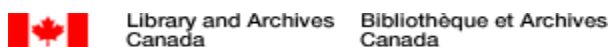




Social Media and Public Sector Policy Dilemmas

Toby Fyfe and Paul Crookall

The authors wish to thank Library and Archives Canada and the Office of the Privacy Commissioner of Canada for their support of this project.



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Printed in Canada

ISBN 1-55061-100-3

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Executive Summary

The most significant impediment to government use of social media is the “clay layer” in management and the hierarchical public service culture. Government has not adapted to the promise of new media to liberate information, foster collaboration and openness and promote organizational change. Impediments do not rest with privacy, security, information management and official language policies and legislative frameworks.

Social media demand a new paradigm regarding the ownership, use and management of information. The challenges of privacy and official languages can be managed within that new paradigm. The problems linked to information management, privacy and security are simply new manifestations of old phenomena; there have always been risks of improper disclosure and misuse of government information.

The public sector needs organizational change, developing a culture of trust and openness that will allow public servants to take advantage of the benefits that social media offer.

Public sector employees fall into three camps on the social media issue and represent all age groups: there are the zealots, who love social media for the experience and opportunity they offer; the collaborators, who see the tools as helping them do their jobs better; and the resisters, who are concerned about the risks associated with government use.

There is a dearth of analytic support, cost/benefit analysis, or measures of success regarding the implementation and use of social media in government.

Governments must show leadership in the development of adaptable and responsive guidelines regarding the use of social media by public servants.

There is a strong appetite for a community of practice to discuss common issues and to develop shared solutions to meet the opportunities that social media are offering governments within the limits required of public sector organizations.

About the Authors

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Introduction

In the News

Nicole Vienneau disappeared in Syria three years ago and Foreign Affairs won't tell her family what they know, claiming they need Nicole's signature to release any information under the Privacy Act.

An Israeli soldier uses Facebook to tell his friends about a raid his army unit is going to make that night. Other soldiers notice and report him. The raid is cancelled and he is court-martialed.

An 18-year old university student jumps off a bridge to her death. School authorities had not told her parents of her suicidal ideation because of privacy concerns.

A government IT analyst spends hundreds of hours of her own time helping to build a social media site for new professionals in governments across Canada. On the day of the launch, she has to bring her personal laptop to the office and work off the corner of her desk because regulations prohibit her accessing the website.

Social media are in the news: for the public sector, is it too much, too little, or just right? The powerful tools unleashed by social media have increased the ability of people and organizations to share and access information easily and instantaneously. These tools are forcing governments to critically examine issues such as the management of information and the limits of privacy and security in the public sector.

The Study

This research paper examines the thoughts and attitudes of public servants from three levels of government, academics, consultants, and members of think tanks on the legislative, policy and operational implications that arise when new social media tools are used in public sector organizations.

Questions were asked regarding the efficacy of existing policy and legislative frameworks in areas such as information management, privacy, security and official languages. What is adequate when it comes to government use of social media tools such as wikis, blogs, social networking sites, and Twitter? Are policy objectives that were formulated forty years ago still relevant? How can organizations and public servants mitigate risk?

Questions were also asked about the role of social media in addressing the challenges of government modernization and the transformation of hierarchical organizational cultures to ones that are collaborative and open.

In the digital age information is used by citizens and companies as a resource that can provide economic and social value, increasing a country's innovative capacity and competitiveness. The discussions centred on the implications of new social media for the management of information by governments.

This report is part of a larger project designed to support a community of practice in this important area that will be sharing information, devising shared solutions and continuing a collaborative exploration of public sector policy, legislative, and governance issues in the areas of privacy, information management, official languages and security. Phase 1 included five roundtable discussions held in Albany, NY, Toronto, Ottawa, Edmonton and Victoria. It also included the exploration, through three case studies, of how similar issues are being tackled in the United States, the United Kingdom, and Australia. This outcome report summarizes the findings, provides an "as-is report" of the roundtable discussions, and concludes with the case studies.

The next phase, proposed for fiscal 2010-2011, will include pursuing the recommendations of this report, the development of a community of practice for ongoing collaboration - perhaps through an IPAC interactive website - an international conference to gather and exchange experiences, and further case studies of successful examples drawn from organizations and governments.

The project is sponsored by the **Institute of Public Administration of Canada (IPAC)**. We appreciate the financial support of **Library and Archives Canada** and the **Office of the Privacy Commissioner of Canada**, the logistical support from IPAC National and the Toronto, NCR, Edmonton and Victoria IPAC Regional Groups, and the valued contributions from the participants in the research.

What Was Learned

In our five facilitated regional roundtable conversations and several individual interviews we consulted over 100 committed policy and practitioner individuals from the public, academic and private sectors.

Contrary to expectations, we did not find a generational divide on these issues. In our consultations we heard from all ages and all ranks both inside and outside the public service. In a room with a former deputy minister, a retired publisher from McLelland and Stewart, a private sector think tank researcher, and a new professional with three months on the job the conversation flowed smoothly and the approach was as equals. There were participants from their 20s through to their 60s.

The answers to our questions were thoughtful and those consulted expressed similar issues and concerns with a remarkable coherence. The key areas of agreement were that:

- Stemming the tide of social media in government would be akin to King Canute trying to stem the ocean tides from the shores of England. The pressures for social media use are powerful and the uses multiple.
- The current privacy and security issues are new manifestations of old phenomena. There have always been risks of improper disclosure and misuse of government information.

- Participants fall into three camps on the social media issue: the zealots, who love social media tools for the experience and opportunity they offer; the collaborators, who see the tools as helping them do their jobs better; and the resisters. The resisters include those concerned with risks of policy violations and, more compellingly, with having to face an uncertain and changing organizational culture. We were told that there are a few who use privacy concerns as a screen to block access to information that would suggest they could be doing a better job.
- There is a dearth of analytic support, cost/benefit analysis, or measures of success regarding the implementation by, and use of, social media in government.
- Organizational and cultural change is required in order to modernize government so it can benefit from new media. A culture of collaboration and trust is needed.
- Government policies are not the villains; instead, the problem was conceptualized as one of organizational culture and the “clay layer.”

The Drivers

In the News

In Ottawa in March 2010 there was considerable publicity over the federal government’s Speech from the Throne, the federal budget, debate on the claw-back of pensions, and the fourth report of the Advisory Committee on the Public Service.

On March 8, an editorial in the Globe and Mail reported: “Quietly, without fanfare, a small but powerful seismic shift took place in the public service. It went virtually unnoticed, but the long-term ramifications could be more significant than the other events. The Clerk of the Privy Council logged on to GCPedia, created a page, and asked public servants to talk to him directly about renewing the bureaucracy.”

The message was that the Clerk of the Privy Council, Wayne Wouters, is listening and using social media to do it. The now popular and widely-cited collaborative Government of Canada wiki, GCPedia, was started in the fall of 2008. Then CIO Ken Cochrane announced it at the Government Technology Conference (GTEC); when his Minister heard of it, he questioned its appropriateness.

Our participants were unanimous that the issue is not whether governments should embrace social media, but how. Six drivers for the increased use of social media came out of the discussions. The prevalence of each differs based on the organization’s responsibilities and the attitudes of its leaders.

1. Internal collaboration

At the federal level, NRCan's internal wiki broke ground in mid-2008, and its use has proven that employees want to connect across branches and geographic locations. Who has time today to sit down and connect? Collaboration is often on the fly – and wikis are ideal for that purpose.

2. Cross-agency collaboration

Many public sector employees have conceptually left their organizational silos and want to connect, share experiences, and collaborate with other people in other levels of government and agencies within their own government. Intelipedia links information sources from sixteen US agencies on intelligence issues. GCPedia connects federal public servants in Canada. In the United States, MuniGov2.0 is an online community of practice for governments at all levels devoted to exploring uses of web 2.0. Not satisfied with official (non-) response for connecting less formally, an American federal employee created GovLoop, a social networking site specifically for government professionals to connect, LinkedIn/ Facebook style. It has 25,000 members.

3. Providing information

Many governments see social media as a new channel for delivering information and services. The Public Service Commission has a “second life” site where young people seeking employment can use an avatar to explore the dimensions of a job such as firefighter; rather than just reading about it they experience it indirectly. HRSDC, noting many inaccurate public postings about the Canada Student Loans program, now has staff who go onto third party sites for “corrective blogging.” Information in response to the H1N1 flu was posted online using social media tools. Educational messages about smoking, alcohol, and driver safety are all on the web courtesy of health promotion agencies.

4. Open government

In *Wikinomics*, organizational change and technology guru Don Tapscott describes GoldCorp's use of a wiki to seek input on how it should conduct its gold-mining operations. It put previously proprietary information on the web with a “reward” for those who helped. The City of Edmonton posted information on the web about bus routes and schedules, noting that each bus had a GPS. A citizen put together an app; users can now Google it to find out when the next bus will arrive at their stop. There was no cost to government but it provided a service and added convenience to citizens. This use of technology goes beyond just posting information, recognizing that information is a resource to be made available to citizens and companies to use in ways they see fit, not just in ways government wants.

5. Interacting with and improving services to citizens

The federal government is using the web to consult with citizens to learn if they agree with a plan to introduce random breathalyzer tests to deter drunk driving. Some provinces have designed policy through full blown online consultation such as B.C.'s “Conversation on Health” and Ontario's “Electoral Reform” that involve face- to- face meetings, blogs and online forums. New Zealand used blogs and wikis to help write their new Police Act.

6. Transforming government culture.

This is perhaps the most fundamental implication of the use of social media by government. Social media are spontaneous and instantaneous. Government is slow and steady.

General Rick Hillier, when he was Chief of Defence Staff, told the story of how in the War of 1812 generals would assess the military situation, write a report recommending action, send a courier by fast horse to the coast, then onto a fast ship, then rush it to London, taking about two months. Then the establishment there would deliberate, give their decision to a courier, who would take a train to the coast, a fast ship to North America, a fast horse to the battle, and deliver the reply two months later.

Now, Hillier observed, field staff can report in real time, instantaneously. And then wait two months for headquarters to get back to them.

The pressures to use social media are as irresistible as the tides. Government is recruiting thousands of young new professionals for whom social media are the way they live, work and think. Even without a business case, there would be a strong cultural one.

The message from the consultations was clear: governments must adjust. Some resistance is understandable. Instantaneous, informal communication can be a problem for governments that are used to formalized communication, layers of approval and multiple edits and re-edits of memos, letters and slide presentations. If governments are to become more nimble, accountable and open, social media tools in the hands of employees can drive and facilitate the process.

Old Issues, New Scenarios

Our participants pointed out that the information, privacy and security management issues around social media are not fundamentally new, but they need to be interpreted in a new context.

Recall the soldier's inappropriate use of Facebook. It was apparently about the one hundredth time the Israeli Defense Force had dealt with improper postings and use of third party social media. The desire to share information is not new behaviour. In the Second World War the motto was "Loose lips sink ships". Soldiers, sailors, and airmen were constantly reminded not to share, even with family, information about their operations. And there were, inevitably, letters and conversations that violated that dictum.

Disgruntled public servants can forward emails that incriminate others. Before email, plain brown envelopes were dropped off to the media or we witnessed the spectacle of an Igor Guzenko stuffing his clothes full of secret documents. The speed of dissemination is much faster now.

Lawyers were initially barred from using fax machines because of the potential misuse, lack of security, and potential for forgery. Now, fax copies are accepted as legal documents. The BlackBerry and email were slow to enter government and now are ubiquitous.

In short, it's new tools but the same issue: how to manage the challenges that social media raise regarding information management, privacy and security.

Analytics: How Will We Know When We've Got It Right?

We asked in our consultations, and our research partners in the USA asked in their surveys: How will we know when social media are making a contribution that is more valuable than their cost? The view was that there are as yet few direct measures of success in using social media. There is personal opinion and there are the more indirect citizen satisfaction, citizen engagement and employee engagement scores.

There was agreement that more work needs to be done to make the business case for government use of social media including analyzing the costs and benefits (and the benefits that would be foregone if they are not used) built upon agreed-upon criteria for success.

Managing Risk

The lengthiest and most animated conversations were on managing the risks of social media use and changing the organizational culture to better support collaboration and social media use.

Several approaches were suggested.

- *User preparation.* Participants argued that the challenge is to instill employee discipline based on an understanding of risk. For example, B.C. has a course for political aides and policy makers on "evidence-informed policy." Other jurisdictions have training on the use of social media. Thoughtful choices about what to put on social media sites should replace spontaneous babbling.
- *Executive support.* Leadership brings others to the table, promotes change (and got the public service into the Globe and Mail in a positive way).
- *Enthusiastic champion.* Most governments have now learned this lesson. It's not just support that's important, it is the willingness of a champion to experiment and learn how the tools can be applied to business problems. The champion should be tasked with reporting back on progress.

- *Cross functional teams*, bringing different perspectives and skills to the table.
- *Review*. Reviews analyzing proposed government social media implementation and use from security, cost benefit, information management, privacy, and official language perspectives.
- *Goals*. Social media goals, so employees can make smart choices about what and when to use social media for collaboration and information sharing.
- *Structure*. Governments should assign specific responsibilities, such as environmental scanning, to specific people.
- *Policy frameworks*. Governments should create frameworks that are refreshed by new guidelines that adapt to changing situations; changing legislation is cumbersome and slow.
- *Tools to measure success*. Tools to assess government investments in social media and returns on investment are required.

The practitioner community is not as discontent with privacy and official languages concerns as suspected and has developed “work around” solutions. For example, users of GCPedia can use an English or French interface and can post in either official language. The Treasury Board of Canada Secretariat and the Office of the Commissioner of Official Languages have been working together to resolve issues around the translation of final documents.

Participants believed that in general the “clay layer” is the problem and reiterated that an organizational culture of trust embedded in the competent and responsible use of social media are keys to improved and safe use of social media in government.

Participants indicated that there is a vast appetite for collaboration and for a common site to connect with other public servants.

Dancoff’s Law: “Optimum development occurs when an organism makes the greatest number of mistakes consistent with survival.”

Yogi Berra: “We made too many of the wrong mistakes.”

Corollary: “The Public Service is most effective when the right mistakes are supported and the wrong mistakes avoided in a climate of trust and innovation.”

Legislative Renewal

Justice William O. Douglas wrote of his 36 years on the U.S. Supreme Court that “(s)ecurity can only be achieved through constant change, through discarding old ideas that have outlived their usefulness and adapting others to current facts. ... Free speech is not to be regulated like diseased cattle – the audience that hissed yesterday may cheer the same performance today.”

Social media and change are happening so rapidly that participants recommended the challenges that arise be managed through guidelines rather than legislative change. But those in information, privacy and language organizations often said that legislative change is needed.

Two Sets of Rules

In response to the wide range of expectations that citizens have regarding service delivery, governments have created multiple channels so that citizens can interact face-to-face, by mail, phone, or online. Participants suggested that perhaps it is time to consider diversity in privacy legislation where some information will be protected while other information will not. Participants argued that just as citizens should know the difference between posting a love letter on Facebook and sensitive medical information, so public sector employees need to understand that there are both corporate and personal views and that there is political risk in confusing the two.

Leadership

Countries around the world are taking initiatives to manage and benefit from social media. The Australians are considering creating a lead agency to replace the current fragmented approach in order to champion and manage intelligent social media use in the public sector. The Americans have tasked specific roles and identified a leadership model that sees agency CEOs driving the social media agenda. The UK has created a new Cabinet post, Minister for Digital Engagement. The Clerk of the Privy Council gets credit for leading by example in Canada.

Making Information Accessible

The development of a culture of public information sharing appears to be a significant outcome of web 2.0 in the United States, Australia and Britain. This is not the case in Canada, especially at the federal level.

On his first full day in office, Barack Obama issued a presidential memorandum ordering the heads of federal agencies to make available as much information as possible, The Economist reported. The order read “with a clear presumption: in the face of doubt, openness prevails.”

“Providing access to data creates a culture of accountability,” The Economist quotes US federal government CIO Vivek Kundra as saying. His objective is to put as much government data and information as possible online, including health care data, once privacy issues are resolved. “There is a cultural change in what people expect from government, fuelled by the experience of the internet and real time access.”

One may contrast Obama’s order with the recent opinion of former federal Solicitor General Doug Lewis as reported in the Hill Times who stated: “Any government could spend all their time providing information. But the vast majority of the public only has an interest when they decide to have an interest, and this demand for great chunks of information doesn’t make things go round in their daily lives, so I’m skeptical as to how much they want to know.”

Participants argued that the use of social media is leading to a fundamental shift in how public sector information is perceived. They argued it should be considered not as a possession owned by the government but as a resource that gains value when shared.

Policy Response

One of the central questions of this research was: should information, privacy, security, and official languages legislation be changed to adapt to social media? Participants did not see current legislation as the major impediment, nor did they see privacy and official languages legislation as “the villain.” Nonetheless, participants did share specific policy responses.

The Alberta government has drafted guidelines for the use of social media by employees that have been sent to the deputy minister community for feedback. The federal Treasury Board Secretariat issued guidelines last year and is in the process of drafting more. The Office of the Privacy Commissioner of Canada has recommended changes to its legislation.

In the United States, the Department of Defense issued guidance in early March to its military personnel. The Israelis are also updating their policies and related training. In Australia, a major review has just culminated in a report that is being reviewed by Cabinet.

Specific issues were brought up by participants and are acknowledged below.

Records Retention and Information Management

Participants discussed how much online content should be retained. It was noted that there was a time when telephone conversations, office meetings or informal chats were not recorded. But since even informal online chats involve keystrokes, they are now recordable. In the context of information management, they debated to what degree social media content should be classified as a record and what should be the best strategy to determine what should be on record.

The Changing Meaning of Privacy

“Privacy is dead,” Facebook founder Mark Zuckerberg proclaimed in January, 2010. “Privacy is no longer a social norm” he added. “People no longer have an expectation of privacy in social media.”

Participants discussed the limits of privacy in an environment in which Millennials act as if privacy is dead, noting that public sector organizations need to continue their assessment of its evolving meaning for members of the public and employees who are using social media.

The Privacy Commissioner in Switzerland ruled about Google Street View that “identities are not made sufficiently unrecognizable, especially in sensitive locations outside prisons.” Germany, Greece, Japan, the U.K., Canada agreed and Google was forced to make changes.

Facebook added “significant new privacy safeguards” as a result of the demands of the federal Privacy Commissioner.

Security

Security breaches are real, from organized attacks by foreign governments to teenage hackers seeking to amuse themselves in their suburban basement recreation rooms. Breaches have happened, and will happen.

“Security is mostly a superstition. It does not exist in nature, nor do the children of men as a whole experience it. Avoiding danger is no safer in the long run than outright exposure. Life is either a daring adventure, or nothing. A happy life consists not in the absence, but in the mastery of hardships.”

Helen Keller

The consensus among participants was that security remains an important concern but that prohibiting the use of social media by public servants will not solve the issue. There was a view that the benefits of social media, and its momentum, are too great.

A Culture of Trust

Participants agreed that a culture of trust needs to be developed in the public service if the full benefits of social media tools are to be realized by governments. Their view is supported by Australia, which, in a report on the implementation of Government 2.0, argued that such a culture change will “enable employees to pursue the open discussions that the technology implies within the confines of typical organizational structures...the operative concept is engagement, liberating public servants, promoting collaboration between the public sector and citizens, and sharing information.”

“I repeat...that all power is a trust – that we are accountable for its exercise – that, from the people, and for the people, all springs, and all must exist.”

Benjamin Disraeli

Information is power. Substitute “information” in the quote: that all information is a trust - that we are accountable for its use and its dissemination.

The governments of Australia, Britain and the United States, believe their citizens are entitled to information. They see the release of information both as a tool of accountability and as a resource to support innovation and create value. They recognize the risks and are attempting to manage them through guidelines, training, and culture-building, while trusting that public servants have a “feel” for how to react in real time.

Participants noted that we frequently hear politicians say that they want public servants who are fearless in giving advice and who are loyal in implementing policy. They wondered at what point some of that fearlessness would be allowed to appear on social media sites.

Conclusion

Overall, there was a consensus that governments need to implement and use social media. The challenge is with the “clay layer” in management and the hierarchical public service culture which has not adapted to the opportunities presented by new media for increased consultation, collaboration and information sharing.

Expectations and technology have changed since privacy, information official languages and security laws were drafted years ago, leading to a new paradigm regarding the ownership, use and management of public sector information. While challenges regarding privacy, security and official languages can be managed, information legislation may require revision.

In the short term, leadership is required in the development of adaptable and responsive guidelines regarding the use of social media by public servants along with building a culture of openness and trust.

There is a strong desire to continue working together to seek shared solutions to the ongoing challenges for governments raised by the social media revolution.

What is needed

1. **Governments** should continue and expand collaboration through shared research and shared experiences.
2. **Governments** should identify leaders and task them with ensuring that the benefits of social media are taken advantage of.
3. **Leaders** should build a climate and behaviour patterns within their organizations that support: collaboration, building trust, respecting privacy/security/language/IM needs, and making “the right mistakes” while improving service delivery and efficiency.
4. **Policy centres** in the area of privacy, official languages, security, and information management should understand the new paradigm and promote updated guidelines and, in the longer term, legislation as required.

Recommendations for Next Steps

1. Governments and stakeholders work together to ensure that there is clearly identified, sustained and accountable leadership aimed at ensuring that the benefits of social media are taken advantage of by all levels of government in Canada.
2. Governments and stakeholders develop solutions regarding the use of public sector information in response to the new paradigm, and seek concrete ways to ensure that its value as an economic and social resource is optimized through an open government approach.
3. Governments and stakeholders work together to develop shared and consistent guidelines for the use of social media by public servants.
4. Governments and stakeholders develop a strong business case for the use of social media in the public sector, including cost/benefit analyses and measures of success regarding their implementation and use. Tools should include reporting.
5. Specific solutions around the managing of privacy, security and official languages be collectively pursued.

Appendix A: As-is Notes from Roundtable Sessions

Toronto, Ontario, February 23, 2010

The discussions centred on cultural change. The participants were an eclectic blend of federal, provincial, and municipal public servants, academics, senior executives from the private sector, consultants and new professionals.

The increased use of social media is inevitable, so it is best to plan how to take advantage of it and get ahead of the wave. Government used to trail innovation, especially management innovation. But the “long tail” isn’t long anymore and new tools overtake old tools. One needs to scan the environment for what is coming.

Ontario’s Privacy Commissioner, Ann Cavoukian, told the press that “a paradigm shift is required, regulation alone won’t ensure privacy.” Our group agreed and saw the changes and shifts needed as coming too quickly to respond to with legislation. It favoured the use of guidelines. There is a need to move from an “approvals culture” to the “conversant platform.”

In a room of experts, it was noted that no one is *the* expert any more. Knowing what questions to ask (and repeat) and being responsible is more relevant than being an expert on yesterday’s technology. Ask: What do I need to think about, because what you know keeps changing. There are no perfect answers. There are no enduring answers.

When regulations impede appropriate action, workarounds are needed. There was some concern about finding a better word as “workaround” sounds too much like tax evasion or violating the law. They considered ways of coping within the law, for example, by using a computer translator rather than a live one for online discussions.

Risk reduction received a lot of attention. There is much collaboration going on. Risk is being reduced through pilots, through sharing results with other organizations, through employee education, through creating small projects rather than large ones and through CEO leadership.

We spent some time discussing Dancoff’s Law: “Optimum development occurs when an organism makes the greatest number of mistakes consistent with survival.” His point is that errors – consistent with survival - can be good. In the public service, that generally is undervalued.

The collective experience in the room was that in the case of errors or things that go wrong, where the intent had been consistent with the mission, the plan reasonably thought out, the problem identified promptly and corrected – that in those cases, the media and citizens tended to be forgiving. However, errors of personal greed, such as a \$750 lunch for two in Paris at taxpayer expense, cheating on travel claims, or inappropriate and unjustifiable use of force – those are dealt with harshly in the media especially when there were initial attempts to cover up and/or deny the incident.

Yogi Berra was a catcher for the New York Yankees baseball team. Explaining how they lost the World Series one year, he said: “We made too many of the wrong mistakes.” Trying to stretch a double into a triple in a tight game to get the insurance run and not making it might be a forgivable mistake. Missing the throw to home plate when the winning run is on third is, unfortunately, the wrong mistake.

Public service does not seem to distinguish between the right mistakes and the wrong mistakes. As a result, public servants are fearful, which thus reduces innovation and avoids potentially beneficial actions and decisions. The antidote to fear, Wayne Wouters told Canadian Government Executive magazine in a recent interview, is trust. “Trust is the antidote to risk aversion and fear of mistakes and clearly, trust needs to be there in the relationship between Ministers and their departments. Public servants need to trust that they can speak truth to power.”

When public servants know that their manager trusts them and will not “hang them out to dry” they become more innovative and productive.

Blending Dancoff’s and Berra’s observations with our own, we developed a corollary: “The public service is most effective when the right mistakes are supported and the wrong mistakes avoided, in a climate of trust and innovation.”

National Capital Region, February 25, 2010

The discussion focused on cultural change of the bureaucracy as the problem, rather than privacy or official languages. Trust needs to be built, along with acceptance of growth-building mistakes. It was a similar conversation to the one in Toronto. Trust and respect are essential. But by nature, government is driven by fear and rules, not trust and innovation. We need to move from rules to guidelines and accept mistakes as a cost which is more than offset by its benefits.

Consider creating two classes of documents/information/actions: formal legal ones subject to the full privacy rules and “working” documents with looser guidelines.

At NRCan, the DM was clear about trust and the fundamentals of collaboration, free and open information, a code of conduct and guidelines.

Social media allow good people, previously hidden in the ranks, to surface their ideas and talents more quickly and float to the top. Weaker managers fear this.

Consulting the public on policy has the downside that if you don’t listen to them or take their suggestions, they may be outraged.

Social media means that now everyone has responsibility under the legislation. Since anyone can “publish,” each must be trained in assessing privacy, security, and official languages impacts. Each must be accountable. There is a struggle between the “push and publish” value and the “resistant, firewalled, let them pull it out of us” mentality.

The Official Languages Act, now 40 years old, needs to be updated.

HRSDC has begun “corrective blogging” having found errors on third party sites about the Canada Student Loans program.

(Federal public service blogging guidelines on GCPedia were announced after this meeting:

Some Guidelines were issued in Nov 2008, others are in the draft stage, a dozen policy and legislative centres are coordinating on this. “Collaborative techniques pose a new challenge to norms” the guidelines read. They recommend SM users consult privacy, ATIP, Official Languages, and FIP, use a common platform, be functionally accessible, inform users of their responsibilities and appropriate behaviour, avoid anonymous contributions, monitor and correct the site.

Original blog postings and final versions must be official and bilingual, but conversations and responses can be posted in the language of the contributor.

Responsibility is centred in the Communications Branch.)

Public servants want to collaborate. Thus, a comprehensive site to facilitate this is suggested – beyond IPAC Connects, GovLoop, the University of Toronto site, and internal government sites like GCPedia. The tools designed to connect people are not connected to each other.

Change needs to be actively managed and change management models used. The paradigm shift is demographic. Thus tools are needed to amplify listening skills. Trust increases social connections. Silos need to be broken down and government needs to connect with the public.

Dancoff’s Law was discussed, and the conclusion is that we should fail early, fail often, and fail small. Give rewards for good failures. Tell stories, in a positive way, about failures that were learned from which moved the agenda without damaging a career.

Leave your ego at the door; there are no more “experts” who know everything because of their 30 years seniority. The command and control environment does not mesh well with SM and the need to communicate laterally.

We have failed to maximize the benefits of social media and IT due to mismanaging the people side.

The story was recounted of how Paul Wells blogged and a federal Commissioner responded to the site from home, signed it “the Commish,” then left on a business trip. His office was in a flap as everyone wondered if it had been an imposter. It raises the issue that public servants at all levels need to be clear when using social media whether they act as an organizational spokesperson, in their official capacity but on their own initiative, or as a private citizen.

Storage of records is an issue. At one level, there is a desire to store minimal information. Files and records are eroding and being stored on platforms no longer easily accessible. We have tons of data, but we cannot access it. The old days of a hard copy central registry that stored all the documents on a topic

are gone. The massive data from social media will be the tipping point for Library and Archives. This is a serious information management issue.

Is privacy dead? In some circumstances we do not have privacy, such as the small town hairdresser or the local diner/pub. So we need to recognize that some social media sites do not allow privacy and treat them differently from confidential health information.

Is the Official Languages Act still relevant? Service delivery has changed since the Act was passed. Should we now consider how to create a space where people are free to use their language of choice to get information and make connections?

Building ideas was discussed. Few ideas spring perfectly from one mind. They benefit from review, criticism, feedback and suggestions. Social media allow this. It is favored in some scientific circles, but in the public service there is a fear of criticism, lack of trust that one will be respected and a lack of faith that good ideas won't be stolen. Thus some are reluctant to put their ideas out in the open.

The federal public service is the largest organization in the country, yet trust is a huge issue; there is a culture of non-socialization and keeping one's work life separate from one's social life. Because of the size, SM is "messy."

So, how can we use SM to break down silos and build social connections which build trust?

The Policy Research Initiative (PRI) supports citizen-facing technology, discourse, and the co-creation of policy. A fairly new public servant observed, "government is full of dedicated people working diligently on things not related to their jobs."

Privacy, security, and official languages are not the enemy. As Pogo said, "We have seen the enemy, and it is us." SM can build trust.

Much of the cultural change needed is motherhood; we have been hearing about it for 40 years, but have not taken the right steps – e.g. employee engagement, recognition, respect.

A site is needed for collaboration and communities of practice. A single integrated site is crucial as people are becoming diverse in their interests and want to be part of several communities.

Albany, New York, March 1, 2010

The Centre for Technology in Government is a think tank and research centre associated with the State University of New York at Albany. Its mandate is country-wide.

The discussion centered on the use of social media tools in the USA. Their experience and research confirms that technology can contribute to resolving the tangled problems of 21st century government.

Collaboration is central. Despite being a centre for technology, their view is that this is not a technology issue, it is a communications issue. IT is an enabler of communication and collaboration.

The resistance to social media tools being used comes less from privacy and security concerns and more from control and cultural issues.

In their surveys of government, they have observed that generally no overall strategic plan has been created to specify the benefits sought, harvest the benefits, and measure achievement.

Risk aversion varies between agencies and people; it is not a generational issue, but it is a cultural issue. Canadians are seen as more risk averse than Americans. This served Canada well in terms of its financial institutions during the recession, but does not facilitate innovation, commercialization of innovation, and benefitting from social media tools.

The American focus is more on external uses of social media, getting information into the public domain. They see Canada as more internally focused.

Americans seem more willing to make greater trade-offs regarding privacy. For example, Facebook, which is free, has much less privacy than, say, E-Harmony, which is a paid for service. They expect more when they pay for a service – so demands on government are higher since it is paid for by tax dollars.

New York Children and Family Services staff communicate with youth at risk through Facebook, but can only use it at home. The Ontario Family Responsibility Office uses it at work to chase down “deadbeat” parents. It was suggested Facebook be used as an investigative tool, for information sharing with client bases who do not use other media, and for access to government.

US President Obama, who used SM so effectively in his campaign, is promoting transparency, participation, and collaboration.

On March 5, 2010, the U.S. Department of Defense issued a policy on *Responsible and Effective Use of Internet Capabilities*. As a result, some social networking sites were banned for security reasons. The policy deals with records management, privacy, information collection, public affairs, policy and transparency.

The CIO was instructed to keep in mind that the next wave of tools could turn it all on its head and therefore to establish a process to deal with the future, to monitor emerging tools and trends.

There is recognition that the technology is playing havoc in the area of overlapping policy issues and is disruptive to operations.

This is not a new phenomenon; we experienced similar issues with email, and before that, with the telephone. Both were in wide public use before extensive government use occurred. The problem with current SM tools is that technology is changing so quickly that government can’t wait to get on “the long tail.”

Governments traditionally lag behind in technology then go all-in. In the current context, IT is moving so fast that government needs to change to a pilot early approach, to considering the cost of not being in versus the risk of being in too early.

Privacy. The report *Roadmap 2020*, and the opinion in many circles, is that privacy will be irrelevant by 2020. Some areas are moving faster. For example, Singapore has created a “smart card” that would be inappropriate in other countries, including Canada, where privacy is more valued and more protected in legislation. But what will Canada do in 2020 and beyond, when in an interconnected world others place less value on privacy?

It's like Alice in *Through the Looking Glass*: you have to run twice as fast just to stay in the same place.

Edmonton, Alberta, March 12, 2010

There is more pull from those who want to use social media than there is push from policy. We need to accept that this is an emerging, rather than clear-cut and established issue: it is messy, problems will happen, but the benefits and problems are better than not using the tools.

A key focus should be engaging the community and creating value. An example is the Wikinomics model of co-producers, which allowed Edmonton transit information to be posted and led to a citizen building a live application to tell users when the next bus would be arriving. One suggestion is that transit riders have smart cards which could lead to information being gathered on riders. This could then be distributed to restaurants along the route so they could cater to the riders. Social media can support public policy by encouraging ridership and providing a forum for input so problems can be corrected.

A second key focus is as a tool for policy development and public engagement. Policy development has always been an organic process with public consultation and SM tools make it better.

The third use is as an internal tool for collaboration.

There is a duality around privacy: some support retaining the current rules while others see decreased privacy becoming the norm.

The province has draft guidelines for consultation, but we are unable to release those yet. Another jurisdiction has no policy on the matter, and no resources dedicated to social media.

There are some who fear that if one posts an opinion that is not supported, it will reflect negatively on them.

The provincial *Freedom of Information and Privacy Act* was much discussed as it drives a lot of behaviour. They have a problem with data hosted on US-based servers and agreements on them being subject to Canadian law. There is a fear of internal opinions being released under FOIP requests.

There was recognition that there is a lot of data, but it is difficult to pull it together across agencies to make better informed decisions. Operating without all the data may lead to misinterpretation. Also, pre-set beliefs will lead some to interpret data to support their pre-existing views.

How much data should we retain? We did not record phone calls, but now we record the emails that replaced them.

Web discussions, while the identity of the person making the comment can be confidential, must be known to the moderator.

The topic is being openly discussed. The weekend before, Edmonton hosted an “open cities forum” and in June, Don Tapscott will be leading a forum.

There was a realization that we should not be overcome by a love of the tools.

One participant noted that the much-cited wiki review of the New Zealand Police Act was, in fact, not a success. There was a recognition that policy making was more difficult now than in the past as we have solved the easy problems and now focus on the remaining, intractable problems. Also, BC’s Spark program was not working as well as advertised.

Everything relates to changing the culture, and culture change. There were no measures of success and there is fear of making a mistake. There was positive agreement on the Globe and Mail article that Wayne Wouters was using GCPedia for feedback.

Funding was the next topic. In India, apparently, the Internet is a public resource. In Alberta, SuperNet is run by the government but individual cell phones and the Internet are not.

There is a hierarchy of needs around social media. At the bottom, driving the whole phenomenon, is the push for people to enjoy their jobs, and to collaborate to improve their job situation. At the top is the drive to preserve safety, security and privacy. This puts limits on the lower level needs, but should not be used to limit them unnecessarily.

Prototypes and pilots are being developed, based on business cases. “Positive deviants” need to band together to create a push. Leaders need to develop their appetite for suggestions.

Governments should use standard platforms and open source, rather than uniquely developing them for each agency, but there should be no central control over internal development on those platforms.

The previous clerk, Ron Hicks, promoted horizontal team decision-making.

The biggest fear is of no control and making mistakes, but the beauty of a social media site is that it is self-correcting so mistakes are identified more quickly through the wisdom of the crowd.

The term “collaborative tools” is preferred to “social media.”

Dancoff’s Law was discussed. It is felt that most executives don’t mean it when they say “take risks.”

Citizen expectations are rising; they expect more openness from government and for government to listen more. The solution is PR 101 – become an ongoing credible presence in the social media: be honest, talk straight, confess to mistakes and fix them. Realize that it is not the media's role to tell good news stories about public service – “if it bleeds it leads” is their motto. So good stories are being told on www.albertabrand.com.

Government does not “own” the solutions, the community does.

Einstein stated that you can't solve a problem at the same level of thinking as created it.

Citizens need to listen to each other; there needs to be a society-wide conversation, rather than individuals just complaining to government.

The four key uses provincially are:

- internal collaboration and communication
- external communication, to deliver messages
- interaction, using third party platforms to manage issues, build consensus, co-create with citizens (including co-creating policy)
- service delivery, using citizens and public servants to deliver

They are careful around privacy and copyright issues.

They will be using *Your Alberta* channels to beta test, develop procedures for each tool, train users, and evaluate progress and results

The City of Edmonton has developed an iPhone app, to be released in April, to allow residents to report problems such as potholes and fallen trees. Apps4Edmonton has been created to encourage the community to create apps – with \$50,000 in prizes.

British Columbia, March 12, 15, 16, 2010

The conversations in B.C. included a meeting with Jessica McDonald in Vancouver, a group discussion at the University of Victoria with faculty and public servants who were taking courses, and a group of public servants. The three meetings are integrated below.

While they did not see a generation gap, or digital divide, they did see three subcultures: (1) the tool addicts, mostly younger individuals, who get excited by the tool and pay little attention to the rest; (2) the collaborators, from all generations, who see SM as a tool to facilitate collaboration which facilitates doing a better job; (3) the resisters, mostly early Boomers, who do not use SM tools and don't want others to use them either.

The challenge is measuring a new tool against all the privacy and security regulations and risk scenarios and then using it appropriately.

Official languages, as now practiced, can divide people into two linguistic groups rather than promote bilingualism. One must click on one icon or the other, be it in English or French. Internet sites have buttons that take you either to the English or French site. In printed documents, one cover is English and what follows is English. Flip the document and French is on the other side. No integration, no interaction. Perhaps we should consider promoting receptive bilingualism and New Brunswick style conversations. Social media may actually contribute to bilingualism by having online discussions in both languages.

Switching to social media is scary, but so is falling in love. Disasters are possible. But missed opportunities are also possible. How do you balance these competing interests?

Let go of the illusion of control. Threats to power, privacy and security are not new. The Israeli soldier Facebooking is no different than the sailor writing to his friends – “loose lips sink ships.”

The emphasis has been on corporate responsibility and regulation to control the use of social media and reduce risk. We also need to add individual responsibility and common sense.

Trust that you hired the right people and nurtured the right values.

Policy tends to be driven as a reaction to a worst case scenario; let's step back and take a different approach while planning ahead.

Private space is decreasing but this isn't new either – small town gossiping has always invaded privacy – the local diner and barber shop were hotbeds of conversations and gossip. It was only with urbanization that privacy became popular.

Learn lessons from how we have handled new technology in the past – for instance, lawyers would not use fax machines but now a faxed document is treated as equal to the original. Phones were restricted because of potential abuse but now every desk has one and BlackBerries intrude on private space.

In many cases, convenience trumps privacy. People will give up privacy if it is convenient to do so and if they receive a benefit.

For the future, to promote safer adoption of social media, we need to:

- Have a venue for ongoing discussion (the irony of focus groups to discuss SM).
- Break up the “clay layer” to allow nutrients to flow down to the working level and ideas to be drawn up to the executive level. The group used the image of farming: there is some land that has an impermeable clay layer just under the top soil that prevents the flow of water down to the roots, the draw of nutrients up to the top, and results in flooding when there is a sudden deluge. They saw middle management as a blockage to good performance, in many cases.
- The professional non-partisan nature of PS is key.
- SM exposes government to constant uncertainty about its roles and responsibilities. We must develop a culture that can respond.

- SM tools are viral, there is no realistic way for government to get control. Be prepared to put up walls.
- SM is moving so fast that rules become outdated.
- How to protect public servants from future misuse of their entries – for example, an opinion posted in 2010 may not be the same as one would have in 2015, yet the 2010 is still out there as a permanent record.
- Pay attention to sampling: 10,000 people making the same point may end up being a lobby group that is spamming you.

Is legislation an appropriate tool to manage such a dynamic field?

We need guidelines and trained responsible users, while fostering a culture of risk acceptance, increased trust, and decreased fear. We need a discussion on just how much privacy we want versus information as a national resource which should be used for public purposes.

The bureaucratic concept that “we’re the only smart people, so we’ll develop the policy” is being replaced by “the wisdom of the crowd” and crowd-sourcing policy development. It seems to have worked with Habitat Jam, the New Zealand Police Act, Ontario’s electoral reform, and BC’s conversation on health.

That raises the question: what should schools of public administration be teaching? Should IT, information management, citizen consultation now be core courses? Should in-house training facilities like the Canada School of Public Service, and schools of EMBA’s that cater to public servants, be teaching material akin to these findings?

These new tools will be part of a cultural and change management approach. Managers need to be aware of how to use them. We cannot imagine a manager saying “I don’t use the phone,” but we accept managers who say “I’m not using social media.”

Roundtable Discussion Group Participants

Toronto

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Dempsey MacDonald, Ontario Public Service (OPS)
Mike Logan, City of Toronto
Grant Coffey, City of Toronto
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Wendy Feldman, IPAC
Miranda Bianco, Treasury Board of Canada Secretariat
Anne Murray, Department of Public Safety
Marie-Eve Pepin, Office of the French Language Services Commissioner
Jeff Kerr, Ministry of Land and Resources
Jennifer Franks, Ministry of Municipal Affairs and Housing
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Douglas Gibson, McLelland and Stewart
Erin O'Connor, Ontario Public Service
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Case Study #1

Across the US: The Social Media Puzzle

Natalie Helbig and Jana Hrdinová, Center for Technology in Government

President Barack Obama's first executive order to federal agencies in January 2009 outlined an Open Government Directive that focused on increasing transparency, collaboration, and participation. The order endorsed actions to improve government information provision, create a culture of open government, and evolve policy in this direction. Social media is considered "one way" to achieve these goals.

However, even with endorsement from the highest level, there is no official national blueprint for government to follow in adopting social media-based open government strategies. The federated nature of US government means that extent, and sophistication of use, varies across levels of government. According to a 2009 survey by the Human Capital Institute and Saba, Inc., 66 percent of federal, state, and local government workplaces use social networking tools¹. Governments in the US are gravitating toward publically available web-based solutions such as microblogs (e.g., Twitter), social network sites (e.g., Facebook), videocasting (e.g., YouTube) and photo-streaming (e.g., Flickr). The most popular are Facebook, Twitter, and LinkedIn.¹

It is clear that social media tools offer many potential benefits, but deriving public value from these technology investments requires a "smart approach." This snapshot of social media use in the US draws on a project at the Center for Technology in Government designed to provide insights for governments wrestling with adoption of social media tools. It briefly describes some of the challenges governments are experiencing with designing policies, figuring out what citizens want from government, evaluating success of the investment, and working through the real and potential implications of social media use. The project involved background research and interviews with leaders and practitioners from federal, state, and local governments regarding their experience with publicly available social media tools.

Experimenting with Use in the Context of Government Work

The use of social media by US governments is a relatively recent phenomenon and many are working hard to understand the best way to incorporate, and take advantage of, the new social media capabilities [e.g., social networking, expanded two-way communication, user-generated content, and new media forms) in the everyday work of government.

Many governments see social media, first and foremost, as a new channel for delivering information and services. The new channel offers more control over the type and timing of messages government puts out, provides a new platform to reach different audiences, and is a way to direct people to an agency's web site.

“Nobody shops on main street any more, they shop in malls. Our web sites are like the stores on main street. Nobody visits our web sites. We need to go to the mall. So Facebook is appealing, it’s like the mall.”

Eddie Borges, Public Information Officer, NYS Office of Children and Family Services

Social media tools are shifting perceptions about how to best convey information. As a result, many agencies are re-packaging their existing content or are creating content in a new way. The New York State Office for Children and Family Services (OCFS) uses a series of videos to explain its comprehensive community care program for foster children on its YouTube channel “Bridges to Health.” The multi-part video series is targeted toward its diverse set of stakeholders across the state. The State of California turned its driver’s manual into a video, downloadable from iTunes and accessible by mobile technology. The goal is to reach young drivers and provide a different way of learning to drive. The US Center for Disease Control (CDC) holds health fairs in Second Life, a Web-based virtual world. Participants of this virtual space can go to the CDC virtual facility and ask questions, discuss relevant topics, and learn about important health issues. The space also features streaming video and numerous links to information on CDC’s main web site.

Interacting with citizens is another area where governments are trying to understand the potential of social media; interaction can mean many different things in government work. Interaction with citizens ranges from simply allowing “comments” or organizing contests for user-generated content, to more sophisticated crowdsourcing approaches. The US Transportation Security Administration (TSA) uses “The TSA Blog” to communicate innovations in security, technology and the checkpoint screening process. By allowing comments, the TSA can respond to misconceptions, customer service issues, and changes in regulations. The State of California Office of the Chief Information Officer is piloting IdeaScale to ask its community, which includes citizens and IT professionals around the state, how to best use IT. The experiment was partially a response to critical comments from their constituents. California turned that criticism into an opportunity to learn from the community by soliciting their ideas and asking them to rank them in order of importance. California will then refine the top ideas submitted, fit them to the state context, and then look to implementation. This use of social media though still has some government agencies uneasy about allowing comments, either because they do not have the processes or staff in place to be able to respond to the anticipated volume of comments, or have not settled on strategies to handle comments that are deemed inappropriate.

Social media is also being used in the US to strengthen government collaboration and information sharing more generally. MuniGov2.0 is an online community of practice of government officials at all levels, focused on exploring the use of social media and web 2.0. The site is a clearinghouse for definitions, best practices, examples, and discussions from around the US. In 2008, a federal employee created GovLoop, a social networking site specifically for government professionals, contractors, and students to connect and share information. Today the site has over 25,000 members.

What Do Citizens Want?

Governments are struggling to know “what do citizens want?” and “what do citizens expect?” At this point, frameworks for judging the success of social media use in government are still being developed. As a result, many practitioners are relying on monitoring web standard metrics, such as ‘number of views’ or ‘number of fans,’ free diagnostic tools such as Google Analytics, or sporadic citizen-feedback received through various channels to make these judgments.

Knowing how citizens like to be communicated with is not straight-forward. Governments walk a fine line in this new environment, between being where citizens are and avoiding the appearance of infringing on their private lives. Likewise, the style of communication associated with social media is informal and instantaneous, which sometimes presents a challenge for governments that are used to very formalized communication involving layers of approvals or paper documents. Governments are learning how to respond to these challenges, and adjust their practices accordingly. For example, when the State of Massachusetts Governor’s Office experimented with Twitter, their initial postings were mainly ‘links’ to their press releases. The feedback they received via Twitter indicated that citizens were not interested in formal interaction, which prompted the state to quickly adjust to a more informal style of ‘Twittering’.

“When we started using Twitter we thought this was going to be a great way to push out information. But very quickly, within a day or two, we started getting comments like, ‘don’t do it this way’, ‘this is boring’, ‘just talk to us’. So, we did. We didn’t know what was going to happen.”

Brad Blake, Director of New Media, State of Massachusetts, Office of the Governor

Managing citizen expectations is also complicated. Government often must balance the expectations of “on demand” government with potential public backlash. To manage users’ expectations, the US Environmental Protection Agency posts a standard disclaimer² that informs citizens that comments posted after regular business hours will be responded to during the next business day. The disclaimer solved several concerns: it made it clear that employees were not expected to log-on during non-work hours to answer comments, it allowed them to slow down the expected immediacy of response, and it eliminated the perception that federal employees would be paid overtime to respond to comments posted on their blog at 3 am in the morning.

Designing Policy

As governments across the US embrace social media, the need for new policy has become clear. Government leaders and practitioners need policies in place so they can move forward with responsible and effective initiatives that leverage social media capabilities. Yet, many are struggling with what such a policy should encompass and what it should convey. According to a county CIO in New York state, “the issues connected with the use of social media tools are not necessarily new, but they do have to be reinterpreted for the social media context.”

Social media use in government is not just a ‘technology issue’, it is also a ‘communication issue’. Therefore, the span of concerns that need to be addressed within a policy framework ranges from ensuring technical security to encouraging proper conduct of citizens and employees. Our review of social media policies across local, state, and federal agencies in the US revealed eight important social media-related concerns: employee access, acceptable use, account management, content, employee conduct, security, legal issues, and citizen conduct. Not all policies cover all eight concerns and not all concerns are covered to the same level of detail.

Getting Started: Just Do It or Pilots

Some governments across the US are just “jumping in,” while many are taking more measured approaches such as pilot testing. Usually, a new effort starts because a leader or a practitioner is enthusiastic about social media and they see it fulfilling a particular business need or function. “Jumping in” initiatives usually start small and are limited in scope so that the agency can evaluate potential issues and adjust their processes as necessary.

Some governments are engaging in more formal learning such as pilot projects. The New York State Education Department initiated a pilot project consisting of eight department-level social media projects with a goal of learning enough to inform future agency-wide decisions on adoption.

Governments are also getting creative with resources. Several interviewees talked about utilizing existing studio cameras, many of which were not being utilized to capacity, to make videos, or are using off the shelf commercial software to edit pictures and movies. But, many also noted this use requires a new set of skills for employees doing the work and many are just teaching themselves.

“It was very clear we were already putting ourselves in much greater risk by having program offices use these tools without a policy or framework in place. So, we wrapped our arms around what was already happening, added several new ones, and created a pilot project to help us develop agency-wide governance, policies, and procedures.

Kathleen Moorhead, Project Manager, State of New York Education Department

Getting Started

Executive Support

Executive support brings others to the table and can be instrumental in overcoming different barriers or set-backs.

Enthusiastic Champion

Enthusiasts bring a willingness to experiment and learn how the technology could be applied to actual business problems.

Cross Functional Teams

Cross-functional teams are instrumental in exploring the policy, legal, security, or human resource implications from a variety of viewpoints.

Social Media Goals

Goals provide guidance to employees as they seek to make smart choices among the many social media options.

Policy Framework

Policies create clarity about employee use, as well as provide direction on how to address potential legal and regulatory issues.

Legal, Security, and Performance Issues

Publically available web solutions are popular, but they also bring new issues to the table. Common concerns and challenges are yet to be resolved, including Terms of Agreement agreements, performance and reliability, privacy, records retention, and security threats. Governments are tackling these issues as they emerge, but whether the issues reside at the enterprise level or agency level, governments are looking to each other for guidance and best practices. In April 2008, the US General Services Administration (GSA) successfully re-negotiated the Terms of Service agreements for federal agencies for sites such as Facebook, Flickr, and YouTube. The new agreements addressed some issues with the standard terms of agreement such as liability limitations, privacy, and freedom of information laws³. Similar efforts on behalf of the states are currently underway under the leadership of the National Association of State Chief Information Officers (NASCIO).

Concerns regarding liability limitations speak directly to government's ability to hold third-party vendors accountable. Publically available tools are not accountable to the needs of government specifically; therefore, many governments are working through the questions related to performance and reliability and its implications for government. Government professionals are raising questions about the consequences of relying too heavily or solely on third party providers for dissemination of vital government information such as emergency alerts.

The potential impact on privacy was not foremost on the minds of most government professionals we spoke with, however, our research tells us it remains an important consideration. According to analyses by Electronic Privacy Information Center (EPIC), only several of the negotiated contracts by GSA make an explicit reference to the vendor's obligation to comply with existing privacy and freedom of information laws⁴. The inconsistent treatment of privacy laws is troubling for some, who reference the obligation of the federal government to ensure that all data collection practices comply with these laws. The Privacy Act of 1974 is the founding legislation, and assures American citizens the ability to gain access to and amend records maintained on them by the Federal government and constrains government's use of personally identifiable information of citizens.

Similarly, concerns about records retention are slowly moving away from "do we classify social media content as a record" to "what is the best strategy for making sure we retain the records we are legally obliged to retain." Every state in the US enacted their own freedom of information laws in response to the 1966 federal Freedom of Information Act (FOIA). The definition of what constitutes a record varies from state to state. In the state of New York, a record is defined as "any information kept, held, filed, produced or reproduced by, with or for an agency or the state legislature, in any physical form whatsoever".⁵ Governments are erring on the side of caution and many consider all communication on social media sites a record. What is problematic is finding ways to archive records produced in connection with a particular social media site and devising a strategy for making sure that an agency retains only those records they are legally obliged to retain.

Some governments are addressing this issue by referencing existing records retention schedules or e-discovery guidelines in their social media policies. Existing record retention schedules apply to social media content, just as they apply to emails or feedback received via a comment box on agency web site. Archiving content on social media sites is a relatively new issue. Some practices include simply cutting and pasting for very low volume sites, while others are turning to new tools and services that are becoming available. For example, the US National Aeronautics and Space Administration is using Archive-IT to archive all its social media interactions, including Facebook, Twitter, YouTube, and Flickr. In August 2009, the Executive Office of the President issued a Request for Proposals (RFP) for an automated process to capture, extract, and store information posted by White House employees on publicly accessible web sites, including Facebook and Twitter.

Security threats stemming from social media use are also getting new consideration. The Federal CIO Council issued a security white paper⁶ outlining three main risks - spear phishing, social engineering attacks, and web application attacks - and their recommended mitigation strategies. State governments are also creating their own security policies. There seems to be a broad agreement that security threats with respect to social media, similar to email, are largely behavioral in nature. The threat of confidential information being released, whether inadvertently or by a rogue employee was also a concern. Governments are examining mitigation strategies that closely mirror strategies for safeguarding email use, such as user training on safe use of social media tools or maintaining anti-virus software, robust patch management systems, and standard network security infrastructure solutions including firewalls and intrusion detection.

“There is an inherent level of trust built into social media tools. Because these tools were built for collaboration and cooperation on a personal level and not with security in mind, their users are more susceptible to attack.”

Information Security Officer, State agency

Moving from experimentation to value creation

Governments across the US continue to struggle with how to define success and how to assess value in social media initiatives. The reasons are twofold: first, the tools are relatively new and many are still in the experimentation stage, and second, social media initiatives are generally part of a broader communication strategy for the agency. As with many IT investments, it is difficult to decouple the costs and value of social media technologies and the strategies that employ them, without well defined outcomes or success measures. However, we still know very little about how social media can and does work in government and how common concepts such as “transparency,” “collaboration,” and “citizen services” will need to be reinterpreted and new success measures created to fit this landscape. It is clear that social media offers many potential benefits, but deriving public value from these technology investments requires a “smart approach.” The challenge for government officials and citizens alike is that the question, “does social media use in government create new value for citizens”? has not yet been systematically answered.

“Within the last year, we’ve moved from just experimenting and piloting to really asking the tough questions, how much business value is it creating? And why are we spending public money on it?”

P.K. Agarwal, Officer of Technology Services, State of California

“Have we changed government by virtue of having that communication? It’s great to get all this feedback, but have we [government] changed the way we behave because of that? I don’t have a good answer for that yet.”

Teri Taki, Chief Information Officer, State of California

Case Study #2

Australia: Engaging in Government 2.0

Introduction

Australia is eager to benefit from what it considers to be the multiple benefits of web 2.0, considering that this new technology will be critical to supporting a ten year National Innovation Agenda, the goal of which is to “create a better Australia – a fairer, richer, healthier and greener Australia that can meet the challenges and grasp the opportunities of the twenty-first century.”

This case study describes the vision of web 2.0 being proposed for Australia and explores how it is expected to contribute to the state’s long term objective of increased competitiveness through innovation. The study is based on a literature review and email correspondence with government officials.

Overview

The government of the Commonwealth of Australia has stated that innovation and competitiveness are its priorities for the 21st century. A number of studies and initiatives are providing an intellectually synchronous and mutually supporting approach to prepare for and reach this goal. In 2007, OpenAustralia⁷, a non-partisan website run by volunteers was launched with the publicly-stated goal of making information from Parliament more accessible to citizens. It pushed the envelope with regards to the principle of making government more open through technology. It was built so that users could easily follow topics of interest and was able to get permission to reprint Hansard in a more readable and searchable format.

In 2009, a report entitled *Powering Ideas, an Innovation Agenda for the 21st Century*⁸ was released by Senator Kim Carr, Minister for Innovation, Industry, Science and Research. The report noted that “(i) nvesting in innovation is ... one of the most effective ways we can cushion Australia against the effects of the global downturn.”

The report took a long-term and comprehensive view of the innovation challenge, noting that sustained commitment, possibly for decades, will be required to improve Australia’s competitiveness. With reference to the topic at hand, it proposed as a priority more “effective dissemination of new technologies, processes and ideas.” It linked this concern to the development of more efficient and effective public administration, calling for public sector modernization that included a more coordinated approach to Commonwealth information management, innovation and citizen engagement.

In November, 2009, the Australian Public Service Commission released guidelines for the use of web 2.0 technologies by public servants that acknowledged the power of new technologies and encouraged their use for citizen consultation and improved government decision-making and program implementation.⁹

What appears to be happening in Australia is that an integrated vision of the use of social media to facilitate change is unfolding in support of Australia's future goal of becoming a competitive and innovative society, with core elements that include a renewed, reformed and empowered public service, much of which is enabled by, and built upon the promise and technology of web 2.0.

Status Report

Within this context, the Government 2.0 Taskforce was set up to examine the promise of web 2.0 for government and to make recommendations on how it can be harnessed to contribute to meeting Australia's innovation objectives and released its report in December, 2009.¹⁰ Through its title alone (*Engage: Getting on with Government 2.0*) the taskforce takes the concept and name of web 2.0 and turns it into an all-of-government approach to new technology. It argues that the government should commit to harnessing the benefits of social media as an enabler and calls for nothing less than a "Declaration of Open Government" that would indicate clearly the government's commitment to pursuing the promise of web 2.0 technology in order to achieve a more consultative and transparent government, to realize the full value of public sector information and to link technology of web 2.0 into the government's broader reform agenda.

Citizen Engagement

Historically, Australia has been a pioneer in the concept of a citizen-centred approach to government. A prime example is Centrelink which has a mandate to serve "Australia by assisting people to become self-sufficient and supporting those in need."¹¹ The organisation was formed in 1997 with the restructuring of four government organizations and has led the way in the provision of integrated, seamless service to citizens, using a multi-channel approach that includes the World Wide Web.

The vision of web 2.0 put forward by the taskforce builds on the country's commitment to citizen-centred government, arguing that such a concept implies putting the citizen at the centre of "the entire public service endeavor" through online engagement and empowerment. The taskforce notes that the public sector uses unified collaboration and communication technology less than any other sector at 33%. (The highest are the financial services and high tech sectors at 51% each). The taskforce therefore calls for a commitment by the public service to increase collaboration with the public, and not surprisingly argues that web 2.0 can promote this culture change because of its ability to facilitate collaboration through new online tools.

Reiterating the importance of citizen engagement, the taskforce promotes the using of web 2.0 tools to

build communities of interest so that people can work together to solve common problems. This implies not only citizen to citizen but citizen to government engagement. There is therefore a recommendation that a “lead agency” be created to oversee the implementation and use of web 2.0 in the government, and that it be charged with provide guidelines for the use of online engagement by departmental agencies and require them to report on progress.

Reformed Management of Government (Open Government)

Some have argued that if web 2.0 technologies are to become integrated into the machinery of government then a culture of trust will need to be developed in the public service. A culture of trust is designed to enable employees to pursue the open discussions that the technology implies within the confines of typical organizational structures. The taskforce argues that the operative concept is ‘engagement’, arguing that the capacity that web 2.0 offers can be used to liberate public servants, promote collaboration between the public sector and citizens, and share information.

The vision is based on the notion that public sector information is a resource, the release of which will maximize its social and economic value to citizens. The outcome of this vision is nothing less than web 2.0 becoming the enabler that facilitates radical reform of a public sector culture and governance structure that is now based on silos and hierarchical decision-making. When used by citizens and public servants to promote discussion and share information, social media tools can break down organizational barriers within government as well as those that exist between the public service and the public.

The taskforce report acknowledges that there is a risk in using web 2.0 technologies to reform the Australian public service and to push it toward an environment of open consultation and collaboration. This is a concern of many governments, who worry that opening up the collaborative and consultative tools of web 2.0 will create too high a danger for the institutions, the bureaucracy and individual public servants in part because the distinction between public and private roles might become blurred. The taskforce promotes a middle ground in which codes of conduct and other guidance tools exist but which in the end trusts that public servants “have an intuitive ‘feel’ for how these apply as they negotiate the public space of the internet in ‘real time’.”¹²

Specifically, the taskforces expresses concern that the current guidelines outlined by the Australian Public Service (APS) focus too much on mitigating risk rather than on addressing how public servants should utilize the benefits of social media and goes so far as to suggest that in “the right context, particularly where it was not some matter of heated party political debate, a public servant might discuss their own professional judgment as to the pros and cons of various policy options, providing it was clear that they accepted whatever view the government of the day or their agency had or might come to.”¹³

There are also security concerns. The report notes that the Information Security Manual (ISM) specifically warns against the use of blogs and websites and recommends that specific guidance be prepared so that agencies can make informed and appropriate decisions regarding the implementation and use of web 2.0 technologies.

Best practice suggests that change initiatives require sustained and focused leadership. As noted above, the taskforce vision includes the creation of a lead agency that will be accountable for reinforcing the “practices, habits and tools of Government 2.0” and making sure that the Government 2.0 agenda “is part of the government’s larger ambitions for public sector reform and public innovation.”¹⁴ It proposes an ambitious intergovernmental approach that would not only include the Commonwealth government but would involve the country’s states through the Council of Australian Governments.

Open Access to Government

Perhaps the most radical aspect of the taskforce’s vision for the Australian government regarding the use of web 2.0 is its approach to the use of government information, what is called public sector information or PSI in the report. The taskforce considers public information to be a national resource and explores ways in which web 2.0 technology can harness it for social and economic profit. A series of steps are proposed that would open up information in ways that would make it both practical and useable to the public and to public servants, setting the stage for innovation and reform in the public service as well as commercial and research communities.

The taskforce argues that government information should be distributed free so that these three communities can add value to it. It is promoting a radical change from how government information is perceived in Canada, for example, where it is seen as a product that is owned by the government rather than by the citizens. The implication of the Canadian position is that the default position regarding access becomes to guard or gain Crown profit from it rather than to release it.

The report cites with approval initiatives in the UK and the United States that are reframing the concept of government information as a public rather than government resource and espouses the principle of open distribution, arguing that “the increased corporate and individual taxes on additional economic activity outweighs any revenue losses from moving from charging for PSI to distributing it free of charge.”¹⁵

The taskforce also believes that though there are economic benefits to defining government information as a public resource and thus defaulting to a release mode, there are also social ones, pointing out how web 2.0 capacity has allowed cultural institutions such as the National Library of Australia and the Australian War Memorial to open up their materials so that people can see them online. A specific project that is approvingly highlighted describes the Library’s Newspaper Digitisation Program that has scanned historic Australian newspapers and put them online so that errors could be corrected. Over six million lines have been altered to date.¹⁶

The report discusses the importance of information management, calling for a “sound culture of information and records management” that focuses on issues of reuse and record integrity, use of third party sites and the preservation and use of open digital formats. A submission from the Australian National Archives notes that it has created a digital archive to ensure that records of archival value are preserved in formats that can be preserved and accessed regardless of future technological change.

Just as there are concerns regarding the unleashing of web 2.0 technologies to modernize government, so there are concerns regarding the releasing of public sector information. Stated concerns include the possibility of external bodies using public sector information to add value or deliver services, thus effectively becoming intermediaries between government agencies and the citizens they serve. Similarly, as noted, there are concerns about the quality of information released and the possibility that it could create embarrassment and thus increase organizational risk. While the report acknowledges these concerns, it argues that they are not valid enough to maintain a culture of limiting access to government information.

Regarding privacy and confidentiality, the report acknowledges the issues around personal privacy and commercial in-confidence information of business, admitting that these concerns could slow down the release of information. It calls for guidelines to assist agencies, specifically when it comes to managing confidential data.

In sum, the report proposes that public sector information, by default, should be free, based on open standards, easily findable and understandable, machine readable, and freely usable and transformable. There is also significant analysis regarding the licensing, copyright and metadata standard challenges that the government will face both across the public sector and on a case-by-case basis when creating the recommended pro-disclosure environment that liberates government information by treating it as a national asset.

Leadership

Change takes time, especially broad ranging change that involves cultural change at many levels, both technological and social. Change of this magnitude requires leadership that is committed, long-term and empowered to act.

The report's proposal for the creation of a lead agency that would replace the fragmented leadership of the current government structure is intended to address this issue. The agency would be called the Office of the Information Commissioner and would be responsible for policy development, advice and advocacy regarding social media. It would have the power to undertake performance audits and public reporting on government departments against a revised *Freedom of Information Act*. According to the report, it must be a central agency with enough authority to ensure that change happens across the Australian Public Service.

Government Response

The government has taken the report under advisement. Subsequent to its tabling, the Cabinet Secretary announced in early March 2010 that he had received a report of the Senate Standing Committee on Finance and Public Administration that endorsed the objectives of the government to implement a pro-

disclosure culture across government. He announced that the *Freedom of Information (Reform) Bill 2009* is expected before the Senate next sitting.

The government has also demonstrated its commitment by the appointment of an Information Commissioner designate to provide leadership in the implementation of web 2.0. *The Commissioner's Bill 2009* will also be brought before the Senate's next sitting.

Government 2.0 Taskforce Terms of Reference

The Government 2.0 Taskforce ('Taskforce') will advise and assist the Government to:

- make government information more accessible and usable — to establish a pro-disclosure culture around non-sensitive public sector information;
- make government more consultative, participatory and transparent — to maximise the extent to which government utilises the views, knowledge and resources of the general community;
- build a culture of online innovation within Government — to ensure that government is receptive to the possibilities created by new collaborative technologies and uses them to advance its ambition to continually improve the way it operates;
- promote collaboration across agencies with respect to online and information initiatives — to ensure that efficiencies, innovations, knowledge and enthusiasm are shared on a platform of open standards; and
- identify and/or trial initiatives that may achieve or demonstrate how to accomplish the above objectives.

The Taskforce will advise Government on structural barriers that prevent, and policies to promote, greater information disclosure, digital innovation and online engagement including the division of responsibilities for, and overall coordination of, these issues within government.

The Taskforce will work with the public, private, cultural and not for profit sectors to fund and develop seed projects that demonstrate the potential of proactive information disclosure and digital engagement for government. ...

In particular the Taskforce will also identify policies and frameworks to assist the Information Commissioner and other agencies in:

- developing and managing a whole of government information publication scheme to encourage greater disclosure of public sector information;

- extending opportunities for the reuse of government information, and considering the terms of that use, to maximise the beneficial flow of that information and facilitate productive applications of government information to the greatest possible extent;
- encouraging effective online innovation, consultation and engagement by government, including by drawing on the lessons of the Government's online consultation trials and any initiatives undertaken by the Taskforce.

The Taskforce will meet regularly, consulting in an open and transparent manner and use online solutions for its engagement wherever possible.

Case Study #3

The United Kingdom Experience

Digital technology has revolutionized the way in which people communicate and share information at the personal, business, and public sector levels. The British government understands that civil servants (the British term) need to understand these changes so that they can operate effectively in the dynamic social media environment.

For several years the five national government CIOs of the USA, Britain, New Zealand, Australia and Canada have been meeting to share experience and ideas and to discuss the way ahead. Therefore, variances are a matter of emphasis and much of what is underway in one country is underway in all five countries.

The U.K. appears to be more formalized on the management of social media – that is, they have more protocols and guidance for civil servants. The Central Office of Information (COI) published a 12 page guide in March 2009.

Guidance for Civil Servant Use of Social Media

1. Be credible, accurate, fair, thorough, transparent.
2. Be consistent – encourage constructive criticism and deliberation. Be cordial, honest and professional at all times, participate as you would in other forums.
3. Be responsive.
4. Be integrated. Align with other communication media and departments.
5. Be a civil servant – you are an ambassador for your organization. Disclose your position. Follow the Civil Service Code.
6. Remember that whatever you say online becomes a permanent record open to being re-published in other media.

Although there appears to be consensus regarding the term “social media,” they specify it: “online technologies and practices that are used to share opinions and information, promote discussion and build relationships.”

Government social media users are warned that “the use of SM in itself does not make for good practice. In order to be effective, initiatives must form part of a wider communications strategy and bring some tangible benefits.”

The government has taken steps to embrace social media tools to promote the free flow of information and seek interaction with citizens. For example, the sustainable development commission has a panel of 500 multi-discipline stakeholders that it regularly asks questions of. Similarly, the Prime Minister accepts questions and advice via www.number10.gov.uk.

Britain has clearly accepted the notion of using technology to transform government services but places less emphasis on using it to transform government (that is, to produce cultural change within the civil service). Still, cultural and staff behaviour change are part of the expectations.

The U.K. has been emphasizing simplification by reducing the number of government websites, issuing guidance that is applicable across all departments, verifying accessibility and compatibility of government sites with Google and Yahoo search engines, and researching successes.

Policy Development

With regard to policy development, the UK government argues that it is not just a matter of “build it and they will come” by creating websites for consultation. Building on the principle of citizen engagement, policy makers are responsible for using technology (and other means) to make “inroads into networks of consumers, citizens, and service users.” Policy input is to be through government sites and through reaching out to third party sites.

Connecting Civil Servants

The British government has actively supported the use of technology to encourage interconnectedness of civil servants. Examples include www.Pages.civilservice.gov.uk, a networking site with at last count only 3,000 users and www.Wiki.gsi.gov.uk, a collaboration and knowledge sharing site internal to government. Another site, www.communities.idea.gov.uk hosts communities of practice that cut across national and municipal governments.

Management Strategy The Power of Information Task Force

Canada is familiar with the use of task forces, for example the Prime Minister's Task Force on the Public Service. The British used a similar approach regarding the exploration and implementation of social media, setting up The Power of Information Task Force, which, after submitting its report in early 2009, morphed into the more permanent Advisory Panel on Public Sector Information. Further indication of the priority that the British government is placing on new technology is seen by the creation of a new Cabinet post, the Minister for Digital Engagement.

The Task Force practiced what they preached, using a collaborative approach that culminated in an openly drafted final report. They articulated the following key government uses for social media:

1. Open Information: public information published in easy-to-find, easy-to-use ways.
2. Open Feedback: give everyone their fair say.
3. Open Conversation: engagement between citizens and civil service.
4. Open Innovation: bring innovative concepts into mainstream practice.

The Task Force and the Minister agree that distributed information is empowering. They argue that open information strengthens democracy and also creates social and economic wealth. "Basic data should be available for (re)use free of charge to all" according to the Minister's response to the Task Force recommendations. "There is much that can be done quickly and at relatively little cost to enable government information for re-use using the web." The government acted: RDFa tools are being used; www.data.gov.uk was created as a comprehensive source of government data accessible to citizens; additional funding was given to the National Archives in support of open information.

Government Knows Best Versus Open Feedback

The Power of Information Task Force made the connection between the role of new technology in promoting open information sharing, collaboration and consultation and the changing role of the government in the areas of information and expertise when it observed that "we have moved decisively away from the idea that the State alone can decide how public services will be designed and delivered."

The government is continuing to develop channels so that the public can shape services and service delivery. Processes are being modeled after social media customer-driven service improvement initiatives such as "Show us a better way", "Dell Ideastorm" and "Apps for Democracy."

The Faceless Public Servant

Part of engaging in conversation is getting to know each other. Typically, civil servants have been anonymous. The British government realizes that a new paradigm is unfolding, in part due to the power of social media, accepting that to engage in dialogue, civil servants must be known. Thus, UK public servants are encouraged to get out to public meetings, enter third party online discussions as well as be present on government websites. After assessing the risks and benefits, departments are to open up internet access and place trust in their staff.

Open Innovation

The Task Force recognized that “the web is developing all the time; so are ideas about how it and public sector information could be used.” It recommended that government strive to be on the leading edge, doing its own research and development as well as seeking private sector input and academic input.

The UK government appears to be embracing social media, driven by the four uses of open information, open feedback, open conversation, and open innovation. The purposes are to collaborate within and across the civil service, to be open to the public, to seek and listen to public input, and to realize social and economic benefits from these actions.

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The Institute of Public Administration of Canada (IPAC), founded in 1947, is a dynamic association of public servants, academics, and others interested in public administration. Rooted by its Regional Groups, IPAC is a membership-based organization that creates effective knowledge networks and leads public administration research in Canada. Since the early 1990s, it has been a major player in exporting successful Canadian public sector expertise around the world.



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