



U.S. Department of Education

Digital Guidebook

Updated May 2016

Table of Contents

U.S. Department of Education Digital Engagement Guidebook	2
PART I - Overview.....	2
Overview.....	2
Platforms Approved for ED	3
Websites/Web-embedded Services Approved for ED.....	3
Social Networking Sites Approved for ED	4
Blogging.....	5
Obtaining an Official Blog or Minisite:	5
Comments.....	6
Newsletters.....	6
PART II - Forming Your Communication Plan	6
PART III - Selecting a Platform and Blogging.....	8
Platform Details	8
Blogging.....	9
PART IV – Obtaining an Official Account.....	11
Obtaining an Official Twitter Account.....	11
Obtaining an Official Facebook Page.....	12
PART V – Best Practices for Posting.....	13
PART VI – Contact Information.....	14
Part VII – Standard Disclaimer.....	15

U.S. Department of Education Digital Engagement Guidebook

Web-based services and social media are essential to how the U.S. Department of Education (ED) serves citizens and does business in the 21st century information economy. Web services, blogs and social media enable the Department to share information in a variety of formats (text, videos, photos, graphics) directly and in real time to engage a wide audience. Digital engagement, much like traditional communications, can be used to promote ED's mission and vast resources, both to the general public and to targeted stakeholder groups.

PART I — Overview

Overview

The ED Digital Engagement Guidebook provides official guidance to offices in their use of social media and related tools, including, but not limited to:

- Websites/web-embedded services
- Social networking sites
- Blogs (including commenting on official blogs)

This guidebook contains information about digital engagement policies, best practices, and recommendations. This is a living, official document, which will undergo edits on a frequent basis. Collaboration from principal offices is encouraged, and those interested in engaging with their constituents via social media should contact Dorothy Amatucci, digital engagement strategist, in the Office of Communications and Outreach (OCO), via email (dorothy.amatucci@ed.gov).

This guidebook was written with both [ED Social Media Policy](#) and [Terms of Service \(TOS\) Agreements](#) in mind. The ED Social Media Policy outlines specific rules for the use of social media at our agency. The most up-to-date TOS Agreements outline which social media applications ED employees legally can use. All information about digital communications at ED can be found on the [Digital Strategies page on ConnectED](#).

Before embarking on the use of any social media as an employee and representative of the Department, all ED employees are strongly encouraged to familiarize themselves with and understand both the ED Social Media Policy and all current TOS Agreements.

Questions and comments about information contained in this document may be directed to Dorothy Amatucci (dorothy.amatucci@ed.gov).

Platforms Approved for ED

ED has federal-compatible Terms of Service (TOS) Agreements with a variety of digital platforms. Federal-compatible TOS Agreements are special agreements negotiated between the federal government and vendors who offer free social media, mobile, business and other digital tools. These [federal-compatible TOS Agreements](#) allow federal employees to legally use these tools. Additional information about the importance of federal-compatible TOS Agreements can be found on [GSA's Federal-Compatible Terms of Service Agreements page](#).

ED has TOS Agreements with the following platforms:

- Facebook
- Flickr
- Google Analytics
- Google - Android Applications
- Apple App Store
- LinkedIn
- MySpace
- Twitter
- YouTube
- Yammer

Details about all ED TOS Agreements and whom to contact with questions concerning platforms not found on this list can be found on the [ED TOS Agreements page on ConnectED](#).

Websites/Web-embedded Services Approved for ED

ED's main website, www.ed.gov, is run by OCO's Web Team. Those wishing to make changes or edits to existing web pages should contact the Web Team via email at web@ed.gov.

ED websites may use third-party embedded code, provided that certain procedures are followed:

- **Twitter:** ED allows Twitter feed and list widget embeds; the list or feed owner needs to provide the ED Web Team with the code
- **YouTube:** ED allows YouTube video or video playlist embeds if the video has good closed captioning; if the video isn't captioned or was captioned poorly, then users should link to the video. If the video wasn't produced by, for, or in partnership with ED, a standard disclaimer might need to be included.
- **Storify:** ED does allow Storify embeds in blog posts

All questions regarding embeds should be directed to the Web Team (WEB@ed.gov).

For more comprehensive and detailed explanations of what is and is not acceptable on ed.gov, please reference [ED.gov Management and Publishing Policies](#).

Social Networking Sites Approved for ED

Social networking connects people of all sorts and has allowed for the faster dissemination of information:

- Communication among agencies' official social media accounts can promote cooperation across government.
- Internal social networking sites can establish connections across traditionally stove-piped offices throughout an organization.
- Public-facing social networking accounts also can help to better serve the taxpayer and be used to further promote government information and services.

By using social media, federal agencies and employees can provide real-time information and staff interaction with interested members of the public; this, however, can provide challenges, especially during times of breaking news. This is why all federal employees who use social media are encouraged to familiarize themselves with and follow these rules:

1. Consult the official Social Media Policy before opening an account. Contact Dorothy Amatucci (dorothy.amatucci@ed.gov) to start the conversation about acquiring an official account.
2. Only request to post information that is publicly available on our official website, www.ed.gov.
3. Respond to users' comments only with factual information; do not engage in arguments or debates. Social media sites are not the proper place to engage in debates over policy with members of the general public, members of Congress, state and local officials; or public- or special-interest groups. If you are unsure about how to respond to a comment, contact Dorothy Amatucci (dorothy.amatucci@ed.gov).
4. Make sure that commercial advertising does not appear on any social media site you manage. (See [Prohibition on Lobbying](#) on DigitalGov's *Checklist of Requirements for Federal Websites and Digital Services*.)
5. Always follow the applicable rules pertaining to revealing personally identifiable information (PII) of ED employees and stakeholders the agency serves. (See [Privacy and Identity Management](#) on DigitalGov's *Checklist of Requirements for Federal Websites and Digital Services*.)
6. Work with the ED records management office to determine how social media content should be preserved. For specific questions and concerns, please contact Paul Wood, Studio Team Lead (paul.wood@ed.gov). (See [Records Management](#)

on DigitalGov's *Checklist of Requirements for Federal Websites and Digital Services*.)

Blogging

A blog is a collection of entries or short articles that communicate what is happening in your office or agency. Although blogs are generally intended to read more informally than traditional newspaper articles, they are still considered official government communications and should be treated as such. As with all social media platforms, there are both benefits and risks to posting on a blog.

All principal office blog sites and mini sites hosted on www.ed.gov must be approved by the Office of Communications and Outreach (OCO). OCO will help determine if other offices must be notified or consulted before a specific principal office blog or mini site is created.

All blog posts should avoid areas of potential liability or litigation. A few examples:

- Blog posts cannot appear as though they are an official channel for comments used as part of a **rulemaking process**. If you have questions, connect with the Office of General Counsel Regulatory Services Division, General Deputy Counsel Elizabeth McFadden (elizabeth.mcfadden@ed.gov).
- Blog posts should not appear to **give endorsement**. All blog sites should have a standard, blanket disclaimer to reflect that mentions of schools, organizations, etc. are not an endorsement by ED. Sample disclaimer from Homeroom blog: *Blog articles provide insights on the activities of schools, programs, grantees, and other education stakeholders to promote continuing discussion of educational innovation and reform. Articles do not endorse any educational product, service, curriculum or pedagogy.*
- If you have general questions about disclaimers, connect with the Web Team (WEB@ed.gov). For specific questions, connect directly with the Office of General Counsel Ethics Team (OGC.ethics@ed.gov).
- Avoid using the word “**partner**” in situations where a formal partnership or memorandum of understanding (MOU) has not been signed by ED and the other organization or vetted with Office of General Counsel. If you have questions, connect directly with the Office of General Counsel Ethics Team (OGC.ethics@ed.gov).

If you have general questions on this topic, please connect with the Web Team (WEB@ed.gov).

Obtaining an Official Blog or Minisite:

If you would like to set up an official blog site or minisite for your principal office, you must submit a detailed proposal to OCO for approval. The [Blog and Wordpress](#)

[Minisite Policy](#) details the requirements for having a blog and what your proposal must contain.

Comments

ED's social media accounts facilitate ongoing dialogue about education issues. We encourage comments from the public, but we reserve the right to review and remove comments that violate our [Social Media Comment Policy](#). All ED digital practitioners should be familiar with our [Social Media Comment Policy](#), which is publicly available on www.ed.gov.

Newsletters

ED currently has a contract with the email marketing service [GovDelivery](#). GovDelivery is a mass email communication tool that allows users to easily send email messages and newsletters to groups of constituents. This tool also allows administrators to track metrics such as open rates and click rates. ED employees interested in exploring whether or not their office would benefit from creating a newsletter – or having their messaging become part of an existing newsletter – MUST contact GovDelivery lead Dorothy Amatucci (dorothy.amatucci@ed.gov) before exploring this tool. (Note: A list of ED's current newsletters may be found in Part VII at the end of this document.)

PART II — Forming Your Communications Plan

Communicating can be especially daunting via digital channels. OCO therefore asks all ED employees to think strategically about the 'what', 'why' and 'how' of a potential announcement in plain language BEFORE reaching out to OCO Digital.

OCO Digital recommends ED employees follow this process:

Fill out the follow strategy statement: Leverage [insert your event/message here] to engage [audience-who are you trying to reach?] through [digital channels/medium] in order to achieve [goal]. (*Who are you trying to reach? What do you want them to hear? What communications channels are you going to use to reach them?*)

Suggested Media:

- What platforms do you think your target audience utilize?
(Facebook, Instagram, Twitter, Google+, LinkedIn, Website, Blog, Vine)
- What content would be most effective for your audience and that particular platform?
(Video, Graphic, Blog, Photos, GIFS, Memes, Facebook Live, Google Hangout, Reddit AMA)

Accounts to help amplify — Identify your brand champions who can help spread your message to your target audience

- Identify Relative POC/Initiative/Agency social media accounts and owners: Produce a list of sample social media content e.g. tweets, Facebook posts along with photos/graphics and email the account owners a few days ahead of the event.
- Your ED POC accounts are great, but also think about what other digital presences or accounts resonate with your target audience. Social media is fragmented so identifying and engaging niche audiences is the key to success.

Before Event/Campaign: What messages can you push out (without making news) in advance to introduce the general ideas and themes of the event/campaign? Ensure that your target audience is familiar with the topic before you can make a call to action.

- Twitter: Write out your tweets here. It doesn't have to be an exhaustive list. Allow yourself the flexibility to write up new tweets and react to the moment.
- Instagram: Let the photos do the talking. Tagging different accounts and adding hashtags helps spread and amplify your message.
- Facebook: Write out your Facebook posts here. Facebook's algorithm will push down your content if you post too often or content that doesn't receive likes and shares so think about using your best pieces of content.
- Suggested Tweets: This is where you draft a few sample tweets for your amplifiers to use.

During Event/Campaign: Live tweeting is great but it would also be a good idea to develop media assets (videos, photos, graphics) ahead of time to pull from during the event. For events and campaigns, it is good practice to provide a rich media experience for your audience.

- Twitter: Write out your tweets here. It doesn't have to be an exhaustive list. Allow yourself the flexibility to write up new tweets and react to the moment.
- Instagram: Let the photos do the talking. Tagging different accounts and adding hashtags helps spread and amplify your message.
- Facebook: Write out your Facebook posts here. Facebook's algorithm will push down your content if you post too often or content that doesn't receive likes and shares so think about using your best pieces of content.
- Suggested Tweets: This is where you draft a few sample tweets for your amplifiers to use.

[Optional] Event Recap – This is another way to stretch out the life of your content and tell a story. Create a Storify or a blog post and use your digital channels to point your audience back.

PART III — Selecting a Platform and Blogging

Platform Details

Which platform will best help your office with your communications needs? While you might be familiar with all of the platforms listed above, not all of them might be suitable.

All social media practitioners are encouraged to carefully read the strategy behind each social media platform before considering applying for an official account. Please see Part IV for information regarding posting frequency and other best practices.

Twitter — This platform is perhaps the most beneficial for ED in terms of disseminating messaging. The brief, 140-character format allows for quick, concise, and targeted messaging and media campaigns. ED offices interested in participating in this platform and opening their own accounts are encouraged to work closely with OCO to ensure they are reaching the proper audiences and members of the public. All ED employees are encouraged to familiarize themselves with [ED's Official Twitter Account list](#).

Facebook — The Department of Education maintains a presence on this social media platform, but the return on investment (ROI) on this platform is beginning to change for government agencies. Since federal agencies are prohibited from paying outright for content, some are turning away from Facebook and focusing their efforts on other platforms. The Department of Education continues to maintain a presence on this platform, as it is still one of the most popular social media platforms online, but ED offices are strongly encouraged to coordinate the posting of content relevant to their offices on the main ED page instead of starting their own accounts. ED employees who want to create Facebook posts for the main ED Facebook page should coordinate with Dorothy Amatucci (dorothy.amatucci@ed.gov). All ED employees are encouraged to familiarize themselves with [ED's Official Facebook page list](#).

Instagram — This is an online photo-sharing, video-sharing and social networking service that enables its users to take pictures and videos, apply digital **filters** to them, and share them on a variety of social networking services, such as Facebook, Twitter, Tumblr and Flickr. **To maintain streamlined messaging and proper branding, ED will only maintain one official Instagram account.** Those outside of OCO Digital who wish to share posts on ED's official Instagram should contact Joe Portnoy (joe.portnoy@ed.gov).

Google+ — The Department of Education maintains one page on this platform to disseminate official messages and allow for user interaction with content. Also, one and only one account on this platform allows for a stronger presence and

enhancement of ED's online properties. ED offices that are interested in posting content on this platform should coordinate with Dorothy Amatucci (dorothy.amatucci@ed.gov) to get their messaging and materials posted on the main account.

Flickr — ED uses this platform to house photographs taken at official events by the ED Studio Team. To ensure proper records management, ED only maintains one account. Photographers from the ED Studio Team maintain and upload all images to this account. ED employees with questions about this account should contact Paul Wood (paul.wood@ed.gov).

YouTube — YouTube is a video-sharing website that allows users to upload, view and share videos. Both private individuals and organizations maintain presences on this platform. There is a main [ED YouTube channel](#), which is managed by the Studio Team. ED offices interested in starting their own YouTube channel should coordinate with Joe Portnoy (joe.portnoy@ed.gov).

LinkedIn — LinkedIn is a business-oriented social networking service. ED maintains a presence on this platform to communicate student loan and job-related information to users. It is highly recommended that ED maintain only one official presence on this platform and that any POC or Initiative that wishes to post information coordinate with Dorothy Amatucci (dorothy.amatucci@ed.gov).

GovDelivery — GovDelivery is a mass email communication tool that allows users to easily send email messages and newsletters to groups of constituents. This tool also allows administrators to track metrics such as open rates and click rates. ED employees interested in exploring whether or not their office would benefit from creating a newsletter, or having their messaging become part of an existing newsletter, MUST contact GovDelivery lead Dorothy Amatucci (dorothy.amatucci@ed.gov).

Blogging

ED's official blogs are important tools for sharing the Department's accomplishments and successes.

The [Homeroom blog](#) is ED's main official blog and allows the department to tell the stories that often don't get covered in traditional media. As readership continues to grow, it is important that all blog posts align with the mission of the department.

While some offices have their own blogs, ED's Homeroom blog currently has the highest readership and ED employees are encouraged to submit posts to this outlet after consulting with OCO Digital. It should be noted that, while the work of the Department is important, not all of it is suitable for a blog's audience and may not pass OCO's internal approval process.

Blog posts need to be concise (no more than 550 words) and to the point, with an identifiable message that focuses on why the story we are telling is important, and how it aligns with ED's mission. OCO is interested in highlighting the following major themes/topics:

- Show how ED funding is working on a local level.
- Show a commitment/alignment to ED/administration policy or tenet.
- Highlight best practice(s).
- Illustrate successful innovation.
- Demonstrate ED's commitment to outreach, engagement and listening to stakeholders

For additional tips and best practices regarding how to write for Homeroom, please see the [Guide to Writing for Homeroom](#).

OCO has streamlined the process to accept and post entries to maintain quality and prevent duplication. Here are a few guidelines for submitting blogs:

1. Before you write your blog, please send an intent-to-write email to Dorothy Amatucci (dorothy.amatucci@ed.gov) and Patrick Kerr (patrick.kerr@ed.gov) roughly one week in advance of when you'd like the blog posted. Include in your email a proposed title and a proposed date. OCO will make the final determination of whether a blog is posted.
2. Please submit your edited blog post to Dorothy Amatucci (dorothy.amatucci@ed.gov) and Patrick Kerr (patrick.kerr@ed.gov) at least 48 hours before your proposed posting time.
3. Blog posts may be edited for grammar and message to meet the style of ED's blog.

OCO suggests formatting blogs in the following manner:

[Lede] Grab the reader's attention with a personal story, a human interest angle or a compelling stat.

[Here's what ED is doing about it] If you're introducing a problem or an issue, follow up in the second paragraph about what ED is doing/proposing to do about it.

[Context Paragraph] Give the reader the landscape of the problem/issue/event.

[Event details] This is where you put in a few details but consider not doing too deep on this. If it's important for someone who didn't attend the event to know, then include. If not, cut it.

[Wrap up] Conclusion statement + Here's where you can learn more about the subject matter + If you have social media handles, include it with a "lets continue the conversation line."

PART IV — Obtaining an Official Account

Obtaining an Official Twitter Account

1) *Create a Business Justification Email*

Questions you will want to consider include:

- Why would you like to start a Twitter page?
- What is your goal?? How will it help meet ED's mission?
- Could your material be posted on an existing ED Twitter account?
- Who is your audience? Who are you trying to reach?

2) *Create a Plan of Operations*

Questions you will want to consider include:

- What will your username be?
- What will be the background of your page and does it complement the background/branding of other ED accounts?
- What content will you tweet about? (Please include 10–12 sample tweets with relevant links and hashtags)
- How often will you tweet? It is recommended to post at least once a day. Effective accounts tweet throughout the day, and engage with users.
- Who will be responsible for posting tweets?
- You will be responsible for record management of your Twitter activity in accordance with criteria set by the Office of Management.
- What will be the criteria for retweeting and responding to inquiries from other Twitter users?

3) *Designate a Twitter Account Administrator & Backup Admin*

- Please state your long-term strategy for account maintenance. For example, if the person who is running the account leaves ED, what happens?

4) *Send Your Business Justification and Plan of Operations to Dorothy Amatucci for approval*

If Approved:

- Create your account. Add a header photo, background photo and a profile image that complies with ED Branding. (Note: OCO Digital is working on updating the

Department's Official Style Guide. In the interim, please consult with Joe Portnoy regarding social media account profile pictures, cover photos and graphics.)

- Contact Dorothy Amatucci (dorothy.amatucci@ed.gov) in OCO and provide the username and password for the account (OCO will not use your page—it is only for continuity and security and required by ED's social media policy).
- Add your bio to the page and link back to your ED website or ed.gov in the website field of your profile.
- Promote your new account through newsletters, emails, documents and on your official website.

Obtaining an Official Facebook Page

1) Create a Business Justification Email

Questions you will want to consider include:

- Why do you need a Facebook page?
- What do you hope to accomplish? How will it help meet ED's mission?
- Who is your audience? Who are you trying to reach?
- Could your material be posted on an existing ED Facebook page?

2) Create a Facebook Plan of Operations

Questions you will want to consider include:

- What will the name of your page be? Once you create a name, it cannot be changed, so please be thoughtful and deliberate.
- What is the proposed short url for your page? (eg., www.facebook.com/ed.gov)
NOTE: Once you create a name, it cannot be changed, so please choose carefully. Only once the page receives 25 fans will the short URL be created and approved.
- What type of content do you plan on sharing?
- Who will edit and post content?
- How often will you post?
- Who will monitor comments? You must monitor comments at least daily to ensure that comments that are posted comply with the [ED comment policy](#). You should remove any comment that does not comply. Do you plan on engaging with fans who comment? If so, how will you engage?
- Who will monitor the direct messages sent to the page? How will you respond?
- How will you measure the success of your page? What metrics will you use?

3) Designate a Facebook Account Administrator and Backup Admin

- Please state your long-term strategy for account maintenance. For example, if the person who is running the account leaves ED, what happens?
- How will you maintain records for your file plan?

4) *Submit Your Business Justification and Plan of Operations to Dorothy Amatucci for OCO Approval*

If Approved

- Create your page. Add a compelling cover photo and a profile image that will help fans identify the ED brand and your page. (Note: OCO Digital is working on updating the Department’s Official Style Guide. In the interim, please consult with Joe Portnoy regarding social media account profile pictures, cover photos and graphics.)
- Add relevant facts/pictures to your timeline (you can backdate them).
- Contact OCO’s Director of Digital Strategy to make OCO’s Facebook profile an admin for your page (OCO will not use your page—it is only for continuity and security). Keep in mind, you cannot create an alternate account to manage Facebook pages as it violates Facebook’s Terms of Service. Admins will need a personal Facebook account.
- In the “About” section of your Facebook page, you will need to add:
 - This language: For the official source of information about the U.S. Department of Education, please visit www.ed.gov.
 - A link to ED’s Social Media Comment Policy
 - Add any additional information that your fans will find useful.
- When you reach 25 fans or likes, secure the OCO approved short URL for your page. Remember, once the short URL is created, you cannot change it.

For questions regarding other platforms, please contact and coordinate with Dorothy Amatucci (dorothy.amatucci@ed.gov) in OCO.

PART V — Best Practices for Posting

Best Practices for Posting

On Twitter, users have to say a lot with very few characters. Fortunately, Twitter has compiled everything you need to know about posting on an official account at business.twitter.com.

All ED employees are encouraged to explore the full site, but especially:

- [Twitter 101](#)
- [Establish your brand personality](#)
- [Write good tweets](#)

Additionally, Facebook’s [Posting Best Practices page](#) has a lot of great content with which all ED social media practitioners should familiarize themselves.

Also, check out GSA's [Social Media page](#) for more info about social media for government and [writing posts](#).

Do:

- Make your posts pithy, clear, and catchy. Have some fun and be personable with phrasing, but always make sure posts are in good taste. When in doubt, ask a colleague!
- Content is king: provide information, insight, and clarification.
- Respond to questions, but stick to your area of expertise. If a user asks a question you can't answer, contact Dorothy Amatucci in OCO or work offline within your principal office to identify someone who could give you information that you would be able to then share via your official ED account.
- Respond to complaints, if you can, but don't get into arguments.
- Phrase questions so they're open-ended—this helps to engage users.
- Link to more in-depth content that is relevant, such as a page on our website, a video on our YouTube channel, or a post on the Homeroom blog
- Check your spelling and grammar! Your users will be the first to point out when you make these types of mistakes.
- Consider scheduling some tweets ahead of time. [Hootsuite](#) and [Tweetdeck](#) have federal-compatible negotiated Terms of Service agreements and are approved for use by the GSA. ED employees interested in using these tools should contact Dorothy Amatucci (dorothy.amatucci@ed.gov) for a brief tutorial.

Don't:

- Don't post about a topic you wouldn't discuss in another forum or situation. If you don't want to see it on the front page of a newspaper, don't post it on social media.
- Don't post political viewpoints, anything that might be construed as lobbying, or endorse commercial products or services.
- Don't post anything that does not exist in public elsewhere (e.g.: data emailed to you by a colleague should not be posted; an official ED news release containing statistics that are already public on our website is okay to post).
- Don't get into arguments or engage in personal attacks.
- Don't let your account languish.

PART VI — Contact Information

Contact Information

Adria Marquez, Director of Digital Content
Adria.Marquez@ed.gov

Andy Le, Senior Director of Digital Strategy
Andy.Le@ed.gov

Dorothy Amatucci, Digital Engagement Strategist, OCO
dorothy.amatucci@ed.gov
tel: 202-453-6549

Joe Portnoy, Special Assistant for Visual and Digital Media, OCO
joe.portnoy@ed.gov

Paul Wood, Studio Team Lead, OCO
paul.wood@ed.gov
tel: 202-401-3876

OCO Web Team
web@ed.gov

Part VII — Standard Disclaimer

Standard Disclaimer: <http://www.ed.gov/> is the official source of information from the U.S. Department of Education (ED). ED cannot attest to the accuracy of other information provided by linked sites. Using third-party sites does not constitute an endorsement by ED or any of its employees of the sponsors of the sites or the information or products presented on the sites. Also, please be aware that the privacy protection provided at ED.gov ([ED privacy notice](#)) may not be available on these third-party sites.