

**Staying Free From “Corporate Marketing Machines”
Library Policy for Web 2.0 Tools**

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Abstract

With the rise of social media, libraries are able to use Web 2.0 tools not only for communication and services, but also for marketing and advertising these services. Boundaries between personal and professional, however, can be blurred when librarians use personal accounts for professional reasons. Policy documents to guide librarians in their use of social media are lacking, but policies stored in SocialMediaGovernance.com’s database can provide insight on best-practices policies for social media use in similar environments. This paper assesses the content of policies created by non-profits and government-sponsored institutions and uses these as the basis for recommendations for social media policy in libraries. By clearly defining the use of Web 2.0 technologies in libraries, librarians can be empowered to embrace these new technologies and to rely on their own informed judgment when putting them to use.

Résumé

Avec l’essor des médias sociaux, une bibliothèque peut actuellement se servir des outils Web 2 non seulement pour la communication et comme plate-forme des services, mais aussi pour le marketing et pour la publicité de ces services. Les frontières entre le personnel et le professionnel peuvent toutefois devenir moins nettes lorsque les bibliothécaires se servent des comptes personnels pour des raisons professionnelles. De la documentation manque pour guider les bibliothécaires dans l’utilisation des médias sociaux, mais des politiques contenues dans la base de données SocialMediaGovernance.com peuvent combler cette lacune en indiquant de meilleures pratiques en ce qui concerne les médias sociaux dans des environnements connexes. Pour arriver à un jeu de sujets à aborder dans sa politique de bibliothèque, cette étude prend en considération les politiques des institutions à but non lucratif et des institutions gouvernementales. En définissant clairement l’usage des technologies Web 2 dans les bibliothèques, les bibliothécaires auront le pouvoir d’accepter ces technologies et ils auront la confiance de les mettre en œuvre judicieusement.

Introduction

Libraries have made use of technology throughout their history, and the present time offers new opportunities for integrating Web technologies with standard workloads. Libraries are unique in that they, by definition, will support the information needs of users from some other institution such as a country, a municipality, a university, or a business. Dependant on other institutions for funding and working in the service of these parent organizations, libraries will have unique needs when it comes to creating policy that will simultaneously meet the needs of the parent organization and meet the needs of users of the library services. The establishment of policy to guide librarians in their use of Web 2.0 tools is no different.

This paper will begin with a discussion of social media in general and will take a brief look at two examples of social media tools, Facebook and Twitter. In light of the potential for blurring of boundaries when librarians use social media tools in their work, we then look to the SocialMediaGovernance.com policy database to see what other non-profits and government organizations suggest in terms of policy for social media use. Taking the most commonly used elements found in policies housed in the database, we then suggest how these elements might be considered when creating policy documents for libraries. Finally, we conclude with thoughts about the use of social media in libraries.

Social Media

Social media are a large subset of social Web 2.0 technologies, some of which may be enjoyed through SMS features of standard mobile phones. For the purpose of this paper, we will de-emphasize the mode of access, and consider social media to be Web 2.0 technologies that highlight the individual user and his or her connections to other individuals. Online connections take place through sites that use easily-mastered Web 2.0 authoring, messaging, and sharing tools. Web 2.0 tools make social media user-friendly and socially enjoyable – a space for users to exploit their social networks while demonstrating their creativity, preferences, and unique personalities. Users create accounts and in many cases, identify friends or networks of other users, and interact by creating or uploading content, commenting posted content, and sending messages. Social media include social networking sites like Facebook and Twitter, but can also be considered to include video- or photo-sharing sites like YouTube or Flickr, location-based mobile applications like Gowalla and FourSquare, and Web 2.0 tools like blogs and wikis. Besides being used for communication between peers, these tools are being used by businesses and non-profits for marketing and promotion.

Two commonly used and much-discussed social media sites are Facebook and Twitter. Facebook is the preeminent social networking site in the world with over 500 million active users, 50% of whom will log on in a given day, and 70% of whom are located outside of the United States[1]. Facebook users log into an account, personalize that account, connect with members of their networks, show support for organizations they like, broadcast their own brief comments, post comments to pages of members of their network, send messages, and show their support by indicating that they “like” certain content. They can also organize gatherings or post photos or videos. Many other similar sites exist that may be used in more or less the same way around the world. Like Facebook, Twitter is also gaining attention both in and out of libraries. Twitter is a site permitting microblogging, where users publish updates of 140 characters or fewer called a

“tweet”. In April 2010, it was reported that Twitter had 106 million users, and Twitter usage is on the rise[2]. On July 31, the 20 billionth tweet was posted on Twitter.[3] Lindy Brown has compiled lists of United States libraries[4] and international libraries[5] using Twitter for communication. The two lists enumerate 817 libraries, demonstrating that a wide range and significant number of libraries are using Twitter around the globe.

Both Facebook and Twitter are currently being used for marketing and promotion of a variety of products and services. Products such as Coca-Cola (8,081,127 users “Like” Coca-Cola[6]) and businesses such as IKEA (96,352 users “Like” IKEA[7]) can have fan pages in Facebook where users can publically show their loyalty, and where companies can post information and coupons, and answer questions. Twitter account holders can “follow” the tweets of favorite companies, and can create lists of accounts that post entertaining or useful tweets. Twitter has published “Twitter 101”, a guide for businesses on how to make the most of Twitter (<http://business.twitter.com/twitter101/>). Starbucks is one company making use of Twitter, and has 961,624 followers[8]. Because these companies are already engaging in advertising and are already managing branding of the name and their products, new online venues like social media that offer unpaid advertising are easily exploited. Libraries and other non-profits have also made forays for the purpose of marketing (services, events, fundraisers, etc.). A delicate balance needs to be struck for users who are in these spaces to enjoy themselves, but who want to receive communication, show support, express their own unique likes and personality, and be entertained. In this paper, we focus on Facebook and Twitter as examples of social media sites used by libraries for marketing that will benefit from across-the-board guidelines and from formal institution-specific policy.

Librarians as Social Creatures

With the rise of social media, Web 2.0 technologies are increasingly being used as important outreach tools for all kinds of libraries, and these tools are ones that patrons are coming to expect. In libraries, use of new media means that a new set of skills must be acquired by librarians in order to meet the needs of their users (i.e. Murphy & Moulaison, 2009). As in the recent past, librarians can apply their own Internet and Web 2.0 skills to the creation and maintenance of new library services that take advantage of these technologies. Farkas (2009) points out that when this happens with social media, though, there can be a blurring of boundaries. Librarians with social media accounts in their own name will already be connected to others not related to their work. When private posts from a librarian’s personal account are about work, and when those posts are negative or unprofessional, the reputation of the employer can suffer (Farkas, 2009, p. 35). The greatest amount of overlap between personal and private currently is in the realm of social media, and all Web 2.0 interactions between librarians and patrons can benefit from guidelines and policy documents that assist in understanding how these new technologies should be used.

Web Search for Library Policy and Social Media Guidelines

While it is understood that policy for social media use in libraries is important, a dearth of information specific to libraries is available. In her article, Grensing-Pophal (2010) writes about the importance of social media policy in general terms, but does not look at specifics as they relate to libraries. In an attempt to understand how library institutions are approaching the task of social

media policy creation, we carried out a Web search. The goal was to see what kinds of policy documents or guidelines for interactions were posted to assist librarians in their use of Web 2.0 tools and social media as part of library outreach services and marketing. The web searches we carried out were brief and exploratory, for the purposes of gaining a sense of the available information. Searches were carried out in both English and French in North America in the months of May and July, 2010. Informal observations from this search are the following:

- Libraries have not made a priority of posting Web 2.0 tools or social media policy/guidelines for employees on the open Web
- Libraries are more concerned with posting Web 2.0 and social media policy/guidelines for patrons
- No documentation in French was discovered, only documentation in English

Based on this brief exercise, we conclude that libraries either have created Web 2.0 and social media policy documents and guidelines for staff and have posted them to locations that are not freely available on the Web, or that libraries have not yet created these policies or guidelines. Either way, there is little for libraries at large to use as a basis for the creation of such documents at the present time.

SocialMediaGovernance.com's Policy Database

Taking a step back from libraries, it is possible to study the big picture of Web 2.0 and social media use by looking at policy documents posted online to the repository of policy documents hosted at SocialMediaGovernance.com. SocialMediaGovernance.com is a site devoted to social media policy documents from around the world, and also includes reports on the topic that are international in scope and a report based on the contents of the database.

Analysis of Non-Profit Policies

It is possible to look more closely at non-profits and government organizations' policy documents in the SocialMediaGovernance.com database, as the policies uploaded to the site are organized by type of industry[9]. Because non-profits and governments have the most in common with standard libraries, this group of organizations was chosen.

A total of 44 nonprofits and government organizations have uploaded policy documents to the clearinghouse. Of those, seven dealt exclusively with blogs or wikis and were discarded for the purpose of this paper. Seven additional policies were excluded after inspection because they dealt more with the public interacting with social media than with employees interacting with social media, and four policies were combined into two because they were by the same organization. In total, 28 policies were studied.

The policies studied were quite diverse both in terms of the organizations they represent and the size and scope of the documents. The policies range from the Spanish autonomous community of Catalonia, to universities, to churches, to branches of the United States military. Some of the policies are only a page long while others are 80+ page long documents like the *Guide to Online Participation* created by the New Zealand State Services Commission. The diversity of the

policies makes it quite difficult to compare and contrast the policies, but there are still a significant number of similarities between most of the policies and certain themes that were repeated.

An analysis of the 28 selected policies identified eleven predominant themes. These themes are:

- Branding, discloser, and disclaimers (n=26)
- Professionalism and demeanor (n=23)
- Guidelines about interacting with the public (including moderating comments) (n=19)
- Content (type of content to post or not to post) (n=19)
- Legal concerns (include record retention, copyright, and privacy laws) (n=19)
- Approval process of social media use (including who and why) (n=18)
- Personal use of social media (n=15)
- Aligning social media presence with organizational mission and goals (n=14)
- Best practices (including knowing your audience) (n=11)
- Evaluation of social media presence (n=10)
- Training (n=6)

Branding, discloser, and disclaimers. It is probably not surprising that over 90% of polices analyzed mentioned something to do with branding, disclosing affiliation, and including disclaimers. Although most of the policies mentioned these themes, the extent to which they were discussed varied. Some policies specified use of organizational colors, logos and mottos and others went into the detail of how to construct user names. Most of the policies called for social media users to be transparent and include their name, position within the organization, and contact information. A typical example involving disclosure comes from the Australian Public Service Commission. Their policy states that “staff making official use of online media should disclose their position and status and the fact that they are authorised to communicate an official viewpoint.” [10]

Professionalism and demeanor. More than 80% of polices included statements about keeping a professional demeanor when participating on social media sites. Some of the policies offered general descriptions such as being respectful while others like the (US) National Public Radio (NPR) policy where more descriptive. NPR’s policy includes language stating “you should do nothing that could undermine your credibility with the public, damage NPR’s standing as an impartial source of news, or otherwise jeopardize NPR’s reputation.” [11]

Guidelines about interacting with the public (including moderating comments). Almost 70% of the policies include guidelines about interacting with the public. These including things like being courteous and truthful and are accompanied by guidelines to be followed when approving or deleting comments on Facebook and blogs. One policy also included information about “friending” people on social media sites. It is likely that this organization, BBYO, did this in part because they are a leadership organization for teenagers.

Content (type of content to post or not to post). A majority of the policies included some information about the content of postings. Many of them included statements about posting

truthful and accurate content. Other's included statements like New Zealand State Services Commission's policy that said employees should "only disclose information in your official capacity that you are authorized to disclose"[12] A common aspect of policies from governmental organizations was to remain politically neutral and to not say anything that could be constituted as supporting a particular political party.

Legal concerns (include record retention, copyright, and privacy laws). Many of the policies mentioned various legal requirements and concerns. The most common one by far was about respecting copyright. One thing that was not included in many policies, however, was the copyright status of anything posted on a social media site. This may be because ownership of intellectual content of employee work is covered in other policies. While it was not analyzed for this study because it focuses solely on blogs, one policy that does talk about copyright of postings is the Weblogs at Harvard Law School Terms of Use[13]. These terms of use say that the default license for anything posted is copyrightable by the author and is submitted under the terms of an Attribution-Share Alike Creative Commons Public License. If a library or parent organization does not already have a copyright policy for employee work, it may want to make this policy clear in any policy created. Many of the policies from governmental agencies also included statements about public record retention policies and procedures and privacy laws such as the United States' Family Educational Rights and Privacy Act (FERPA).

Approval process of social media use (including who and why). More than half of the policies discussed the approval process for creating organizational accounts and presence on social media sites. The particular processes varied greatly from one policy stating that the "Public Affairs Office must review and approve all [content] prior to posting"[14] to Vanderbilt University's policy stating one should "secure the approval of your department head or manager." [15]

Personal use of social media. Just over half of the policies discuss personal use of social media. It is presumable that the other organizations may have had separate policies for personal use or they may be covered in a different document such as a faculty handbook. None of the policies prohibited the use of social media for personal use but some of them did suggest that staff notify their managers. Another common theme relating to personal use of social media was that employees should not be using organizational time or resources for purely personal activities. The American Red Cross's Online Communications Guidelines states that employees should "uphold the fundamental principles" of the Red Cross during personal use of social media.[16] Many of the policies also referred to other organizational policies such as a code of conduct that may relate to using social media sites for personal reasons.

Aligning social media presence with organizational mission and goals. Half of the policies talk about aligning social media presence with organizational mission and goals. How this was done varied from one short mention to, in the longer documents, suggestions on how to do this. Tufts and Vanderbilt Universities as well as others made it clear that from the beginning employees should define their goals when starting a social media presence.

Best practices (including knowing your audience). Some of the policies, especially the longer ones, included information about best practices. One of the things mentioned along with best practices was "know your audience". Knowing your audience may be particularly important for

more narrowly focused organizations and/or smaller departments. The American Red Cross suggested that people using social media should “learn the culture of social media.”[17] Another theme repeated was that people using social media should remember that, as the United States’ General Services Administration (GSA) policies states, “published content is persistent in the public domain.”[18]

Evaluation of social media presence. Approximately 40% of the policies talked about the need to evaluate the organization’s social media presence. The policies varied as to how to do this, but the ones that went into any detail pointed out the need to plan how you are going to evaluate any new or expanded social media presence before jumping in. Another theme was the need to do ongoing evaluation. For example, if you created a social media presence and you evaluated it after six months, you should continue re-evaluate at regular intervals because the nature of social media is constantly changing and what worked six months or a year ago may not work today.

Training. Just over 20% of the policies mentioned training. How this approached, like other common themes, was varied. Some mentioned exactly where to get training while others mentioned that department heads should make sure that the staff members they authorize to post on social media sites have the proper training.

Suggested Policy Elements for Libraries

In light of the literature cited above and based on the social media policies and guidelines indicated in the SocialMediaGovernance.com’s database, we suggest the following library-specific elements be addressed in formal library policy guiding social media use. The elements are divided into three categories: Management, Creation, and Use of social media. The themes found in the SocialMediaGovernance.com’s policies were listed above by frequency, with the themes appearing in the largest number of policies listed first. The elements that follow represent the repurposing of these themes in a library context. Elements are therefore listed in a way that makes sense to their discussion for inclusion in library policies. Themes taken from the SocialMediaGovernance.com policies are indicated in italics below. The framework being put forth emphasizes the importance of the management elements.

Library social media policies will want to address at least some if not all of the elements presented below:

I. Management (administrative aspects of maintaining a social media presence)

- “Determine Your Objective”[19]

What does it mean to your library to have a successful social media presence?

- *Align social media presence with organizational mission and goals.* Define the role of new media and social media, tying them in to the goals of the institution

Create, as necessary, a set of goals for the use of each social media site

Ensure that enough staff-hours can be devoted to the account’s maintenance once it is in place

- Ensure that the account will be deleted or turned off instead of abandoned if

not successful

- *Approval process of social media use (including who and why).* Specify which employee(s) / team(s) will have new social media responsibilities
 - Direct creation and use of social media accounts, including maintenance
 - Establish social media procedures
 - Handing off responsibilities to another employee
 - Permanently due to personnel changes
 - Temporarily due to leave, vacation, etc.
 - Changing platforms or social media sites
- “Create a tactical road map”[20]
 - Move from beta to production. It is good to allow employees to experiment but at some point any organizational social media presence needs to move from an experimental stage to production. In some cases it may mean that the person that started the account or page may need to hand over the reins to some other person or part of the organization, or allow additional employees administrative access to the account.
- *Training.* Determine education needed to support new media use
 - Provide information literacy instruction in new media for patrons as part of a 21st century skill set
 - Conduct workshops on social media for peer librarians
 - Currently in use by the library
 - Of potential interest to the library
- *Evaluation of social media presence.* Evaluate the use of social media in the library
 - Set a timeframe for evaluations (after 6 months? One year?)
 - Request employee, systems, and patron assessment of social media use and usefulness
 - Establish the return on investment (ROI)
 - By community served (Only homework help?)
 - By point in time (Posts only in summer? Only late at night?)
 - Compared to other uses of staff time (Is it better to create more interactive library Web pages?)
- *Legal concerns (include record retention, copyright, and privacy laws).* Include information about any applicable laws or regulations
 - Intellectual property; Copyright
 - Privacy laws
 - Record retention laws
- *Personal use of social media.* From staff with personal accounts
 - If not addressed elsewhere may be appropriate to include
 - Use of library time and resources for personal social media use

II. Creation (one-time creation and documentation of account information)

- *Branding, discloser, and disclaimers.* Specify who may and under what circumstances
 - Create accounts in the library’s name
 - Specify naming conventions for account names[21]
- Specify where/by whom

Documentation for the account is to be maintained

- Social media website's URL
- Account login and password

Total staff hours researching creation and creating the account will be logged for future evaluation

III. Uses (regular maintenance of library's social media presence)

- *Content (type of content to post or not to post).* Identify services, collections, news, information, etc. that may be advertised/marketed

Indicate information that should consistently be included (information about changes to opening hours, etc.)

Indicate information that is not appropriate (i.e. personnel changes, personal news from staff, etc.)

Consider how patron privacy can be maintained when necessary

- *Best practices (including knowing your audience).* Indicate expectations about

Guidelines about interacting with the public (including moderating comments). Politeness/tone/level of formality

Professionalism and demeanor.

- Use of abbreviations or web conventions for spelling

Personal disclosures including giving names, locations, etc.

Speed of responses to direct questions

Importance in relation to other library services (less important than phone queries, but more important than email questions?)

Instances where employees use their own judgment in responding to difficult or challenging posts, and the spirit informing that judgment

- Provide a link to guidelines as necessary

Implications and Recommendations

A wide range of scenarios can be addressed by library administrators when working through the policy elements above. The resulting policies are meant to assist the librarian in his or her work, and not to restrict him or her. By helping to guide librarians when working in social media environments, these policy elements can at the same time protect them, providing context and rationale for work done on social media. Guidelines for libraries, parent organizations, library associations, and others can be referenced as necessary to help librarians in their professional work.

It should be recognized that social media may not be of interest to all librarians at an institution. It is not necessary for everyone in the library to understand the behind-the-scenes functioning of social media, but it is necessary that any social media service, once put in place, be understood in general terms by an institution's librarians. By formalizing policy, the place that social media will have in the library is made clear; roles and responsibilities are established. Further, mechanisms are in place so that services offered via social media are consistently maintained and promoted to

patrons when appropriate. For many librarians, this will include learning about social media as public relations personnel are doing in other sectors (Cordelier, 2010). Formalization of a policy can ensure that libraries will receive opportunities to have necessary training so that they can go onto educate users in this kind of 21st century skill sets.

Conclusions

In this paper, we described some social media in use in commercial business and described some ways that businesses are using Facebook and Twitter for marketing. When it became clear that libraries have not formalized their policies in a public way, we looked to the policies for non-profits and government organizations housed in the SocialMediaGovernance.com database. With the predominant themes from these policies in mind, we suggested a framework of elements to address in a library's social media policy that deal with management, creation, and use of social media by librarians.

Interacting with patrons in new social media environments can be a worthwhile pursuit for libraries of all kinds. Guiding library employees in the creation and use of these sites is essential, and creating a detailed road map by which these tools, like any other tools in use by the library, may be implemented and assessed is equally important. Social media cannot be left to chance, or librarians may find themselves in difficult positions if the blurred boundaries are inadvertently transgressed. Now is the time to stop using social media experimentally in libraries, and to begin using it in a way that is respectful of our users, our employees, and our mission, as the potentially powerful tool that they are. We believe that presenting librarians with clear guidelines for the management, creation, and use of social media in libraries goes a long way toward making that new goal a reality.

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