select appropriate social media tools and develop an effective approach. It is important to note that the increasing utilization of mobile devices and wireless networks has introduced the opportunity for minority and low-income groups to be more engaged with online outreach methods.<sup>3</sup> Although this NCHRP research process did not find documented use of social media to specifically support environmental justice outreach, it is possible that for some projects social media might be an effective tool to engage traditionally underserved populations. For example, a new toll facility project in California has utilized a social media strategy to reach Spanish-speaking and bilingual audiences with some measurable success.

**Strategy Checklist**

- ✓ Audience
- ✓ Messaging and Content
- ✓ Evaluation

Knowing the intended audience is critical to developing an effective brand identity, building relevant followers and successfully encouraging engagement. Implementing social media might be different depending on age group, gender, cultural group, race or ethnicity. If you know who you are trying to reach, the project

<sup>3</sup> See <http://www.pewinternet.org/Commentary/2010/September/Technology-Trends-Among-People-of-Color.aspx> 2013 research by the Pew Internet and American Life project shows that 91 percent of American adults own a cell phone and 56 percent own a smart phone. See <http://www.pewinternet.org/Infographics/2013/Cell-Phone-Ownership.aspx> and <http://www.pewinternet.org/Reports/2013/Smartphone-Ownership-2013.aspx>

team can more readily hone in on topics, messages and develop a project “personality” that resonates with the audience. Building a following also depends on engaging relevant organizations and opinion leaders; sharing information from credible sources within the community; and building trust with users through timely and accurate responses.

### *Messaging and Content*

Once the intended audience is clearly defined, the communications strategy can focus on the message. Messaging on social media should be consistent with messaging across all public involvement tools. Messaging is a process by which the communications team works with the project management and technical staff to determine how to best describe the project in understandable terms. Providing good information to the public about the NEPA process and relevant facts help facilitate meaningful participation in the decision making process. The NEPA public involvement lead can work closely with the social media manager to ensure that messaging is consistent and appropriate.

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**User guidelines or disclaimer.** One of the key messages unique to social media outreach is communicating how the project team is using social media tools. This is often summarized in a short statement that can be posted in a social media profile and can be labeled “user guidelines” or a “disclaimer”. Since disclaimers sometimes have a negative connotation and tend to focus on what is not acceptable on the site (including a definition of inappropriate comments subject to removal), it may be more productive to positively state how the NEPA project team is utilizing the social media site. Examples might include:

- To share information and answer your questions;
- To gather information and input; or
- To engage in dialogue.

The user guidelines or disclaimer can clearly state whether social media interactions are included or not included in the formal public record for the NEPA process. The decision of whether to include social media posts in the project file should be made by the project manager with input from legal counsel. Once that decision is made, it is up to the communications team to convey it appropriately.

**Promise to the public.** The user guidelines or disclaimer also makes a promise to the public<sup>4</sup> about how the social media site will engage with stakeholders. In order to build trust, the project team should deliver on its promise in terms of fulfilling the stated purpose for public involvement using social media. A key distinction that should be clearly stated is whether the primary function of the social media site is one-way, two-way or interactive communication.

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<sup>4</sup> The IAP2 Public Participation Spectrum notes an implied “promise to the public” based on the level of outreach and communication about how public input will be used in a decision making process. See <http://www.iap2.org/associations/4748/files/spectrum.pdf>

Another important aspect of the promise to the public is communicating how information discussed on

*Regardless of whether social media is included in the project file, the project team should maintain a record of planned posts and user interactions.*

social media will be addressed in the NEPA decision-making process. It should be noted that although there is no federal guidance regarding the handling of social media interactions in the project file, there is no rule against allowing social media comments to be part of the record. In the spirit of transparency and inclusiveness, some believe that social media comments should be part of the public record. Regardless of whether social media posts are included in the project file, the project team should be prepared to demonstrate how online interactive discussions contributed to the study process. Just as a key part of holding effective public meetings is following up with attendees about how their input was used, the virtual community engaged in social media also wants to know how their input is being used.

**Integration with other outreach tools.** The effectiveness of social media outreach can be amplified by integrating it with other tools. Repurposing project messaging, graphics, photos and charts creates project efficiency, helps with consistency and allows stakeholders to engage with project information at their convenience. Information presented at a public meeting can be shared online for ongoing discussion and reaching additional stakeholders. Questions posed at a workshop can be posted to the social media page for additional discussion and reactions from followers – in real time if desired. Survey links, draft documents and comment forms can be linked from social media pages to increase awareness of public involvement opportunities. Likewise, project social media sites can be promoted at public meetings, workshops and within other outreach tools so that stakeholders are aware of participation opportunities online.

Various social media tools can also work together to better accomplish public involvement goals. Note that the tools matrix identifies social media tools that can enhance or be enhanced by other tools. For instance, photos shared in an Instagram account can be posted to Twitter, Facebook and Pinterest. Links to a YouTube video can be shared via these media, on a project website or on a password protected collaboration site. Social media has many forms and an outreach campaign might be strongest by tapping into several platforms for a multi-media approach.

**Off-topic conversations, negative comments and misinformation.** A unique aspect of social media is the layering of conversations over time and the ability for users to talk to each other by commenting on each others' posts. Social media has the potential to be a multi-vocal forum for interactive discussion. There will be off-topic conversations and posts that do not make sense. There will be criticism of the project, technical work, process and sponsoring agency. Similar to a workshop with people seated at multiple tables to work on a common problem, there is going to be some discussion and opinions about the weather and community events. Another analogy is that social media pages are gatherings of people with common interests, similar to a group of regulars who gather at the local coffee shop.

As a result, negative comments will most certainly occur. A negative post can turn into a positive conversation based on how the project team responds; a disgruntled stakeholder can change his or her attitude when he or she feels acknowledged and heard. Furthermore, the NEPA public involvement process seeks out public input, which commonly comes in the form of negative statements. The difference with social media is that the project team can quickly acknowledge the issue and respond with information about how the concern is being addressed as part of the study. Negative comments are a valued part of NEPA public involvement. They offer the project team an opportunity to better understand their constituents.

Misinformation is another common concern. This is a growing issue whether the project chooses to implement their own online social media tools or not. The fact is, the conversation about the project will occur online with or without the project team participating on social media sites. Although project teams often discuss the risks of having a social media presence, the team should also consider the risks of not participating in social media sites. These are strategic decisions that must be made early based on

demographic analysis and research. Misinformation posted by the public can proliferate across the internet quickly using social networks, damaging an agency and project reputation quickly. When uncertain about the level of potential consequence, the social media manager should consult with the public involvement manager and project manager for guidance.

A first step to addressing misinformation is to evaluate whether a social media post with incorrect information has negative consequences to the project process. A typo or slight oversight may not have any consequence and can just be let go in the flow of a social media feed. If a social media post clearly has misinformation that has consequence to the public perception of the project, there are several approaches to consider. One is to watch the post for awhile to see if other users correct the misinformation. Regular users familiar with the project are often quick to correct misinformation. Another approach is to directly engage known regular participants in sharing their thoughts and reactions to the post. This can be done in a comment on the post tagging or naming regular participants, inviting them to comment on the post. In some cases, the social media manager may want to directly correct the information by sharing a link or fact; but this should be done with tact and respect.

A case where misinformation was generated in a Twitter feed by a large daily newspaper in a metropolitan area can serve as a good example of how to quickly correct a potential social media backlash. In this example, the social media manager saw through normal keyword monitoring an important project fact incorrectly stated by a newspaper on Twitter. The social media manager alerted the project manager and together they drafted a 400-word “notes” post created in Facebook. Within three hours the note was posted on the project’s Twitter and Facebook pages, an “@ reply” sent to the newspaper with the link to the note, and more “@ replies” sent to individuals who retweeted the original incorrect newspaper Tweet. Significantly, the newspaper retweeted the correction, sharing it with all their followers. Acting quickly prevented the newspaper from posting the incorrect information

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on their Facebook page, so in a strategic decision, the project decided not to directly post to the newspaper site. The result was that no further dissemination of the incorrect information occurred.

Ultimately, building an engaged community of social media users from the start of the NEPA process can help mitigate misinformation. If the project fosters interaction and sharing, the online community will develop trust and a strong community network. The more regular participants are already familiar with project facts and processes, the more equipped they are to respond when misinformation occurs. In addition, the more activity on the project social media page, including sharing more than just project information but also community information as noted above, the more a misinformed post is a blip in the social media feed during the course of a day.

Given the limitations of a public social media site, the team also could establish an online collaborative site with its own log-in and user profiles. This allows the project team to have more control over the design and functionality of the site and creates a more controlled space for detailed and purposeful discussion. Participants log-in to the site to specifically engage in discussion about the project. The trade-off of setting up a separate collaboration site is that the communications team will need to invest more effort in raising awareness and promoting use of the site, whereas Facebook and Twitter already have thousands of users.

**Anti-project social media campaigns and misinformation on other sites.** Social media can be a new space for organizing project opposition; an individual can create their own group and recruit hundreds of members in a matter of hours. Such opposition groups can fizzle as fast as they grow unless there is substance behind it. Social media users quickly see through unsubstantiated claims. At times, it is best to take a contentious interaction off-line and invite the user to call the project public involvement team or set up an in-person meeting. If the opposition group continues to grow and has a presence over time, it may be an indication that one individual's concerns are shared by many. Such concerns have hopefully already been heard in other aspects of the NEPA public involvement process, but if not, the social media opposition campaign can be a catalyst for better understanding the stakeholder group's interests and concerns.

The social media manager can monitor discussions of the NEPA project on other social media sites, as well. This social media "listening" is crucial; it should start early in the process and be incorporated in the public involvement process whether the project eventually creates social media pages itself or not. If misinformation is shared on a site not hosted by the project team, the project social media page can be used to introduce correct information and invite people to participate in the NEPA process. In other cases, it may be best to simply note the misinformation for the project team so that project messaging can be adjusted accordingly. Deciding what approach to take depends on a variety of contextual factors including stakeholder influence and reach, whether the misinformation is perceived as an oversight or intentional and other factors, such as recent media coverage.

A key to keeping the peace on social media is to develop brief "comment guidelines". This is standard practice for many agency project social media sites. The comment guidelines are typically vetted through legal counsel and similarly applied in other public involvement efforts.

Finally, if the project team implements social media as part of its outreach, it is important that the project "owns" its own pages. "Owning the page" means not letting abusive or otherwise inappropriate posts overtake the page. Guidelines for taking charge of the page include:

- Disagree when necessary;
- Be diplomatic when necessary; and
- Ask people to behave better when necessary.

If someone uses an expletive or makes a personal attack, call them out, tell them it's not acceptable and give them an opportunity to correct the behavior. This approach assures others that the social media site has a presence and a personality; in short, it's about treating online interactions with the same courtesy and respect as in-person interactions. At an extreme, social media managers can block users from sites who continue to demonstrate bad behavior or do not follow the comment guidelines.

### *Evaluation*

A complete communications strategy includes a plan for evaluation measures. Project teams can consider what data they want to track over time so they can start that process from the first day social media sites are launched. Common data to track include number of followers; number of posts; rating posts as positive, negative or neutral; and number of clicks on links. In addition to numerical data, social media posts by users provide real-time feedback on project messaging and the public involvement process.

Several project teams using social media during NEPA studies use demographic and geo-spatial information to evaluate where project participants reside. This in turn allows the project team to identify areas where participation is lacking. For the Missouri DOT, this analysis helped them identify where they needed to increase grassroots efforts to more fully engage groups that they did not see participating online.

An increase in social media activity can be sparked by a media story or other outreach happening as part of the project. If the public involvement team cannot identify what has caused a spike in participation, it may be a sign of outreach from unofficial sources. Changes in social media trends signal a change in something happening within the project or community of which the public involvement team should be aware.

One of the advantages of social media is that it has built-in analytics that make measurement easier. The challenge is to decide what measures have value. Online tools are about engaging people, and social media measurements should reflect that goal. In addition to tracking the number of people who "like" a Facebook page, qualitative evaluation can look at who is sharing your information on their page and how many comments are posted in response. Monitoring what gets shared serves as a good indicator of the type of information the site's users prefer.

Finally, it is valuable to document instances of social media contributing to the NEPA decision making process. Whether it is documenting an increase in public meeting attendance or obtaining higher quality content in public comments, anecdotal stories help build understanding of how social media outreach contributes to the public involvement process.