# BHL OUTREACH & COMMUNICATION PLAN

A GUIDE TO FULFILLING THE BIODIVERSITY HERITAGE LIBRARY'S
OUTREACH MISSION

**BHL Program Goal 4: Outreach to Users**
**Increase global awareness about the BHL through outreach, learning and education, branding and collaboration with existing and new user communities**

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# AUDIENCES

This section details the various audiences BHL hopes to reach through outreach methods, and the platforms BHL uses that can reach each of these audiences. In general, BHL has an academic audience, as website and outreach metrics dip considerably during summer months, indicating semester breaks and scientists conducting fieldwork, and thus not utilizing BHL as frequency as non-summer months.

## BHL AUDIENCE TYPES SUMMARY

| | | |
|---|---|---|
| Scientists/Researchers | Citizen Scientists/People Interested in Biodiversity | Artists/Art Historians |
| Bibliophiles | Librarians | Taxonomists |
| Techies | Educators | |

See Pew's 2012 analysis of typical social media demographics for general information about typical audience types on each platform (note, this does not necessarily apply to BHL audiences):
http://www.pewinternet.org/Reports/2013/Social-media-users/Social-Networking-Site-Users/Demo-portrait.aspx

## Scientists/Researchers

### Platforms

| | | |
|---|---|---|
| Twitter | Facebook | Flickr |
| Blog | Newsletter | Quarterly Report |
| Conferences | Swag | |

### Topics and Content of Interest

Taxonomic or species information.

The following post types are especially geared towards this audience:
Factoid tweets; tweets about services like PDF generation and name finding algorithms;
Facebook posts and quizzes; BHL User, Book of the Week, and News Update Blog Posts;
Flickr Sets.

These users have shown particular interest in adding species name machine tags to BHL
images, and thus are a good source for crowdsourcing metadata enhancement.

## Citizen Scientists/People Interested in Biodiversity

### Platforms

| | | |
|---|---|---|
| Twitter | Facebook | Flickr |
| Blog | Newsletter | Quarterly Report |
| Conferences | Pinterest | Apple: iTunes U |
| Exhibitions | Swag | |

### Topics and Content of Interest

Factoids and quizzes, as well as biodiversity news stories, are popular among this
audience type. Book of the week posts as well as general project update posts also target
this audience well. This audience also tends to use BHL images frequently, both through
Flickr and Pinterest, so our automatic tweets from Pinterest are of interest to this
audience. This audience is also interested in basic facts about the books that could be
presented via bibliophile-type posts.

## Bibliophiles

### Platforms

| | | |
|---|---|---|
| Twitter | Facebook | Flickr |
| Blog | Newsletter | Pinterest |
| Exhibitions | Apple: iTunes U | |

### Topics and Content of Interest

This audience is particularly interested in the history of the book. Species information as it relates to a publication (i.e. this is the first publication of such and such) thus targets this audience. In particular, BHL content with a spin towards the author or publication history is of interest to this audience. They have also shown interest in BHL's digitization and conservation process, and thus more rare book and posts about workflow are recommended to better reach this audience.

## Artists/Art Historians

### Platforms

| | | |
|---|---|---|
| Flickr | Pinterest | Blog |
| Twitter | Facebook | Conferences |
| Newsletter | Apple: iBooks | Swag |

### Topics and Content of Interest

Artwork and the process used to create that artwork, as well as information about the artists, are of particular interest to artists. Our Flickr and Pinterest collections provide a fantastic background for these users, as well as artist-related tweets and Facebook posts.

These audiences have also shown particular interest in our Flickr-tagging process, as they are often concerned with finding ways to make digital images more accessible.

## Librarians

### Platforms

| Conferences | Newsletter | Twitter |
|---|---|---|
| Blog | Quarterly Report | Swag |

### Topics and Content of Interest

Tweets about our recent additions, and perhaps highlights of our library-type services, are likely of interest to librarians. Blog posts about new permissions received would indicate new resources for librarians, and BHL User interviews with librarians would showcase for librarians how others in their field use BHL. Librarians are also likely interested in the digitization workflow process used by BHL. Our presence at ALA each year is a particular target for librarians.

However, this audience does not interact currently with BHL as regularly as scientists, citizen scientist, bibliophiles, and artists. Thus, more information about their preferences and needs is required.

**Task: Conduct a survey to determine what types of information librarians want,**

**what platforms they want to get that information on, and hashtags they follow.**

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## Taxonomists

### Platforms

| | | |
|---|---|---|
| Listservs | Conferences | Blog |
| Swag | | |

### Topics and Content of Interest

This audience constitutes a core audience of BHL. We know that this audience is interested in taxonomic information and particularly our name-finding algorithm services. We know that they also communicate regularly via Taxacom and participate in the TDWG annual conferences. BHL User posts highlight how other taxonomists are using BHL, so are likely of interest to Taxonomists.

However, this audience does not interact currently with BHL via social media and other outreach methods as regularly as scientists, citizen scientist, bibliophiles, and artists. Since they are a core audience, it is important to discover a better sense of their needs and preferred methods of obtaining information about BHL. Thus, more information about their preferences and needs is required.

**Task: Conduct a survey to determine what types of information taxonomists want, what platforms they want to get that information on, and hashtags they follow.**

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## Techies

### Platforms

| | | |
|---|---|---|
| Twitter | Blog | Conferences |
| Swag | | |

### Topics and Content of Interest

Anecdotal evidence suggests that techies are very active on Twitter, and many follow the BHL Twitter. Thus, a greater effort should be employed to compose content targeting techies on Twitter, possibly led by the BHL TAG. Techies are likely also interested in blog posts about new BHL services, and are likely active in many tech-related conferences. TAG member should be better utilized to reach these audiences, however, it is first important to determine more firmly what types of information these users wants and how they want to get it.

**Task: Conduct a survey to determine what types of information techies want, what platforms they want to get that information on, and hashtags they follow.**

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## Educators

### Platforms

| | | |
|---|---|---|
| Apple: iTunes U & iBooks | Exhibitions | Swag |
| Flickr | Conferences | |

## Topics and Content of Interest

Note: Educators are not a primary audience for BHL. We no longer have a specific education-geared project goal and we do not have the resources, staff, or expertise to develop full-on educational programming for educators to use. We do of course want to target students if we can, but in general these students probably fall into other categories, like citizen scientists/people interested in biodiversity, or even scientists/researchers if they are secondary education. Thus, we will hopefully reach them via the methods for these other audiences. However, Educators could find the iBook and Exhibition content we want to generate useful, so we should identify easy ways to let them know about the resources. We also already know educators are using our Flickr images. It may be a matter of partnering with other projects, like EOL, to utilize their educational outreach and just contribute to their efforts where possible.

BHL's educational outreach will likely focus on iBooks, exhibitions, and Flickr, and as educators are not a primary audience, other information will likely not be pursued.

If the opportunity arises to partner with another project at an educational outlet/conference, it might be worth being present, but BHL will not pursue educational conferences as this area is not a priority for BHL. BHL may continue to host Flickr Tagging Parties as well, which might be of interest to educators.

# PLATFORMS

This section provides details about each of the outreach platforms BHL uses.

All BHL Social Media platforms should link to the SI Terms of Use: http://www.si.edu/termsofuse/

# TWITTER

## Audiences

Scientists/Researchers; Citizen Scientists/People interested in biodiversity; Artists/Art Historians; Bibliophiles; Librarians; Techies.

## Current Evaluation

For the past year, our most popular tweet was a species of the day tweet:

@BioDivLibrary: Believe it or not, people believed this creature 2 be real until Linnaeus exposed it as fake! http://ow.ly/gF9Q4 #bhlib

This tweet posted January 10, 2013. It had 152 clicks on the link. It was retweeted by EOL, NMNH, and Smithsonian Channel and was part of the weekly EOL and NMNH weekly collaboration agreement.

Of the top ten tweets of the past year:

- 4 were species of the day tweets
- The top two were part of the weekly EOL/NMNH collaboration arrangement
- The top three were retweeted
- 4 were retweeted in general
- 2 were blog tweets
- 3 were related to Flickr collections

- 1 was a biodiversity news tweet
- 2 were related to publicity campaigns

**Conclusion:** Collaboration tweets do very well. Species of the day tweets are the most popular type. Project news tweets are not among the most popular on Twitter. Blog tweets also perform well. We saw campaign tweets among the top ten tweets. No Pinterest tweets were among most popular. No trend in topics, but trends in type (i.e. species of the day).

*Since Twitter is one of the two least successful performer out of our four top social media outlets (Twitter, Facebook, Flickr, and the blog) in terms of driving traffic back to BHL, we are particularly interested in ways to improve Twitter performance. Current evaluation shows that collaborations, both active and passive, are the key to tweet success. Therefore, collaborations should be employed whenever possible within tweets.*

The most popular posting time was: 11am, followed by 3pm

*Thus, most popular types of tweets are species of the day and service (image) tweets, with most popular posting times of 11am and 3pm.* Thus, species of the day tweets should publish at 11am; service tweets should publish at 3pm.

On Twitter, retweets/mentions and clicks on links have been steadily increasing each month, with significant increases in Winter/Spring 2013 (as is always seen on our platforms, performance is decreasing slightly for summer months, as compared to non-summer months). Therefore, Twitter's performance as a platform is positively improving.

However, Twitter is still not driving traffic back to BHL as desired. It and the blog are the two least successful social media platforms at doing so. Thus, using language that leaves the user wondering, with a link to BHL as the only way to satisfy their curiosity, is recommended (i.e. "I smell like rotting meat. The flies like it. [insert link]"). To find out what smells like rotting meat, the user must click on the link. This was one of the most successful of our tweets in terms of clicks on link (and thus traffic back to BHL) in the past six months.

## Responsible Parties

**BHL Program Manager**

- Responsibilities:
  - Project News Announcements; Weekly Developer Activities Techie Tweets; Services; Workflow (coordinating with other BHL librarians for content and pictures); Recent Additions; Conferences and Presentation Tweets; Links about BHL mentions on the web or in articles; Blog Tweets.
    - During campaign weeks, tweets will be managed by BHL Technician
    - Program Manager should share workflow-related content/images received with Technician for use on Facebook
  - Scheduling non-campaign related intern tweets if interns do not utilize Hootsuite
  - Downloading BHL Twitter archive on bi-annual basis and storing in S:ISD]BHL\BHL Directorate\Outreach and Communication\Twitter Archive
  - Statistics

**BHL Collections Coordinator**
- Responsibilities:
  - Monitor Twitter daily. Respond to comments to BHL and retweet other tweets when appropriate.
  - Follow appropriate users on Twitter
  - Permissions Tweets
  - Praise to Testimonials wiki
  - Review BHL intern tweets and set to publish
  - Maintain and update Twitter account password, if necessary
  - Change intern Hootsuite password after each intern leaves

**BHL Technician**
- Responsibilities:
  - Coordinating content themes based on calendar (see strategies section)
  - Factoids; Image Highlights; Biodiversity News; Campaign tweets (unless delegated to interns; see strategies section); birthdays and biodiversity holidays tweets
    - During campaign weeks, BHL Technician manages all tweets, including constructing tweets about Flickr, BHL, and iTunes U campaign collections
    - Archiving campaign-related tweets (see campaign section)
  - Scheduling intern campaign related tweets if interns do not utilize Hootsuite
  - Daily tweets for new images pinned to Pinterest.

**BHL Technical Advisory Board (TAG)**
- Responsibilities:

○ TBD specifics, but will develop system whereby TAG members can initiate and foster tech conversations via Twitter.

## Details

All BHL tweets should include the hashtag #bhlib.

Whenever possible, hashtags related to the topics of each tweet should be incorporated. Performing google searches for hashtags related to particular topics is a great way to find hashtags to include. View current trendings hashtags at any given point on this website (http://www.hashtags.org/trending-on-twitter/). Twitter handles for entities associated with the tweet topic (particularly those for BHL member institutions), and associated hashtags with entities and member institutions, should always be incorporated into tweets where possible. It is not necessary to contact these entities to let them know they will be included in tweets unless it is campaign related (see strategies section) or something strongly related to them (like blog post featuring a staffer at their institution or entire BHL collection created from books from this institution). In the latter cases, it may be worthwhile to contact the institution and request that they retweet the BHL tweet.

Whenever possible, include "leading" phrases in tweets to encourage people to click on links to return to BHL (see Current Evaluation section above).

Tweets praising BHL on Twitter should be added to Testimonials wiki page: https://bhl.wikispaces.com/Testimonials (Collections Coordinator)

<u>Types of Posts</u>
- **Factoids** (targets scientists/researchers; citizen scientists/people interested in biodiversity; Artists/Art Historians (when link to images); Bibliophiles (when targeting authors and publications); Librarians (when targeting publications). A factoid is a short bit of information about a species, author, or publication in BHL. All factoids should link to relevant a page, book, or collection in BHL. Include "leading" phrases in tweets to encourage users to click on links to return to BHL (see Current Evaluation section above).
  - Species Factoids
  - Author Factoids
  - Publication Factoids
- **Image Highlights** (targets artists/art historians; citizen scientists and people interested in biodiversity; bibliophiles)
  - These should not only link to an image in BHL, but should try to talk about the image itself, either by pointing out the artist, the process used to create

the image, or the species contained in the image. Include "leading" phrases in tweets to encourage users to click on links to return to BHL (see Current Evaluation section above).

- **Project News Announcements** (targets all Twitter audiences)
  - These will usually link to the blog, but will highlight when important things happen (milestones, new funding), when newsletters release, or when quarterly reports release.
  - These tweets also include information about public presentations or conferences that BHL or its staff are a part of.
- **Biodiversity News** (targets scientists/researchers; citizen scientists)
  - Links to biodiversity news stories. These tweets should also link to a relevant page, book, or collection in BHL. Include "leading" phrases in tweets to encourage users to click on links to return to BHL (see Current Evaluation section above).
- **Tech Conversations** (targets techies; data exports target librarians)
  - Weekly tweets outlining what our developer is working on this week
  - As appropriate, TAG can ask opinions/start conversations about techie things
  - Periodic links to APIs, Data Exports
- **Services** (Targets all Twitter users)
  - Periodic tweets that highlight our services, like Flickr, Pinterest, name finding, APIs, Data Exports, etc., with links to appropriate pages.
  - Also include periodic calls to tag BHL Flickr images
- **Workflow** (targets librarians and maybe bibliophiles)
  - Image-based tweets, showing some part of the digitization workflow. Particularly good to have preservation and pictures showing people actually scanning books. Include handles for BHL partner institutions that contributed the workflow images. Include link in BHL to title of book featured in photo, if known and available.
  - Create image library to pull from.
- **Tweets from Pinterest** (Targets Citizen Scientists/People interested in Biodiversity; Artists/Art Historians; Bibliophiles)
  - Automatic tweets that are sent out when new images are added to Pinterest.
- **Recent Additions** (Targets librarians primarily, but also citizen scientists/people interested in biodiversity and scientists/researchers; maybe techies if want to know about recent content)
  - Tweets that highlight a book in the recent additions feed and link to the feed for more recent additions: http://biodiversitylibrary.org/recent
- **Permissions** (Target Librarians, Scientists/Researchers, maybe Techies)
  - Tweets when we get permission to scan a new in-copyright title. Include

links to title in BHL if some volumes are already available.

- **Blog Tweets** (Targets Citizen Scientists/people interested in Biodiversity; Bibliophiles; Scientists/Researchers; Librarians; Artists/Art Historians (depending on content)
  - Tweet when a new blog post publishes on BHL. These tweets will link to the blog post. **These are specifically non-project news posts, since those are covered in project news tweets. These include Book of the Week and BHL User posts.** At least four tweets for each book of the week blog post should publish, and at least one for the BHL User posts.
- **Guest Blogging Calls:** (Targets all Twitter audiences)
  - On a monthly basis, BHL will send out a tweet calling for guest bloggers. Tell users to express interest via feedback form.
- **BHL User Calls:** (Targets all Twitter audiences)
  - On a monthly basis, BHL will send out a tweet calling for users to interview for the Blog. Tell users to express interest via feedback form.

<u>Schedule</u>

Generally, a minimum of four tweets should go out daily. They publish around the approximate times: 9am, 11am, 1pm, 3pm.

All tweets for BHL should be published or scheduled through the Smithsonian's Enterprise Hootsuite account, to allow BHL Staff to track clicks on links metrics. The si.edu url shortener should NOT be used, as BHL is not an-SI only entity. The built-in Hootsuite ow.ly shortener should instead be used.

Each individual Hootsuite administrator has their own Hootsuite account, through which they can publish tweets for BHL. Each individual is responsible for contacting Brian Alpert (alpertb@si.edu) to obtain Hootsuite accounts and access to the BHL account (exception interns - see intern section below).

Contact the BHL Collections coordinator for the actual BHL Twitter account login information. If password changes are necessary, the Collections Coordinator will oversee the changes.

The BHL Collections Coordinator should monitor Twitter daily, replying to tweets as required and retweeting appropriate tweets during times not already scheduled to have tweets, as outlined below. The Collections Coordinator should also follow people via the BHL Twitter account as appropriate.

**Daily**
- Image Highlight (9am tweet)
- Species Factoid (11am Tweets)
- Biodiversity News (1pm tweet)
- Tweets from Pinterest (approximately two at 8am and two at 2pm)

**Weekly** (3pm Tweets)
- Recent Additions (Monday)
- Tech Conversation (Tuesday; Developer working on - managed by Program Manager)

**Weekly** (varied)
- Book of the Week Blog Post Tweets (Typically Thursday and Friday but also as posts publish; publish at least four tweets per book of the week blog post)
  - Posting Day: 1st Tweet = 10am; 2nd Tweet: 3pm if Thursdays, otherwise 4pm
  - Day After Posting Day: 1st Tweet = 10am; 2nd Tweet = 3pm if Fridays, otherwise 4pm

**Monthly** (3pm Wednesday Tweets)
- Service Tweets: Once a month send out a tweet highlighting a non-techie service
- Image Service Tweet: Once a month send out a tweet highlighting Flickr or Pinterest
- Techie Service Tweets: Once a month send out a tweet highlighting a techie service.
- Guest Blogging Calls
- BHL User Calls

**Monthly**
- BHL User Blog Post Tweets (Typically Tuesdays but also as posts publish; publish at least one tweet per BHL User blog post)
  - Posting Day: 10am

**As Appropriate (12pm)**
- Links to authors and publications as appropriate, as informed by calendar (see below; responsibility BHL Technician; can be in lieu of species factoid or image highlight or in addition)
- Project Updates (link to BHL blog posts, typically)
- Tech Conversations (when something to ask/discuss - managed by TAG)
- Links to conferences or presentations happening by staff or pan-BHL conferences
- Permissions
- Workflow (Program Manager responsible for gathering these and posting as

provided, but probably no more regularly than a monthly basis. When gathered, these pictures and information should also be shared with the BHL Technician for use on Facebook).
- Links to mentions about BHL on the web or in articles (often gleaned from Google Alerts)

**Note: During campaign weeks, all Twitter content will relate to campaigns, and the above schedule will not apply. On campaigns weeks:**

- Daily, two factoid tweets, related to campaign and linking to BHL content: 11am and 3pm
- Four Blog Post tweets, two publishing day of post publication (10am and 1pm) and two day after post publication (10am and 1pm)
- Throughout week, tweets advertising the iTunes U, BHL, and Flickr collections (12pm)

## Choosing Content

Choice of content should be driven by the BHL calendar or campaigns. More information in Strategies section. When a campaign is occurring, all tweets during the week will highlight the campaign topic (see above).

When no specific events are listed on the calendar, topics may be chosen at random. Browsing through the Flickr collection to find interesting images is a good way to identify fodder for a post.
Browsing "This Day in History" and partner library websites for content ideas is also a good option.

## Collaboration and Campaign Tweets

All collaboration tweets should be tagged with the Hootsuite tag "collaboration." All Campaign tweets should be tagged with the Hootsuite tag "campaign" and the custom tag created for that campaign.

## Intern Posts

Interns are responsible for scheduling tweets related to the blog posts they write (4 tweets per blog post), and may be designated to write tweets for campaigns. If interns are

scheduling tweets, either for campaigns or general tweets, they should use the generic BHL Hootsuite account (username biodiversitylibrary@gmail.com; password [contact crowleyb@si.edu). This account has permission to compose tweets and schedule them for review. The Collections Coordinator must then review the tweets and approve for publishing at the appropriate date and time. If these tweets relate to a campaign, the Collections Coordinator should also alert the BHL Technician that they are available.

The intern should link tweets referencing blog posts to the actual blog post, not the general BHL blog. If the tweet is constructed before the actual post publishes, the intern can find the URL for the upcoming post by clicking on the "Permalink" button in the right-hand side of the Blogger post compose screen. This is the link that should be used in the tweet.

The Collections Coordinator should change the password for the BHL Hootsuite account after each intern leaves. The Collections Coordinator is also responsible for providing the BHL Hootsuite account login information as required.

If for some reason the Hootsuite account is not utilized by interns, the intern should send the Twitter fodder to the BHL Program Manager to schedule, unless the content relates to a campaign, in which case the content should be sent to the BHL Technician for scheduling.

Twitter Archive

BHL archives its tweets within Hootsuite. On a bi-yearly basis, the Program Manager should download the BHL Twitter Archive and store it as an excel file within the S:ISD\BHL\BHL Directorate\Outreach and Communication\Social Media Archives\Twitter Archive folder.

## Goals

**Outreach Goal One: Increase awareness about BHL and grow our audience.**
- Followers on Twitter: Measures not only how Twitter is increasing awareness about BHL (by tracking the number of people learning more about BHL through this platform), but also how our BHL audience is growing based on the number of people seeing our content through Twitter.
- Clicks on Links: Twitter links generally return users to BHL, thus reflect increased BHL audience.
- Number of Tweets: Tracks how often we share information with users, but most useful to see how post frequency affects interactions.

**Outreach Goal Two: Keep people informed about project developments, services, and how to use them.**
- The main "metric" for this section would be to capture whether we are actually sending out news updates via Twitter. The plan stipulates that we should, and simply gathering the number of tweets about project updates will not give us meaningful information, so we will not track that. However...
- Popular Tweets: What is meaningful is whether the project news and updates tweets are being interacted with by users. Thus, as part of the bi-annual evaluation (see Evaluation section for more information), the BHL Program Manager will evaluate the performance of individual tweets to determine most successful content types. Special attention should be paid to whether news and update tweets are popular. If they are not, these tweets should still be sent out, but perhaps different hastags or approaches to the tweets should be considered.

**Outreach Goal Three: Raise awareness and foster dialogue within BHL audiences about biodiversity topics and corpus publications using BHL collections.**
- Retweets/Mentions: Reflects both dialogue fostering and awareness building when our users interact with our content.
- Clicks on Links: By clicking on links to our content, people will learn more about a subject via BHL material, thus increasing awareness. Also grows BHL audience (see goal one).
- Popular Tweets: On a bi-annual basis (see Evaluation section for more information), the BHL Program Manager will evaluate the performance of individual tweets to determine most successful content types. Future posting will be adjusted based on these findings.

**Outreach Goal Four: Increase traffic back to BHL from Social Media**
- Visitors to BHL from Twitter: Measures how well Twitter is helping us build our core BHL audience.

Metrics related to Twitter are recorded on a monthly basis in the Monthly Reporting Document. These metrics as measured for progress towards goals, and an evaluation of most popular posts, are then recorded in the bi-annual Outreach Evaluation documents.

## FACEBOOK

### Audiences

Scientists/Researchers; Citizen Scientists/People interested in biodiversity; Artists/Art Historians; Bibliophiles; Librarians (to lesser degree).

According to our Facebook demographics, 52.3% of our users are female; 45.5% male. 1.2% of them are ages 13-17; 9.9% are ages 18-24; 27.6% are ages 25-34 (our greatest percentage); 19.9% are ages 35-44; 20.1% are ages 45-54; 13.6% are ages 55-64; and 5.4% is ages 65+.

So, we are reaching an even mix of males and females, and most of our audience is between the ages of 25-54.

### Current Evaluation

For the past six months, the most popular types of posts on Facebook:
- Quizzes (70%)
- News Stories (30%)

The most popular post was a Project Update Post pointing to the BHL blog:

Hey, our BHL family just got bigger! We are proud to announce the addition of the 15th member of BHL: The Library of Congress! We are so excited to provide their free, openly accessible literature at BHL! Also, Cornell University, a BHL partner since last year has expanded it's role by becoming a Steering Committee member! Learn more about both BHL partners at the BHL blog: http://blog.biodiversitylibrary.org/2013/02/new-bhl-steering-committee-members.html

The most popular posting time was: 10am

Of the ten most popular posts of the past six months, three involved campaigns and one involved a collaboration.

No topic trends, just type trends of quizzes more popular than biodiversity news posts in top ten posts.

Overall performance of Facebook (both platform performance and traffic back to BHL from

Facebook) dramatically increasing (with usual dip experienced each summer).

## Responsible Parties

**BHL Program Manager**
- Responsibilities:
    - Statistics
    - Archive Facebook posts on bi-annual basis

**BHL Technician**
- Responsibilities:
    - Coordinating content themes based on calendar (see strategies section);
    - Campaign-related posts, unless designated to interns
        - Archiving campaign-related posts
    - Biodiversity News; Blog Posts; Quizzes; Workflow
        - Posting quiz answers, including for intern posts
    - Praise to Testimonials wiki page
    - Replying to comments and messages posted to the BHL Facebook page as required.
    - Granting BHL staff administrative rights to the BHL Facebook page (except in case of interns)
    - Scheduling intern Facebook posts if interns not granted access to Facebook

**Collections Coordinator**
- Responsibilities:
    - Make interns creating Facebook posts temporary BHL Facebook page administrators
    - Review intern Facebook posts
    - Revoke intern Facebook admin access after internship

## Details

Whenever possible/appropriate, Facebook posts should link to other Facebook pages (by using the formatting @[insert Facebook page name], especially other BHL partner institutions). This ensures that our post will repost on the referenced Facebook page, increasing the audience for the post. It is not necessary to contact these entities to let them know they will be included in posts unless it is campaign related (see strategies section) or something strongly related to them (like blog post featuring a staffer at their institution or entire BHL collection created from books from this institution). In the latter cases, it may be worthwhile to contact the institution and request that they share the BHL

post.

These linkages should be utilized particularly for campaigns or collaborations (see strategies section), when biodiversity stories reference known organizations/entities with Facebook pages, or when post publisher knows of an appropriate Facebook page to reference. Searching keywords in Facebook can help to identify Facebook page candidates for linking. If the mention is related to a campaign, or something especially meaningful for that organization, it may be worthwhile to contact the institution to request further publicity on the post.

Praise statements on Facebook, either through comments or messages, should be added to the BHL Testimonials wiki page: https://bhl.wikispaces.com/Testimonials (BHL Technician)

The BHL Facebook page is a page within the Facebook context. This means that there is no login for the page itself. Instead, individuals are given administrative access to the page through their own Facebook accounts. Administrators will login to Facebook as themselves and then choose to use Facebook as BHL in order to update the BHL page. The BHL Technician is responsible for granting people administrative access to the Facebook page, except in the case of interns (Collections Coordinator responsibility).

[Types of Posts](#)

**Post Guidelines**

- All Facebook posts should be structured around an image, as image posts perform much better within Facebook than non-image posts. Facebook image size dimensions for regular posts are 403 x 403 pixels. DPI for images used on Facebook should be 120. All posts should also include the link to that image in BHL (not Flickr).
- When appropriate, reuse content on both Facebook and Twitter. While it is important to maintain a balance of unique content being posted to different platforms, the reality of the time required to locate topics and content mandates some reuse for efficiency.
- We have found that, while the "types" of people following us on Twitter and Facebook may be the same, the actual people generally choose one platform or the other. Thus, duplicate content is likely to reach unique audiences if posted to both Facebook and Twitter.
- The BHL Technician is responsible for replying to any messages, questions, or comments sent to the BHL Facebook account, either through direct message,

comments to posts, or comments on pages.

- **Quizzes:** Feature images from BHL collection and a question related to the species/image/illustration/author/publication represented.
  - Species Factoids (Targets Scientists/Researchers; Citizen Scientists/People interested in Biodiversity; Artists/Art Historians (for the images associated with posts))
  - Author Factoids (Targets Librarians; Bibliophiles; Artists/Art Historians; potentially Citizen Scientists/People interested in Biodiversity, depending on the author)
  - Publication Factoids (Targets Librarians, Bibliophiles, and potentially Scientists/Researchers depending on the publication)
  - Answers to quizzes can be documented on this wiki page for copying and pasting answers to Facebook: https://bhl.wikispaces.com/social+media+brainstorm
    - All quizzes include links to the image used for the post in BHL.
    - The BHL Technician is responsible for posting answers to the Facebook quizzes
- **Biodiversity News:** Features a news story about biodiversity and a related image from BHL. (Targets Scientists/Researchers; Citizen Scientists/People interested in Biodiversity; Artists/Art Historians)
  - Include link in BHL for image used in post.
- **Workflow:** Periodic posts of pictures of various workflow elements, with brief descriptions of the process. Whenever the BHL Program Manager receives these for Twitter, she should share them with the BHL Technician for use on Facebook. Include the handle for the Facebook page of the institution that contributed the picture in the Facebook post.
- **Blog Posts:** A short Facebook post referencing a BHL blog post. In general, all BHL Blog posts are reposted as a Facebook post that links back to the blog post. This is usually limited to twice a week at most. An image related to the blog post should accompany the Facebook post. Blog posts about quarterly reports, newsletters, BHL Users, and book of the week posts should always be featured on Facebook. (Targets all Facebook audiences)

Schedule

Generally, two Facebook posts should publish daily. One around 10am, another around 3pm.

**Daily**

- *Quizzes:* (These will be either species, author, or publication-centered, based on BHL calendar events (see strategy section below). If there are no special events, species will be the default). 10am
- *Biodiversity News:* Every 3pm post, except those on which a blog post publishes, will
be a biodiversity news post. 3pm

**As Appropriate**
- *Workflow:* As available, in lieu of the quiz, we will post a workflow image and some
information about that image. If these prove extremely popular, we can move to posting
these regularly, as content allows. 10am
- *Blog Posts:* On days on which a blog post publishes, the 3pm post will feature that post.
These constitute project news update posts and book of the week posts, among other
things. 3pm

**Note: During campaign weeks, all Facebook content will relate to campaigns, and the above schedule will not apply. On campaigns weeks:**

- Daily ONE Facebook post, 10am
- On Blog Post publication day, Facebook post will highlight blog post
- One day during week will be a post highlighting the BHL, iTunes U, and Flickr collections
- Three other posts that week will highlight factoids about campaign, linking to BHL content

Choosing Content

Choice of content should be driven by the BHL calendar or campaigns. More information in Strategies section. When a campaign is occurring, the Facebook posts should feature content related to that campaign and link to the campaign Flickr collection and iTunes U collection, as appropriate.

When no specific events are listed on the calendar, topics may be chosen at random. Browsing through the Flickr collection to find interesting images is a good way to identify fodder for a post.

<u>Intern Posts</u>

Interns are responsible for composing Facebook posts related to any blog posts they write (1 Facebook post per blog post), and may be delegated the task of writing Facebook posts for campaigns. The Collections Coordinator will make any interns creating Facebook posts temporary administrators on the BHL Facebook page, from which they can schedule Facebook posts according to their duties. The Collections Coordinator will review the posts before they publish to ensure appropriateness. If the posts relate to campaigns, the Collections Coordinator will alert the BHL Technician that they are available. Once the intern leaves, the Collections Coordinator will revoke intern BHL Facebook page administrator access.

The intern should link Facebook posts that reference blog posts to the actual blog post, not the general BHL blog. If the post is constructed before the actual post publishes, the intern can find the URL for the upcoming post by clicking on the permalink button in the right-hand side of the blog post compose screen. This is the link that should be used in the post.

Answers to any quizzes should be documented on this wiki page: https://bhl.wikispaces.com/social+media+brainstorm. The BHL Technician is responsible for posting the quiz answers.

If interns are not given access to the Facebook page, they should send their Facebook content to the BHL Technician to schedule.

<u>Facebook Archive</u>

BHL archives its Facebook posts by downloading the post data through Facebook Insights every 6 months. When the BHL Program Manager performs the bi-annual outreach evaluation, she will download the "post level data" within Facebook insights for the past six months and store it as an excel file within the S:ISD\BHL\BHL Directorate\Outreach and Communication\Social Media Archives\Facebook Archive folder.

## Goals

Below are the goals this platform supports. See Evaluation section for more information on specific metric goals.

**Outreach Goal One: Increase awareness about BHL and grow our audience.**

- Followers on Facebook: Measures not only how Facebook is increasing awareness about BHL (by tracking the number of people learning more about BHL through this platform), but also how our BHL audience is growing based on the number of people seeing our content through Facebook.
- Reach of Facebook Posts: Measures how many people are seeing our BHL Facebook content, thus being made potentially aware of BHL.
- Engagement: See goal three. Engagement includes number of people clicking on links in posts. These clicks usually lead back to BHL or BHL platforms, like the blog (except when they lead external news sites), so bringing people back to BHL through Facebook reflects audience and BHL awareness building.

**Outreach Goal Two: Keep people informed about project developments, services, and how to use them.**
- The main "metric" for this section would be to capture whether we are actually sending out news updates via Facbeook. The plan stipulates that we should, and simply gathering the number of posts about project updates will not give us meaningful information, so we will not track that. However...
- Popular Posts: What is meaningful is whether the project news and updates posts are being interacted with by users. Thus, as part of the bi-annual evaluation (see Evaluation section for more information), the BHL Program Manager will evaluate the performance of individual posts to determine most successful content types. Special attention should be paid to whether news and update posts are popular. If they are not, these posts should still be sent out, but perhaps different approaches to the posts should be considered.

**Outreach Goal Three: Raise awareness and foster dialogue within BHL audiences about biodiversity topics and corpus publications using BHL collections.**
- People Interacting with Page: Tracks the number of people interacting with our Facebook posts. These interactions include comments, sharing, or liking posts. Comments and liking posts reflect forms of dialogue about topics. Sharing posts reflects increasing awareness about those topics through BHL, as sharing means all friends of the person who shared will also see the post.
- Interactions: The number of comments, shares, and likes, reflecting dialogue and raised awareness as articulated above.
- Engagement: This reflects the number of people commenting, sharing, liking, or clicking on links in Facebook posts. Commenting, sharing and liking support dialogue and awareness as already articulated. Clicking on links reflect raising awareness (and building audience - see goal one) about the topic via BHL content, as people will gain more information about a topic by viewing our BHL content.
- Popular Posts: On a bi-annual basis (see Evaluation section for more information), the BHL Program Manager will evaluate the performance of individual posts to determine most successful content types. Future posting will be adjusted based on these findings.

**Outreach Goal Four: Increase traffic back to BHL from Social Media**
- Visitors to BHL from Facebook: Measures how well Facebook is helping us build our core BHL audience.

Metrics related to Facebook are recorded on a monthly basis in the Monthly Reporting Document. These metrics as measured for progress towards goals, and an evaluation of most popular posts, are then recorded in the bi-annual Outreach Evaluation documents.

# BLOG

## Audiences

Scientists/Researchers; Citizen Scientists/People interested in biodiversity; Bibliophiles; Artists/Art Historians; Techies; Taxonomists; Librarians

50% of our blog audience is in the U.S. The other percentages are fairly evenly distributed, with next top countries being Great Britain, India, Canada, Germany, and Australia.

## Current Evaluation

Over the past year, popular blog posts were divided between:
- 60% book of the week
- 40% news update posts.

None of the most popular posts were BHL User posts. However, these posts are used to inform project development and for reporting purposes, so useful to staff but perhaps not as interesting for readers.

Most popular post of past six months was announcement of new BHL website.

2 of the most popular posts involved collaborations, and 2 were part of a campaign.

The blog is the most effective social media outlet for sharing project updates, as evidenced by post popularity compared to other outlets.

Blog visits and visitors have been steadily increasing each month, with significant increases in Winter/Spring 2013 (as is always seen on our platforms, performance is decreasing slightly for summer months, as compared to non-summer months). Therefore, the blog's performance as a platform is positively improving.

However, the blog is still not driving traffic back to BHL as desired. It and Twitter are the two least successful social media platforms at doing so. Thus, it is recommended that blog posts include some "leading" phrases encouraging users to visit BHL to satisfy their curiosity about the comment (i.e. in post featuring book about reptiles and amphibians,

include within the body of the post: "Ever wondered what the inside of a frog looks like? Click here to find out!"). Not all images that are enticing should be included in the blog post itself. Some should be left as links to thus encourage more people to actually visit BHL, not just read the post.

## Responsible Parties

### BHL Program Manager
- Responsibilities:
  - Coordinating content themes based on calendar (see strategies section);
  - Coordinating guest blogging and BHL user posts
    - Ensuring posts documented on BHL Editorial calendar and include standard boilerplate requests for new submissions
    - Alerting BHL Technician to need to upload images to Flickr for appropriate guest blog posts and include link to set in post
    - Tweets for guest blog posts and BHL User posts
  - BHL Update Posts
    - Ensuring posts documented on BHL Editorial calendar
  - Book of the Week Posts
    - Ensuring these books added to BHL Book of the Week collection
    - Ensuring posts documented on BHL Editorial calendar
    - Adding boilerplate calls for guest submissions to end of all Book of the Week posts
    - Contacting BHL Technician to upload Book of the Week book images to Flickr
  - Rewriting BHL Users Posts
    - Ensuring posts documented on BHL Editorial calendar
    - Sending narratives to interviewees for review
  - Statistics
  - Praise to Testimonials wiki page
  - Moderating comments and replying to comments as required
  - Granting or revoking blogger administrative or author access, except in case of interns

### BHL Technician
- Responsibilities:
  - Campaign blog posts, unless delegated to interns (see Campaigns section)
    - Ensuring these books added to BHL Book of the Week collection
    - Ensuring posts documented on BHL Editorial calendar
    - Adding BHL, iTunes U and Flickr collection links to intern campaign blog posts

- - - Identifying guest campaign blog post candidates, as applicable
  - ○ Uploading Book of the Week images to Flickr and adding to Book of the Week collection (including for campaigns, unless delegated to interns)
    - ■ Including for guest blog posts, if applicable

**Collections Coordinator**
- ● Responsibilities:
  - ○ Permissions Posts
    - ■ Ensuring posts documented on BHL Editorial calendar
  - ○ Reviewing intern blog posts and scheduling for publication
  - ○ Granting and revoking author permission status in blogger for interns during period of internship
  - ○ Ensure book of the week books written by interns are added to the BHL Book of the Week website collection and uploaded to Flickr (intern responsibility to do this, but Collections Coordinator responsible for making sure it happens)
  - ○ Ensure intern Book of the Week posts are added to the BHL Editorial calendar (intern responsibility to do this, but Collections Coordinator responsible for making sure it happens)
  - ○ Ensure interns write Tweets and Facebook posts for intern blog posts (intern responsibility to write, but Collections Coordinator responsible for making sure it happens)

## Details

All references to BHL content (i.e. links to BHL) in a blog post should be bolded to enunciate the links. Book of the Week/Content-centered posts should have the title of the book referenced within the first two paragraphs or at the very top of the post if it will not fit within the first paragraph blog content.

Where appropriate, blog posts should also include links to Flickr sets. Contact the BHL Technician to add book images as a set to Flickr if they do not already exist (including sets related to campaigns, unless delegated to interns). These Book of the Week sets in Flickr should be added to this collection (both existing sets used as book of the week or new sets uploaded for book of the week posts): http://www.flickr.com/photos/biodivlibrary/collections/72157627117094249/. Contact the BHL Technician to add Book of the Week Flickr sets to this collection. Interns should upload their book of the week books to Flickr (unless staff do not want to share the Flickr login information, in which case the intern should contact the BHL Technician to upload the book for them) and add to the Book of the Week collection.

All book of the week posts should include the tag "book of the week." All BHL and Our

Users posts should include the tag "bhl users." All Book of the Week books should be added to the BHL Book of the Week Collection (Item Level): http://www.biodiversitylibrary.org/browse/collection/40. Interns should add their book of the week books to this collection.

All comments are moderated on the blog. The BHL Program Manager is responsible for reviewing added comments and publishing appropriate ones. The BHL Program Manager will receive an email when new comments are added, to which she can review them on this page for publication:
https://www.blogger.com/blogger.g?blogID=4622149946604925423#pendingcomments

We generally do not publish comments that link to external sites unless it seems to be a legitimate comment. These comments should be marked as spam, as well as any clearly nonsensical comments. Porn site comments are also marked as spam. Generally, all comments will either be published or marked as spam. Rarely, if ever, should the comment be completely deleted.

The BHL Program Manager is also responsible for replying, via post comments, to user comments as appropriate.

Praise statements in blog comments should be added to the BHL Testimonials wiki page: https://bhl.wikispaces.com/Testimonials (Program Manager)

Blog posts should include "leading" sentences (i.e. such as questions or "satisfy your curiosity" statements) with links back to BHL as a means of encouraging more people to visit BHL from the blog post. Not all of the most interesting illustrations or tidbits should be included in the post - some should be left as links to encourage more visits to BHL.

All blog posts should also be publicized via Twitter and Facebook. See sections above for more information.

All Book of the Week posts should include the following boilerplate text at the end of the post:
*We hope you enjoyed this post. Interested in guest-blogging for BHL? We'd love that! Natural history, biodiversity and conservation topics are especially welcomed. Email us your ideas at* feedback@biodiversitylibrary.org.

Types of Posts

- **Project News:** (targets all blog audiences)

- Posts about important project updates, milestones, and events. Includes posts about quarterly reports and newsletters.
- **BHL Users:** (targets Scientists/Researchers; Techies; Taxonomists; potentially other blog audiences depending on specialty of interviewee)
  - Posts interviewing different BHL users about their work and use of BHL.
  - Typically publish third Tuesday of every month
- **Book of the Week:** (targets Citizen Scientists/People interested in Biodiversity; Artists/Art Historians; Bibliophiles; Librarians)
  - Weekly posts highlighting a book in BHL. Once a month this post will be a very in-depth discussion of a topic. Other weeks they will be shorter posts briefly highlighting books, authors, illustrations, topics, etc. Should include links to Flickr sets.
  - Include "leading" sentences (such as questions or "satisfy your curiosity" statements) with links to BHL to encourage more users to visit BHL from blog posts (see Current Evaluation section for more information).
  - Typically publish every Thursday
  - During campaign weeks, these will relate to the campaign theme.
- **New Permissions:** (Targets Scientists/Researchers; Librarians; potentially taxonomists)
  - Brief posts announcing new permissions gained for BHL.

## Schedule

Blog posts typically publish at 10am on the day identified for the post.

Each blog post should be documented on the BHL calendar, including guest and intern blog post submissions (see strategy section for more information). The Collections Coordinator is responsible for ensuring that intern blog posts are documented on the BHL calendar, though interns should send the appointment for their blog posts themselves.

Standing BHL User and Book of the Week appointments exist on the BHL Editorial calendar. These appointments should be updated in the details section to reflect the topic or interviewee of each post. If the standard posting day for that week changes, that week's standing appointment should be moved to reflect the actual posting day.

Blogger is used for the BHL Blog. Individuals are given administrative or authorship access to blogger based on their own gmail accounts. They will login to their own gmail accounts, go to blogger.com, and select the BHL blog to write posts or edit content for the blog. The Program Manager is responsible for granting administrative access to blogger, except in the case of interns, where it is the Collections Coordinator's responsibility to do so.

If you need to schedule a post in blogger for publication in the future, set the date and time in the "Schedule" section on the right-hand side of the blog composing screen and then hit "publish" at the top of the screen, next to the blog title. This will actually schedule the post to publish on the date and time you indicated.

There should be a minimum of one blog post per week - a book of the week post. Where appropriate, these posts coordinate with BHL campaigns.

**Weekly:**
- Book of the Week (Publish every Thursday) 10am
  - During campaign weeks, these relate to campaign theme.
  - May publish on day other than Thursday if topic tied to particular date (i.e. biodiversity holiday, author birthday, etc.)

**Monthly:**
- BHL Users (Publish third Tuesday of month, typically) 10am

**As Appropriate:**
- Project Updates; 10am
- Permissions Posts; 10am

Choosing Content

Choice of content should be driven by the BHL calendar or campaigns. More information in Strategies section. Where no campaigns or special events exist, browsing through Flickr is a good place to find books to feature on the blog.

Anytime a significant project event occurs, a blog post should be published about it. It is the Program Manager's responsibility to write these.

Where appropriate, guest blog submissions will be geared towards specific campaigns or topics.

Collaboration and Campaign Posts

All blog posts involving collaborations should have the keyword "collaboration" added to it as a tag. All Campaign blog posts should have the keyword "campaign" and the custom keyword created for that campaign added as a keyword to the blog post.

## Goals

Below are the goals this platform supports. See Evaluation section for more information on specific metric goals.

**Outreach Goal One: Increase awareness about BHL and grow our audience.**
- Traffic to BHL Blog: Measures how well the blog increases awareness about BHL by delivering information to audiences about our project and content.
- Visitors to Blog: Measures not only how the blog is increasing awareness about BHL (by tracking the number of people learning more about BHL through this platform), but also how our BHL audience is growing based on the number of people seeing our content through the blog.
- Blog Pageviews: Measures not just the visits and visitors, but how many pages these visitors are looking at on our blog.

**Outreach Goal Two: Keep people informed about project developments, services, and how to use them.**
- The main "metric" for this section would be to capture whether we are actually sending out news updates via the blog. The plan stipulates that we should, and simply gathering the number of posts about project updates will not give us meaningful information, so we will not track that. However...
- Popular Posts: What is meaningful is whether the project news and updates posts are being interacted with by users. Thus, as part of the bi-annual evaluation (see Evaluation section for more information), the BHL Program Manager will evaluate the performance of individual posts to determine most successful content types. Special attention should be paid to whether news and update posts are popular. If they are not, these posts should still be sent out, but perhaps different approaches to the posts or publicizing them should be considered.

**Outreach Goal Three: Raise awareness and foster dialogue within BHL audiences about biodiversity topics and corpus publications using BHL collections.**
- Guest Blogging: A good measure of how well the blog is fostering dialogue about biodiversity or library topics and their relation to BHL. More guest blogs means more people are conversing about these topics using this platform.
- Blog Comments: While we typically get few comments to our blog, tracking comments posted reflects fostering dialogue.
- Popular Posts: On a bi-annual basis (see Evaluation section for more information), the BHL Program Manager will evaluate the performance of individual posts to determine most successful content types. Future posting will be adjusted based on these findings.

**Outreach Goal Four: Increase traffic back to BHL from Social Media**
- Visitors to BHL from Blog: Measures how well the blog is helping us build our core

BHL audience.

Metrics related to the blog are recorded on a monthly basis in the Monthly Reporting Document. These metrics as measured for progress towards goals, and an evaluation of most popular posts, are then recorded in the bi-annual Outreach Evaluation documents.

## BHL Users Blog Posts

BHL User posts are interviews with BHL users that ask about their work and how they use BHL to support that work. In the past, these posts have been published via question and answer style. However, it is more engaging to write them as narrative posts. Thus, the BHL Program Manager will transform questionnaires received into narratives, **sending narrative to interviewee for review before posting**.

BHL User correspondence should go through the [feedback@biodiversitylibrary.org](mailto:feedback@biodiversitylibrary.org) account or the feedback form (twitter).

All BHL User posts should include the following text at the end of the post:
*We hope you enjoyed this post. Interested in being interviewed for BHL? We'd love that! Email us at* feedback@biodiversitylibrary.org.

**Submission Template for BHL User Posts:**
- A template for BHL User post submissions is provided in Appendix B. This template should be sent to all potential BHL User candidates. The Program Manager will arrange a publication date for the blog post with the user, and will document that appointment on the BHL Editorial calendar.

**Strategies for Soliciting BHL Users Submissions:**
- Monthly call for submission via Twitter
- Periodic emails to staff requesting leads for interview
- Boilerplate text at end of each BHL User post
- Review of Gemini to identify potential interview candidates
- BHL Program Manager follows up any leads sent via email or through other means
- Other?

## Guest Blogging

Guest blogging in this context refers to any blog posts not written by BHL Secretariat members. These can include staff at BHL member libraries as well as non-BHL staff. These exclude BHL User posts, as they require additional work outside the parameters of

these posts.

Generally, guest bloggers will send the BHL Program Manager post text and images, according to the guidelines stipulated in the template (unless posts for campaigns, which will be sent to the BHL Technician). The Program Manager will then draft the post into blogger for publication.

Guest blog posts should still have images uploaded to Flickr and set link included in post, if appropriate. BHL Program Manager responsible for alerting BHL Technician about need to upload images to Flickr. BHL Program Manager to include link to Flickr set in guest blog post.

The Program Manager is responsible for composing tweets about the guest blog posts, per guidelines above. The BHL Technician will post the blog post to Facebook, per guidelines above.

Guest blog correspondence should go through the [feedback@biodiversitylibrary.org](mailto:feedback@biodiversitylibrary.org) account or the feedback form (twitter).

The exception is intern posts, for which the intern can be granted author permissions on the BHL blog by the Collections Coordinator through their gmail account during the course of their internship. The intern will then draft and save the blog post within Blogger themselves. The posts will only be saved as draft, however, and the BHL Collections Coordinator will review all posts before scheduling for publication. The intern's author permission stats should be revoked by the BHL Collections Coordinator at the completion of the internship. The intern should also make sure that the book of the week book is added to the BHL Book of the Week collection, that the images are uploaded to Flickr and added to the Book of the Week Flickr collection, and that the post is documented on the BHL Calendar. Finally, the intern is responsible for composing tweets and Facebook posts related to their blog posts (see Facebook and Twitter sections for more information).

When choosing topics for guest blogging, including intern posts, the BHL calendar should be consulted for topic ideas, but also to ensure that posts are not being planned for campaign weeks  unless the post is specifically for the campaign. Typically (with the exception of BHL and Our User posts), guest and intern blog posts should not publish during campaign weeks unless they are the campaign blog posts. Interns must also ensure that they are not planning posts for days that already have posts scheduled. Consult the BHL Calendar to see what blog posts are scheduled.

All guest blog posts should include the following text at the end of the post:
*We hope you enjoyed this post. Interested in guest-blogging for BHL? We'd love*

*that! Natural history, biodiversity and conservation topics are especially welcomed. Email us your ideas at feedback@biodiversitylibrary.org.*

Again, all guest blog posts should be recorded on the BHL calendar.

**Template for Guest Submissions.**  A template is provided in Appendix A of this document, to be sent to all guest blogging candidates (and made available to all BHL staff). The Program Manager will arrange a publication date for the blog post with the user, and will document that appointment on the BHL Editorial calendar.

**Strategy for soliciting guest blogging applications.**
- Currently, BHL members that participate in pan-BHL scanning activities are requested to submit one blog post each year.
- Boilerplate text is added to the bottom of each blog post (non-project news posts) soliciting guest blogging
- BHL Program Manager (and BHL Technician re: campaigns) actively identifies appropriate candidates for guest blogging, particularly as they pertain to campaigns, and requests post submissions.
- BHL will send out monthly (more frequently as appropriate) calls for guest blog posts.
- Other?

## Audiences

Scientists/Researchers (largely geared towards tagging); Citizen Scientists/People interested in biodiversity; Artists/Art Historians; Bibliophiles.

## Responsible Parties

**Collections Coordinator**
- Responsibilities:
  - Statistics
  - Ensuring, where necessary, interns have access to Flickr account and instructions for creating collections and uploading images
    - Changing password to biodiversitylibrary@gmail.com account, if information provided to intern, when intern leaves, or whenever password change required
  - Alerting BHL Technician when BHL and iTunes U campaign collections are available for use in creating Flickr campaign collections

**BHL Technician**
- Responsibilities:
  - Adding images (goal 5,000 images annually) and creating sets and collections, as appropriate.
  - Creating collections and uploading books specifically for BHL campaigns (unless delegated to interns)
  - Uploading Book of the Week books to Flickr and adding to Book of the Week Flickr collection (unless delegated to interns)
    - Includes for guest blog posts
  - Responding to messages/comments received via Flickr
  - Providing biodiversitylibrary@gmail.com login credentials to login to BHL Flickr, as necessary

**Program Manager**
- Responsibilities:
  - Contact BHL Technician to upload Book of the Week books to Flickr, including guest blog posts

**BHL Staff**
- Responsibilities:

      ○    Uploading images and creating sets/collections as appropriate

## Details

New sets are typically added to the BHL Flickr daily by the BHL Technician.

Praise statements in Flickr, through comments or messages, should be added to the BHL Testimonials wiki page: https://bhl.wikispaces.com/Testimonials (BHL Technician)

The BHL Technician is also responsible for replying to any comments or messages posted to the BHL Flickr, as required.


### Flickr Content Guidelines

BHL Flickr content is limited to images from BHL books. It does not contain photos from BHL events. These will be added to individual BHL staff Flickr accounts.

BHL content is organized by sets and collections. BHL staff do not add individual images to Flickr (though some individual images were added to Flickr based on Tweets in the past). Instead, all images from a particular book are added to Flickr as a set. This process occurs via the BHL dashboard. Bibliographic information and links to the images in BHL are automatically passed at the time of upload. See Guide for more information.

Sets are comprised of individual images. Thus, one set includes the individual images from a book. Sets may also pull together images from separate books based on particular themes. Thus, one image may be in multiple sets.

Sets can be further organized into Collections. Collections are comprised of sets. One set may occur within multiple collections.


### Uploading and Organizing Content

Any BHL staff person may upload images to Flickr. A tutorial has been created to guide staff through the upload process. Uploaded sets should also be placed within appropriate contributor and subject collections. See Guide for more information.

The Flickr account is managed through the biodiversitylibrar@gmail.com gmail account. Login to the BHL Flickr site using the biodiversitylibrary@gmail.com credentials. Contact the BHL Technician to obtain these login credentials.

Any Staff person may create sets and collections as desired, on an ad hoc basis or for particular events or campaigns. The only stipulation is that they must adhere to guidelines for sets and collections outlined above.

Images from Book of the Week blog post books should be added to the Book of the Week Flickr collection (BHL Technician, unless designated to intern). During campaign weeks, the Book of the Week book will be the campaign blog post (typically), and images from that book should be uploaded to both the Book of the Week collection and the campaign collection (see below).

Interns should upload images from books related to blog posts they write and add to the correct Flickr collection (unless staff do not want to provide the Flickr login information. In that case the intern will contact the BHL Technician to upload the book for them). The BHL Technician is otherwise responsible for uploading Book of the Week images to Flickr (including for guest blog posts) and adding them to the Book of the Week Flickr collection, again unless this task is designated to an intern.

If an intern is provided with the password to the biodiversitylibrary@gmail.com account for Flickr upload, the password should be changed once the intern leaves. The Collections Coordinator is responsible for changing the password when interns leave and informing affected parties of the change. The Collections Coordinator is the designated keeper of the biodiversitylibrary@gmail.com account password and is responsible for changing the password whenever it becomes necessary.

**Flickr Collections for Campaigns**

The BHL Technician is specifically responsible for uploading images and creating collections required for campaigns, unless these tasks are designated to an intern. Typically, each campaign should have a Flickr collection, unless the books for the campaign topic are simply not appropriate for Flickr (i.e. theme based on books with no images).

These collections should include images from books included in the BHL and/or iTunes U campaign collections, should these collections exist. Not all BHL campaigns will have BHL and/or iTunes U Collections, but those that do should have appropriate images from those books in the Flickr collection. The Collections Coordinator should alert the BHL Technician (or intern, as appropriate) when these collections are available for use in creating the Flickr collection. The Flickr collection can also include images from books not in the BHL or iTunes U collections.

Campaign Flickr collections should also contain the images from the book used in the blog post for the campaign. This set will also typically be added to the Book of the Week collection.

If book information for campaign collections is available before an intern begins, they may be delegated the task of uploading campaign related books and creating the campaign collection (again, if password information provided, Collections Coordinator must change password after the intern leaves). They may also be delegated the task of creating Flickr collections from book images should no BHL collection be planned. If a BHL Collection is planned, but not available at the time of the internship, the intern may begin the campaign Flickr collection with images they used for their own work (like Book of the Week images), and the BHL Technician may add images from the books in the BHL website or iTunes U collection once they are available.


## Choosing Content for Flickr

Staff may upload any book images they want to Flickr. Generally, images uploaded should be plates that comprise an entire page, not smaller in-text figures.

For campaigns and specific events, sets or collections should be created. The need for these will be identified during campaign organizational meetings (see Strategies section for more information) and should include images from the BHL and/or iTunes U collection books, if available, and the campaign blog post book (see above for more information). Sets for special events may be created on ad hoc basis by BHL staff as needed, informed by the BHL Calendar.


## Sharing Flickr Content

Nearly all BHL social media is driven by Flickr. Since images perform best on most social media platforms, social media content creators will typically browse or search Flickr to find BHL content related to desired topics. However, links to those images should point back to BHL, not Flickr.

Monthly service tweets will also publicize the BHL Flickr. Blog posts also include links to relevant Flickr sets.

By improving tags on Flickr images, we are also more able to share these images with external websites like the Encyclopedia of Life. See Enhancing Flickr Content section for more information.

## Licensing

Flickr images uploaded from BHL member institutions are shared via a Creative Commons: Attribution, Share Alike license.

Flickr images uploaded from non-BHL member institutions or from permissions agreements are shared via a Creative Commons: Attribution, Non-Commercial, Share Alike license.

## Enhancing Flickr Content

While bibliographic information and links to BHL are automatically associated with images at the time of upload to Flickr, image metadata can be further enhanced by tagging images with species, or even common, names.

When these tags are added to images, users (and staff) can not only search for images of specific species, but BHL can easily share these images with external websites, like the Encyclopedia of Life.

Tags can be added as either regular tags or machine tags. Machine tags are specially formatted to be read by computers. BHL and EOL have developed a process by which images with species name machine tags can be automatically harvested from the BHL Flickr, uploaded to a BHL Image collection in EOL, and associated with corresponding species pages. Making our content available in EOL exposes BHL resources to a new audience and furthers awareness about BHL - two primary outreach goals.

Images with machine tags might in the future be easily shared with other projects, like Wikipedia.

Due to staff limitations and image volume, BHL is crowdsourcing image tagging.

Brief tutorials have been created to guide users through adding machine tags. Periodic tweets and blog posts about this process remind users of our need for machine tagging.

## Flickr Tagging Parties

**Responsible Parties**

**Program Manager**
- Responsibilities:
    - Organize parties with appropriate collaborators
    - Give introduction to BHL and BHL Flickr at tagging parties
    - Create flyer for event
    - Coordinating refreshments for party
    - Advertise parties via appropriate outlets
        - SI Yammer and SI listservs for private events
        - Twitter, Blog, and Public Wiki Events page for public events
    - Write and publish blog post summarizing event
    - Eventually prepare how-to packet for organizing and hosting Flickr Tagging Parties

**BHL Technician**
- Responsibilities:
    - Hang flyers in physical locations
    - Create spreadsheet of Flickr tagging candidates
    - Coordinating extra equipment for party (i.e. laptops) and setting this equipment up on day of party
    - Advertising public parties via Facebook, linking to blog post

**Collections Coordinator**
- Responsibilities:
    - Image numbers in EOL BHL Image pool before and after tagging parties
    - Serve as contact and lead in future development of improved tagging instructional videos

Beginning in 2012, SIL BHL staff began hosting Flickr Tagging Parties for SI staff, in collaboration with Encyclopedia of Life staff, and the Smithsonian. These parties offered a chance for attendees to gather in person to add species name machine tags to images in the BHL Flickr, after which they could be automatically ingested onto corresponding EOL species pages.

BHL tagged images are automatically ingested into this Image Collection in EOL: http://eol.org/collections/53002/images?sort_by=1&view_as=2

**Goals of the Parties:**
- Crowdsource identification of species depicted in BHL images
- Add machine tags for these species names to BHL images, allowing these images to be efficiently shared with external parties, like EOL, and more easily discovered in BHL Flickr

**Elements of the Parties:**
- Introduction to BHL, EOL, and any other party collaborators
  - BHL Intro provided by Program Manager
- Introduction to BHL Flickr
  - Provided by Program Manager
- Instructions on Tagging: http://www.flickr.com/groups/encyclopedia_of_life/discuss/72157629515768640/
- Spreadsheet highlighting candidates for tagging (BHL Technician Responsibility)
- Extra Equipment
  - Coordinated by BHL Technician
- Refreshments
  - Coordinated by Program Manager

**Advertising the Party:**
- The following flyer should be updated, or similar updated flyer created, to advertise the parties: http://pinterest.com/pin/42925002668927185/
- The parties should be advertised via email listservs, with digital versions of the flyers attached to the emails.
- Physical copies of the flyers should be hung around the building hosting the party.
- If the party is a public event, it should be advertised via Facebook (BHL Technician), Twitter (Program Manager), and the blog (Program Manager). It should also be added to the BHL Events Page (http://biodivlib.wikispaces.com/Events, Program Manager)

**Reviewing Party Success:**
- Prior to the tagging party, the Collections Coordinator should record the number of images currently in the EOL Image pool
- Following the event, the Collections Coordinator should record the number of images in the EOL Image Pool. The difference is the number of new images tagged at the party (approximately).
- The Program Manager should write a blog post for the BHL blog summarizing the event, with image tagged statistics included

To date, events have only been private, open only to Smithsonian staff. In the future, BHL staff hope to host public events. However, this would require intensive labor, and should only be attempted if more resources are made available. The Smithsonian's soon-to-open public education center may be a good place to host this public event. Other BHL member institutions may also be interested in hosting events.

To encourage non-party user tagging, the Program Manager should send out periodic

tweets (service tweets - see Twitter section) encouraging people to add tags to BHL images, with links to the available instructional materials.

To support future events, the Program Manager should eventually create a packet detailing how to organize, host, and measure the success of Flickr Tagging Parties, made available to anyone interested in participating.

In the future, BHL also hopes to improve the tutorials provided for Flickr Tagging, to make it easier for remote users and after-party users, to tag BHL images. The Collections Coordinator has contacts that may be interested in developing improved tutorials, and should serve as the contact for future tutorial development.

## Goals

**Pool of Social Media Candidates**
A primary internal goal for Flickr is simply to provide an image pool of content for reuse in other social media platforms. As outlined, the search for content in BHL for social media usually begins with Flickr. This is more easily done by:
- Increasing images in Flickr: The more images, the more content for reuse.
- Images with Tags: The more tagged images, the easier it is to find illustrations of specific desired topics.

**Outreach Goal One: Increase awareness about BHL and grow our audience.**
- Views on Content: Tracking the number of views our content gets reflects how aware people are of our content and demonstrates the BHL Flickr audience.
- Contacts: These numbers indicate the people following us on Flickr, essentially, and thus reflect our BHL Flickr, and larger BHL, audience.
- Images with Tags: Tagging BHL Flickr images enables them to be shared and found more easily, thus making it more likely that people will find our content and be aware of BHL.
  - Images in EOL BHL Collection: A subset of this is how many of these tagged images are shared with EOL, further exposing BHL to new audiences.

**Outreach Goal Three: Raise awareness and foster dialogue within BHL audiences about biodiversity topics and corpus publications using BHL collections.**
- Images with Comments/Favorited/Notes: All of these metrics reflect interactions with our content, representing dialogues existing around our content.
- Images with Tags: Adding species name tags to Flickr images raises awareness about species depicted in these images by having them more easily identified and shared with external websites about those species. When they are placed in the context of an EOL species page, there is even more opportunity for users to

increase their awareness about a topic. Thus, the number of images shared with EOL is also a metric to support this goal.

**Outreach Goal Four: Increase traffic back to BHL from Social Media**

- Visitors to BHL from Flickr: Measures how well Flickr is helping us build our core BHL audience.

Metrics related to Flickr are recorded on a monthly basis in the Monthly Reporting Document. These metrics as measured for progress towards goals are then recorded in the bi-annual Outreach Evaluation documents.

## Audiences

Citizen Scientists/People interested in Biodiversity; Artists/Art Historians; Bibliophiles.

## Responsible Parties

**BHL Technician**
- Responsibilities:
    - Pinning at least four images per day to Pinterest from BHL website (two at 8am, two at 2pm)
        - Pins should relate to campaigns during campaign weeks
    - Enabling automatic tweets from pinned images to Twitter
    - Creating new boards in Pinterest as necessary
    - Pinning BHL outreach material, handouts, slide presentations, videos, etc. to Pinterest
        - BHL Staff should inform the Technician about content needing to be pinned to Pinterest
    - Serving as the contact for suspected copyright violation pins
    - Replying to any messages or comments received via Pinterest

**Program Manager**
- Responsibilities:
    - Forwarding alerts received via biodiversitylibrary@gmail.com related to Pinterest to the BHL Technician
    - Explore future tools for gathering engagement metrics on Pinterest (see goals section; may be designated to interns)
    - Statistics

## Details

The BHL Pinterest identity is BioDivLibrary, and the login information is connected to the biodiversitylibrary@gmail.com account. Contact the BHL Technician to receive login information, if required.

The BHL Pinterest is organized according to boards containing images supporting various

themes. New boards can be created whenever required or desired by the BHL Technician. The BHL Pinterest also contains both BHL and non-BHL images, but all images must be related to biodiversity or natural history in some way. When new images are pinned to Pinterest, they should be added to the appropriate board, or a new board should be created to support that image if needed. No images should be added to Pinterest that are not associated with a board.

Any new boards created should have a title and short description of the types of images found on that board.

Note: Careful attention must be taken to ensure that any non-BHL images pinned to the BHL Pinterest are NOT a violation of copyright. If copyright is unclear, do not repin the image. The BHL Technician will serve as the contact for any suspected copyright violation. Notices of images removed from pinterest due to suspected copyright violation are sent to biodiversitylibrary@gmail.com. The Program Manager should forward any of these notifications to the BHL Technician, as well as any additional correspondence received related to Pinterest.

**Schedule**

The Pinterest browser plug-in is used to add new images to the BHL Pinterest account. On a daily basis, the BHL Technician chooses at minimum 4 images from BHL to upload to pinterest. Two of these images should be pinned in the morning (i.e. 8am), and two in the afternoon (i.e. 2pm).  The automatic tweets should be enabled for these pins.

**Guidelines for Pinning**

Images for pins may be found via the BHL Flickr account, but the pins should always be generated from the BHL website. In general, it is best to pin portrait-style images to pinterest, as Pinterest images are displayed in portrait format. However, exceptions for exceptional images can be made.

When users click on the pinned image in Pinterest, they will be taken back to that page in BHL, thus allowing users to come full circle back to BHL from Pinterest.

When image are pinned, the "publish via Twitter" option should be clicked as well (an option within the pinning window), enabling an automatic tweet regarding that pin to publish via the @BioDivLibrary Twitter account.

When using the pinterest plugin to pin images, you are able to update the descriptive information attached to the image in Pinterest before pinning the image. The following

information should be included in the descriptive information:

Some bibliographic information about the source book is added to the image during the pinning process, but this information should be augmented to include:
- Taxonomic and/or common name, as presented on the image
- Title
- Volume
- Publication Place
- Publisher
- Publication Year

Following the bibliographic information, the following keywords should always be incorporated into the pin description: Biodiversitylibrary. Biodivlibrary. BHL. Biodiversity Heritage Library

If the pins are related to a campaign, the campaign keyword (chosen at time of campaign planning and documented as part of campaign planning document) should also be added to the pin.

The format of this information will thus look like:

Amone velue.
Recueil de planches de botanique de l'encyclopédie. v.1 plates
Paris :Chez Mme. Veuve Agasse, imprimeur-libraire,1823.
Biodiversitylibrary. Biodivlibrary. BHL. Biodiversity Heritage Library. [campaign keyword].

Posters, flyers, slide presentations, videos, and other promotional material for BHL is also documented on the BHL Pinterest. A specific board exists to aggregate this content: **BHL Past Events, Posters, Flyers, Videos, etc.** Any flyer or handout created for BHL should be pinned to this board. Presentations about BHL uploaded to slideshare should be pinned to this board. Videos from YouTube created for BHL should be pinned to this board. The BHL Technician is responsible for pinning these items to this board, but it is each staff member's responsibility to inform the Technician about content needing to be pinned.


Content Selection


If in need of inspiration for pinning images to Pinterest, browse the BHL Flickr site. Just remember all pins should be made from the BHL website, not Flickr itself. During campaign weeks, pinned images should relate to the campaign theme.

In general, portrait-style images should be selected, as pinterest displays images in portrait format. Exceptions can be made for select images.

## Goals

**Outreach Goal One: Increase awareness about BHL and grow our audience.**
- Pinned Images: The more images in Pinterest, the more likely people will find our content and interact with it. Thus, the number of images in Pinterest supports increasing BHL awareness.
- Followers: These numbers indicate the people following us on Pinterest, and thus reflect our BHL Pinterest, and larger BHL, audience.

**Outreach Goal Three: Raise awareness and foster dialogue within BHL audiences about biodiversity topics and corpus publications using BHL collections.**
- Repinned Images (FUTURE METRIC): People can share images in Pinterest by re-pinning them, reflecting engagement with those images. However, currently, there is no easy way to get this number without manually counting the repins. Thus, for now, we will not keep this metric. However, tools are being developed that should make it easier to get this number, and the BHL Program Manager or interns should explore these tools for possible implementation.
- Comments (FUTURE METRIC): People can add comments to images in Pinterest, which reflect engagement with those images and a conversation about them. However, currently, there is no easy way to get this number without manually counting the comments. Thus, for now, we will not keep this metric. However, tools are being developed that should make it easier to get this number, and the BHL Program Manager or interns should explore these tools for possible implementation.

**Outreach Goal Four: Increase traffic back to BHL from Social Media**
- Visitors to BHL from Pinterest: Measures how well Pinterest is helping us build our core BHL audience.

Metrics related to Pinterest are recorded on a monthly basis in the Monthly Reporting Document. These metrics as measured for progress towards goals are then recorded in the bi-annual Outreach Evaluation documents.

# CONFERENCES

## Audiences

Scientists/Researchers; Citizen Scientists/People interested in Biodiversity; Artists/Art Historians; Techies; Taxonomists; Librarians.

## Responsible Parties

**BHL Program Manager**
- Responsibilities
  - Organizing one pan-BHL conference presence per year (not necessarily staffing booth however), adding to Events wiki page,  and publicizing via Blog and Tweets
    - Including a post-conference blog post summarizing the event (post-conference blog post may be delegated to booth host if someone other than Program Manager)
    - Moving pan-Conference announcement on Events wiki page to past events section after conference passes
    - Incorporate hashtags and handles for conference into all publicity tweets
      - Tweets typically published at 12pm on day they post (see Twitter section)
  - Working with Collections Coordinator and possibly other BHL members to develop a universal BHL poster which can be repurposed for mutliple conferences
  - Adding list of typical conferences to BHL Calendar with submission deadline appointments
  - Adding BHL Staff Presentations to BHL Calendar
    - Publicizing staff presentations via tweets
      - Incorporate hashtags and handles for conferences and institutions to which staff belong into all tweets
      - Tweets typically publish at 12pm on day they post (see Twitter section)
  - Reminding BHL staff to populate BHL Presentations/Posters/Papers form and maintaining spreadsheet

**BHL Collections Coordinator**

- Working with Program Manager and possibly other BHL members to develop a universal BHL poster which can be repurposed for mutliple conferences

**BHL Staff**
- Responsibilities
  - All BHL Staff are responsible for publicizing BHL at conferences and recording their posters/papers/presentations on the BHL wiki

## Details

At the beginning of each year, the Program Manager should input into the BHL Conferences Calendar (https://www.google.com/calendar/ical/tlho13jp0qu6obs4taa9lhm7gg%40group.calendar.google.com/public/basic.ics) the conference dates and submission deadline dates for conferences BHL typically or might want to participate in.

The following represents a list of such conferences. This list is maintained on the Conferences and Grants wiki page, which also displays the BHL Conference calendar so that staff can see upcoming conferences, BHL staff presentations, and submission deadline dates: https://bhl.wikispaces.com/Conferences+and+Grants.

- ALA Midwinter
- ALA Annual
- ASIS&T
- Botany 201x
- CBHL
- Code4Lib
- Computers in Libraries
- DLF
- Ecological Society of America
- International Association of Aquatic and Marine Science Libraries and Information Centers (IAMSLIC)
- IFLA
- JCDL
- Internet Archive Leaders Forum
- LITA Forum
- Museum Computer Network (MCN)

- Museums and the Web (MW)
- SLA
- Society for the History of Natural History
- Society for the Preservation of Natural History Collections
- TDWG
- WebWise

BHL Staff and the Program Manager should add to this list throughout the year. Monthly emails to staff request that they add new conferences to the above wiki page. The Program Manager adds new conferences (and submission due dates) added to this wiki page to the BHL Conference calendar, as articulated above. The Program Manager should keep an eye on any conferences listed here without conference dates or submission deadlines given by the beginning of the year, when she adds the first batch to the BHL calendar. When the dates become available, they should be added to the calendar.

BHL Staff are required to document the Posters/Papers/Presentations/and Publications they do for BHL. These should be submitted via this form: https://docs.google.com/spreadsheet/viewform?formkey=dDFyYkVwYWZINDVYWWpNdEV6MU5TaGc6MQ#gid=0. This form is embedded within this wiki page, making it easy for staff to submit their presentations/posters/papers: https://bhl.wikispaces.com/Presentations+Posters%2C+Papers+Form. This page is linked to from this wiki page, which displays a list of the presentations by staff: https://bhl.wikispaces.com/BHL+Presentations.

Staff are reminded monthly by the Program Manager to submit poster/paper/presentations via this form.

The form feeds this spreadsheet, which documents all posters/papers/presentations given by BHL staff by year, as well as pan-BHL conferences: https://docs.google.com/spreadsheet/ccc?key=0Ak0hDkSQMhfDdDFyYkVwYWZINDVYWWpNdEV6MU5TaGc#gid=0. This spreadsheet is embedded within the public and private wiki for staff and the public to view presentations about BHL:
Public Wiki: http://biodivlib.wikispaces.com/Events
Private Wiki: https://bhl.wikispaces.com/BHL+Presentations

**The Spreadsheet**

Each year, the Program Manager should create a new sheet within the Presentations Spreadsheet, drag it to live behind the existing first sheet within the spreadsheet, and label

it with past year (temporarily, there will then be two sheets labeled as the same year). She should then copy all presentations listed on the existing sheet for that year (first sheet in spreadsheet) onto the new sheet, delete them from the original sheet, and relabel the original sheet with the new year. Staff submissions for the next year will then be added to the sheet now labeled with the next year's date.

Why copy last year's content onto a new sheet, rather than adding the new sheet and labeling it as the new year? The form will automatically input submissions from that form into the original first sheet created within the spreadsheet. Even if a new sheet is created and moved to the first sheet in the spreadsheet, the form will not populate that new sheet. Thus, the Program Manager must move the previous year's submissions to the new sheet each year and relabel the original sheet as the new year's sheet.

Since the form adds new submissions to this spreadsheet as they are entered, and not in chronological order, each month the Program Manager must rearrange the rows in the spreadsheet to ensure that they are in chronological order.

**The Calendar**

The BHL Conferences calendar mentioned above not only documents conferences BHL might be interested in, and submission deadlines, but also BHL Staff presentations at conferences.

Each month, the BHL Program Manager reviews the new submissions to the BHL Presentations spreadsheet. After rearranging any new additions in chronological order (new submissions are simply added to the end of the spreadsheet from the above form, so the Program Manager must manually place them in chronological order), the Program Manager should add appointments to the BHL Conferences calendar for any new BHL Staff presentations. These appointments should occur on the date of the presentation itself.

The appointments should be input with the following title style: "BHL Presentation: [Title of Presentation]"

Within the appointment body, the Program Manager should input the location as the city and state (or country) where the conference is being held. The calendar dropdown menu should be set to "Conferences and Meetings," and within the "Description" field, the Program Manager should input the name of the person giving the presentation, the name of the conference, and a link to the conference and presentation if available. The color for the appointment should be "Bold Green."

The Program Manager should also publicize any BHL staff upcoming conference presentations via tweets. Handles for the institutions that the staff are from, as well as handles or hashtags for that conference, should be included in all tweets.

**pan-BHL Conference**

BHL aims to host at least one pan-BHL conference per year. A pan-BHL conference is typically a booth at a conference paid for with BHL Dues funds. The Program Manager coordinates this booth presence and typically staffs the booth, or arranges for others to staff the booth.

In 2012 and 2013, the pan-BHL Conference was a booth at ALA Midwinter.

The BHL Dues budget allots $3,000 for conference costs (including booth rental, electricity, internet, carpet, furniture, shipping, etc.) and $1,500 for travel costs to bring a person to host the booth. The Program Manager is responsible for purchasing tasks associated with the booth.

The booth presence should be added as an upcoming event to the public wiki events page: http://biodivlib.wikispaces.com/Events. The Program Manager is responsible for adding the conference and details as an upcoming event and moving the record to a past event after the conference is over.

The Program Manager should also publicize the conference via a blog post before the event, a summary blog post after the event, and via Tweets. Hashtags and handles for the conference should be incorporated into the tweets.

## Goals

**Outreach Goal One: Increase awareness about BHL and grow our audience.**
**Outreach Goal Two: Keep people informed about project developments, services, and how to use them.**
- By simply doing presentations about BHL, we will increase awareness about our project and inform people about project news and updates. Metrics to measure this are:
  - Number of BHL Staff posters/papers/presentations each year (increase by 30% each year)
  - At least 1 pan-BHL conference each year.

Metrics related to BHL Conferences are recorded in the bi-annual Outreach Evaluation documents.

## LISTSERVS

### Audiences

Taxonomists, Scientists, Researchers, others as new listservs identified.

### Responsible Parties

**Program Manager**
- Responsibilities:
  - Manage Listserv Wiki Page, encouraging BHL staff to populate it
  - Providing listserv contacts with text to publish to the listserv, as required
    - Initial boilerplate text introducing BHL
    - Text about project updates, newsletter, or quarterly reports, linking to blog posts as applicable
  - Statistics

**BHL Staff**
- Responsibilities:
  - Adding listservs BHL should be involved in to Listserv wiki page
  - Serving as BHL representatives on listservs for which they are members
  - Recording submissions to listserv via form on wiki page

### Details

Listservs offer BHL another means of communication to reach users that may not be on social media or various other outreach platforms. To date, BHL's involvement in listservs (specifically non-BHL listservs discussed here) has been limited. In the future, listervs should be more utilized.

A wiki page has been created to document listservs BHL might be interested in participating in, as well as BHL member subscribers to those listervs and audience types: https://bhl.wikispaces.com/External+Listservs+Relevant+to+BHL

The Program Manager should encourage BHL staff to add to this wiki page any listservs they think BHL should participate in, for which we have posting ability. Those listed as the

BHL Listserv Member will serve as the contact for that listserv, posting BHL-related content as needed and responding to questions posed on that listserv related to BHL. These BHL Listservs Members should forward questions to appropriate parties if they cannot respond to questions posed on the listserv themselves.

When BHL staff post to a listserv, they should record that post via the Listserv Submission form on the above wiki page (https://bhl.wikispaces.com/External+Listservs+Relevant+to+BHL). Reponses to that form are recorded within this spreadsheet (https://docs.google.com/spreadsheet/ccc?key=0Ak0hDkSQMhfDdEVWajN0cHRqeVdNaV90M0Z4SG1Dcmc#gid=0). Staff should record when they reply to questions posed on these listservs as well, to help BHL determine most popular/effective listservs.

The Program Manager should send text periodically to BHL Listserv Members to post to these listservs. This includes:
- Boilerplate text (provided below) introducing BHL, to be sent as our first pan-BHL communication on that listserv, or periodically as a reminder if necessary
- Text regarding major project updates or events. This should come from blog posts, but be abbreviated versions of the text in the blog post, and should link to the blog post for more information
- Notification of new newsletters and quarterly reports

The text below can serve as boilerplate introductory text to be posted to listservs:

The Biodiversity Heritage Library

Do you need access to taxonomic and biodiversity literature for your research? Do you need to review a natural history rare book but don't have access to a library collection that owns it? Do you need to retrieve a species bibliography listing citations of species names occurrences throughout the published literature record? Do you want to be able to download copies of these books to your personal computer? Do you want all of this for free?

Check out the Biodiversity Heritage Library, an open access digital library for biodiversity literature. BHL provides free, full-text access to over 114,000 natural history books (amounting to over 40 million pages) digitized from the collections of its 15 members libraries and six global partner projects. BHL collections are truly comprehensive, spanning the 15$^{th}$-21$^{st}$ centuries, and including some of the rarest titles in the natural history canon.

You can download the full PDF of any book in BHL, as well as create custom PDFs from

select pages. Using BHL's taxonomic intelligence service (Advanced Search\Scientific Names), you can search for a specific scientific name and have a list of all mentions of that name throughout the BHL corpus returned to you as a species bibliography. Want something that BHL doesn't have? You can submit a request for the item to be scanned, free of charge to you!* Need access to scientific illustrations? BHL's Flickr account provides access to over 70,000 illustrations gleaned from the BHL collection, all made freely available under Creative Commons licenses.

Check out our collections today! Stay in touch with project updates via our Newsletter, Quarterly Reports, Blog, Facebook, and Twitter. Have questions, comments, or suggestions? Contact us today!

* Copyright and content availability restrictions apply. Learn more.

## Goals

**Outreach Goal One: Increase awareness about BHL and grow our audience.**
**Outreach Goal Two: Keep people informed about project developments, services, and how to use them.**

- Number of Submissions to listservs: A form has been created to document each time a BHL staffer posts to a listserv.

Metrics related to Listservs are recorded in the bi-annual Outreach Evaluation documents.

## Audiences

Scientists/Researchers; Citizen Scientists/People interested in Biodiversity; Librarians.

## Responsible Parties

### BHL Program Manager
- Responsibilities:
    - Create newsletter on quarterly basis
        - Reviewing newsletter before publication
        - Sending to Program Director for final review before publication
    - Announce newsletter via blog post and tweet
    - Adding new contacts to the BHL Newsletter list

### BHL Technician
- Responsibilities
    - Post newsletter blog post as Facebook post on day of blog publication

## Details

The quarters for the newsletters as based on seasons. The Summer Newsletter publishes in August. The Fall Newsletter publishes in November. The Winter Newsletter publishes in February. The Spring Newsletter publishes in May.

The due dates for the newsletter are documented on the BHL Administration calendar.

Archived versions of the newsletter as saved on the public wiki:
http://biodivlib.wikispaces.com/Newsletters

## Creating the Newsletter

BHL uses the Smithsonian Libraries' Constant Contact account to create and send newsletters.

http://www.constantcontact.com/index.jsp
Username: silibraries / Password: contact sheffieldc@si.edu

All BHL newsletters can be found in the BHL folder in Constant Contact (https://ui.constantcontact.com/rnavmap/email/home).

For each newsletter, the Program Manager should open the previous newsletter and hit "copy." This will create a copy of the newsletter. The Program Manager should then change the title of the newsletter (by clicking on the title to edit) to the appropriate title, in the style "BHL [enter season] [enter year] Newsletter."

The Program Manager can then edit the text and images in the copied, renamed newsletter for the new newsletter. The "About BHL" section of the newsletter should always be in each newsletter, and can remain from the previous copy. Each newsletter should have approximately five full news stories and three-five shorter stories under "More News and Events."

Full news stories should average 100 words and should link to corresponding blog posts for more information. When possible, Full News stories should include pictures with captions.

"More News and Events" stories should average 30-40 words and should link to corresponding blog posts for more information. "More News and Events" stories should not include pictures.

The Newsletter right-side banner should always include:
- A table of contents
- BHL at a Glance numbers with total volumes, pages, Flickr images, Twitter followers, and Facebook page likes
- Keep in Touch links, with links to the website, Facebook, Twitter, Flickr, the blog, and Pinterest
- A "Join our Mailing List" link, for those who access our newsletter via archived versions from Twitter, Facebook, or the blog
- A "Support BHL" section with a link to the Donate button
- A BHL Report section with link to the latest quarterly report on the public wiki (link should go directly to quarterly report document link)

Choosing Content for Newsletter

The Program Manager should choose content by first looking at the latest quarterly report. The updates provided within that report will most likely be appropriate for the newsletter. Text can be reused from the quarterly report text for the newsletter. The Program Manager should also refer to the blog and the BHL Highlights post (published to the internal SIL blog) to find any updates occurring in the month between the quarterly report publication and the newsletter preparation. Again, all stories should link to blog posts if possible for more information.

Editing Content in Newsletter

The content in the newsletter is organized by blocks, and each story in the main body or sidebar of the email is a separate block. To edit newsletter content, simply click on the block you want to edit and change the text. Use the formatting bar at the top of the block to change text and color options.

Standard header color: #A5B439
Standard Text color: #207799
Standard link color: #0000FF

Use the "Insert Link" button to add hyperlinks to the newsletter. The newsletter text should include as many relevant links as possible.

Adding Images to the Newsletter

To change existing pictures, click on the settings icon that appears when you hover over an image and click "change." Next, choose the method you want to use to add a new picture.

You can add a picture from Flickr by choosing "Image URL" and inserting the URL to the actual image. Be sure to add captions and image descriptions to the image, as well as have the image itself link to the corresponding blog post for the story the picture relates to or the link to the image in BHL.

To add a picture to the Constant Contact Library, choose "My Library"\"Upload New." Upload your picture, click on the image in the library, and edit caption, description, and link information. Again, always link the image to the corresponding blog post for that story or the link to the image in BHL.

To delete an existing picture without replacing it with a new one, click on the settings icon

that appears when you hover over an image and click "delete."

To add pictures to stories that do not have images, click on the block you want to add a picture to and in the left-hand side of Constant Contact, click "Insert Image." From there, you can choose the method for upload and the image you desire.


<span style="color:#993333">Publishing the Newsletter</span>

Once the newsletter is complete, click "Preview" in Constant Contact and send a test email to your email account (you do not need to send a test email to the default email that appears in the Email Addresses box). Once the test is received, check all content and test all links. Make changes to the newsletter as appropriate and continue to send test emails with each version iteration until satisfied with the final product.

Once the Program Manager is satisfied, send a test email to the Program Director for review using the same method above. Once the Program Director signs off, the newsletter can be sent.

To publish the newsletter, hit "continue" within the newsletter editing screen. The "From" and "Reply-to" email address should always be "feedback@biodiversitylibrary.org." This means that any responses, including automatic responses, to the newsletter will be sent to that email address. The BHL SIL Librarian monitors that email address.

The "From Name" should always be "Biodiversity Heritage Library."

In the "Send To" list, click Add/Edit, and choose the BHL Newsletter list.

Finally, edit the email subject line. To date, BHL Newsletters have always used "News from the Biodiversity Heritage Library" as the subject line. The Program Manager should consider testing alternative subject lines that are more provocative or interesting and may encourage more opens.

Do NOT use the Constant Contact Social Sharing option to send out an automatic tweet to the newsletter. The Program Manager will send out a tweet via Hootsuite for the newsletter instead, which will allow BHL to track clicks on links for that tweet.

Once all options are edited, click "Schedule." In the scheduling box, click the "Automatically archive email when sent" option and click the option to "send now." This will schedule the newsletter to publish.

Deadlines for publishing the newsletter are recorded on the BHL Administration calendar: https://www.google.com/calendar/ical/5mcem1pthqqae1hka60j1vhp7g%40group.calendar.google.com/public/basic.ics

## Filing the Newsletter

Once the newsletter is sent, it will be archived on this page: https://ui.constantcontact.com/rnavmap/evaluate.rnav/pidvlPaWMoQ410GbfHsH1XD632?activepage=ecampaign.archive&ctoken=304e7651-d69e-46b8-b39c-c476907e6824

Click the "URL" link of your email to get the URL to the archived version of the newsletter.

Save the newsletter archive link on this wiki page: http://biodivlib.wikispaces.com/Newsletters

## Publicizing the Newsletter

Once the Program Manager has inserted the archive link to the newsletter on the public wiki, she should create a blog post for the newsletter with a screenshot of part of the newsletter, a summary of the content included, and a link to the archived version of the newsletter. These posts should also include a link to the subscribe page for the BHL newsletter: http://www.sil.si.edu/bhl/newsletter/

The Program Manager should also schedule a tweet linking to the archived version of the newsletter. Hootsuite, and not Constant Contact, should be used to create this email so that BHL can track the clicks on links for the tweet. The tweet should say something like: "Wondering what #bhlib has been up to these past few months? Check out our latest newsletter to find out!" Whatever the wording chosen, be sure to include the #bhlib hashtag.

The BHL Technician will then post a Facebook post linking to that blog post and including the image used in the post.

## Adding Contacts

Whenever sign-up sheets are used at events to gather more email addresses for the newsletter, the Program Manager is responsible for adding them to the BHL Newsletter mailing list.

To do so, click on "Contacts" in Constant Contact, click "Add/Update," and choose the method you wish to use to add contacts. Once finished, click next to choose to add them to the BHL Newsletter list.

## Goals

The purpose of the newsletter is simply to keep people informed about project updates and progress. Thus, it speaks only towards goal two. Below are the metrics that will assess how well we're meeting goal two. These are recorded in the bi-annual BHL Outreach evaluation sheet.

**Outreach Goal Two: Keep people informed about project developments, services, and how to use them.**
- Total Newsletters: 4 per year
- Open rate of each email and average for year. This will show how many people are actually receiving project news updates via the newsletter.
- Percentage clicks on links average for year. This will show how many people are engaged with the information provided in the newsletter.

Metrics related to newsletters are recorded in the bi-annual Outreach Evaluation documents.

# QUARTERLY REPORT

## Audiences

Scientists/Researchers; Citizen Scientists/People interested in Biodiversity; Librarians.

## Responsible Parties

**BHL Program Manager**
- Responsibilities
    - Create reports on quarterly basis
    - Publicize reports via email lists, blog post, and Twitter

**BHL Technician**
- Responsibilities
    - Publish Facebook post linking to quarterly report blog post on day of blog post publication

## Details

The quarters for the quarterly reports coincide with the Federal Government Fiscal Year quarters (Q1=Oct 1-Dec 31; Q2=Jan 1-March 31; Q3=April 1-June 30; Q4=July 1-Sept.30).

Quarterly reports should publish around the middle of the month after the last month the report covers. So, the Q2 report should publish around April 15.

Deadlines for publishing quarterly reports are recorded on the BHL Administration calendar:
https://www.google.com/calendar/ical/5mcem1pthqqae1hka60j1vhp7g%40group.calendar.google.com/public/basic.ics

Quarterly Reports are saved as PDFs on the internal wiki (https://bhl.wikispaces.com/BHL+Reports, under BHL Quarterly Reports) and the public wiki (http://biodivlib.wikispaces.com/Reports).

## Creating the Report

Adobe InDesign is used to create the quarterly reports. Images gleaned from BHL should be incorporated throughout the report. JP2 versions of the images should be used, as the overall resolution for the report should be 300 dpi.

The BHL URL and the months represented within the report should be included in all footers and on the front and back cover of the report.

The BHL-Combined logo (http://biodivlib.wikispaces.com/BHL+Logo) should be included at least on the front and back covers of the report.

<span style="color:#a02020; text-decoration: underline;">Sections of the Quarterly Report</span>

The Quarterly Report consistently contains the following sections:

1. Project Highlights from the quarter
   ○ This includes a one-page narrative about the most important event occurring in the quarter as well as 5-6 short highlights on other major quarter events. Refer to blog posts published during the report period, as well as BHL Monthly Highlights posts (published to internal SIL blog) for topics to include and text to reuse.
2. Collections Profile
   ○ This section captures the BHL collections growth, global contributions, PDF and DOI growth, and Gemini statistics
3. Financials (to publish only once annually, in the Q2 report)
   ○ This section will be based on the In Kind Contributions numbers from the previous year, though care will be taken to avoid double counting. Numbers will include total project cost and revenue, cost and revenue breakdowns by BHL member institutions, Secretariat, and Technical Team, and Smithsonian Libraries and Missouri Botanical Garden subsidies for the BHL Secretariat and Technical Team.
4. Content Usage
   ○ The section captures traditional website statistics, but presents the information as statistics regarding the use of BHL content in general, beyond the website alone. Numbers include visits to combined BHL website and blog, usage by country, DOI resolutions, BHL website traffic sources, views on content combined from website (pageviews), blog (pageviews), and Flickr, and traffic to BHL from social media.
5. Users
   ○ This section captures the BHL audiences, looking beyond simply the

website. Numbers include unique visitors to the blog and website combined, ratio of new versus returning visitors, and social media audience growth.

6. Engagement
   ○ This section attempts to reflect how meaningful user interaction with our content is. Numbers include frequency, depth, and length metrics from the BHL website and social media engagement metrics:
      ■ Twitter: Clicks on Links and Retweets/Mentions
      ■ Facebook: Engaged Users and Interactions
      ■ Twitter: User-tagged images in Flickr, with correspondence to Flickr collection growth

7. About BHL
   ○ This section includes template BHL About text, as gleaned from the [BHL about page](#) and modified for length (see past reports); list of awards received by BHL, list of five recent scientific or scholarly publications utilizing or highlighting BHL, and staff and member information, including the BHL Secretariat and Technical Team Staff, BHL EC members, BHL Steering Committee and Institutional Council member institutions. Logos from each BHL member should also be incorporated into the report on the final page.

8. Testimonials
   ○ Scattered throughout the report should be testimonials from users gleaned from the Testimonials wiki page (https://bhl.wikispaces.com/Testimonials). The report should ideally also include a longer narrative relating a BHL and Our Users blog post (http://blog.biodiversitylibrary.org/search/label/bhl%20users).

The fourth quarter report should be an annual report. It should report project progress for that quarter as well as summarize highlights from the previous quarters. It should showcase statistics from the entire year, where normal statistics would not display full year stats.

Note: It is possible that financial reports will not be included in quarterly reports in the future. Possibly, a separate financial report will be issued for the Institutional Council Meeting. The Program Manager should discuss this further with the Program Director and Executive Committee.

Showcasing Progress within the Report

A major point of the quarterly report is to compare a given quarter's performance to a past

quarter, as well as a yearly average to give an idea of how BHL is performing over time.

Thus, for the following, compare the current quarter's numbers to the previous quarter's numbers and the past yearly average numbers:
- Traffic Sources
- Frequency/Depth/Length
  - Also show average minimum/maximum/moderate for each

For the following, compare the current quarter's numbers to the past yearly quarterly average numbers:
- Visits
- Views
- Visits to BHL from social media
- Unique Visitors

For the following, compare the current quarter's numbers to the previous quarter:
- DOI Resolutions

For the following, show growth over the past year:
- Social Media audience (Twitter, Facebook, Flickr)

For the following, show growth over the quarter:
- Twitter and Facebook engagement:
  - Twitter: Retweets/Mentions and Clicks on Links
  - Facebook: Interactions and Engaged Users

For the following, show all-time numbers:
- Number of Flickr images tagged by users, and as percentage of entire collection tagged.

For each of the metrics above, show the percentage increase (or decrease, if applicable) over the compared quarter, or, for metrics to show growth, show growth rate percentage, alongside graphs. This will tell users at a quick glance our progress for the quarter.


Publishing and Publicizing Quarterly Report

Once the Report is complete in InDesign, a PDF should be sent to the BHL Program Director for review. Once edits are incorporated, final PDFs (highest quality print versions) are created and added to the public and private wiki ((https://bhl.wikispaces.com/BHL+Reports, under BHL Quarterly Reports) and the public

wiki (http://biodivlib.wikispaces.com/Reports).

The BHL Program Manager will publish a blog post highlighting the new quarterly report and linking to the report on the public wiki. The Program Manager will also send out at least one tweet linking to the public wiki version of the report.

The BHL Technician will publish a Facebook post linking to the blog post about the quarterly report. The report front cover image should be the image used in the Facebook post.

The Program Manager should also send a link to the report to:

1. BHL IC Listserv (BHLIC@SI-LISTSERV.SI.EDU)
2. BHL Staff Listserv (BHL-STAFF@SI-LISTSERV.SI.EDU)
3. The following people in a unique, separate email:
   - Mata, Erick <MataE@si.edu>; Miller, Scott <MillerS@si.edu>; Pell, Eva <PellE@si.edu>; Schindel, David <schindeld@si.edu>; Hirsch, Leonard <LPH@si.edu>; Van Camp, Anne <VanCampA@si.edu>; 'brewster@archive.org'

## Goals

The purpose of the quarterly report is simply to keep people informed about project updates and progress. Thus, it speaks only towards goal two. Below are the metrics that will assess how well we're meeting goal two. These are recorded in the bi-annual BHL Outreach evaluation sheet.

**Outreach Goal Two: Keep people informed about project developments, services, and how to use them.**
- Publish 4 reports each year

Metrics related to the quarterly reports are recorded in the bi-annual Outreach Evaluation documents.

# PRESS RELEASES

## Audiences

Scientists/Researchers; Citizen Scientists/People interested in Biodiversity; Bibliophiles; Artists/Art Historians; Librarians; Techies;

## Responsible Parties

**Program Manager**
- Responsibilities
    - Drafting all press releases for BHL
    - Sending press release text to IC Listserv for reuse

## Details

The Program Manager is responsible for drafting press releases for BHL. Past press releases can be found here: S:ISD\BHL\BHL Directorate\Outreach and Communication\Press Releases

Press Releases for BHL are sent out through the Smithsonian Libraries or, if extremely significant, Smithsonian itself. The text for the Press Releases is also sent to the BHL IC Listserv for each member institution to reuse for publication via their own press outlets, if desired.

Press releases should on average be no longer than a single page in a Word Document. They should be drafted and saved as Microsoft Word Documents. Times New Roman and 12 pt font should be used.

The Program Director or other EC member will let the Program Manager know when a press release is required.

The Press Release Word Document should include:
- Title of Press Release, centered in bold text at the top of the document
- Body Text: text outlining the news story

- - Standard Informational language about BHL, at the very end of the release:
    - **About the Biodiversity Heritage Library**
      BHL partners comprise 15 natural history libraries in the U.S. and the United Kingdom. They are committed to working collaboratively to make biodiversity literature openly available to the world as part of a global biodiversity community. The BHL Secretariat is hosted by Smithsonian Libraries. The Technical Director and portal development team are hosted by Missouri Botanical Garden. Affiliated BHL projects have been established in Europe, China, Australia, Brazil, and Africa. To further explore the BHL, visit http://www.biodiversitylibrary.org/
      - (Update number of member institutions as this changes)

Once press releases are drafted, they should be sent to the Program Director for review. Once his edits are incorporated, the Program Manager will send the press release to Liz O'Brien (OBrienE@si.edu), Public Affairs Specialist for SIL. Indicate an approximate date by which you wish the press release to publish (give exact date if press release coincides with something specific) and indicate whether you want to publish only through SIL or through the SI wide press office.

Note: Publishing through the SI wide office should only be done for extremely significant events. The Program Director will tell the Program Manager whether to publish the release through SIL or SI. If through SI, significant lead time, up to one month, before required publication, is necessary. At least one week lead time is desired for SIL publication.

Liz will make final edits to the document and send to the Program Manager for final review. Once the Program Manager signs off, Liz will submit the press release for publication through SIL or SI.

The Program Manager should save the final version of the press release in the press releases folder: S:\ISD\BHL\BHL Directorate\Outreach and Communication\Press Releases and send the final document to the IC Listserv (BHLIC@SI-LISTSERV.SI.EDU), informing them that they can pass it on to their press offices if desired for publication as well.

Monitor the SIL press page (http://library.si.edu/press) for the press release publication. Once it appears, add the press release to the Press Release page on the public wiki (http://biodivlib.wikispaces.com/Press+Releases), linking to the electronic version from SI or SIL.

**Goals**

The purpose of press releases is simply to keep people informed about project updates and progress. Thus, it speaks only towards goal two. BHL cannot predict how many press releases it will need to publish each year. Thus, the only metric BHL keeps regarding press releases is a total number published each year. This is recorded in the bi-annual BHL Outreach evaluation sheet.

**Outreach Goal Two: Keep people informed about project developments, services, and how to use them.**

- Number of Press Releases published each year for BHL through SI or SIL

Metrics related to press releases are recorded in the bi-annual Outreach Evaluation documents

# APPLE

## Audiences

Citizen Scientists/People interested in Biodiversity; Bibliophiles; Artists/Art Historians.

Apple metrics indicate that 50% of our iTunes U users are between the ages of 25-49, and 50% are from the U.S.

## Responsible Parties

**Collections Coordinator**
- Responsibilities:
    - Lead Collections Committee in topic development for iTunes U collections, book selection for collections, and drafting collection description text
        - Targeting new books to add to existing collections, as required
    - Adding iTunes U-related campaigns to the BHL Editorial calendar
    - Oversee interns working on iTunes U-related campaigns
        - Approving tweets, blog post, and Facebook posts
        - Providing access to social media platforms, and revoking that access after internship conclusion, as required
        - Providing intern with identified book and topic materials for assist in content creation
    - Create iTunes U and BHL collections in BHL administrative dashboard
        - Adding new books to existing iTunes U and related BHL collections
            - New books to existing collections should be added one week prior to campaign, as it may take one week for these books to make it to iTunes U
        - BHL Collection descriptions include links to iTunes U collections
    - Updating campaign planning documents with campaign title, campaign dates, description information, collection URLs, and books used in collections (see campaign section)
        - Alerting BHL Technician (or interns, as applicable) when books available in campaign planning document to inform Flickr collection
    - Publish iTunes U collections in iTunes Friday prior to related campaigns, per appointment from BHL Technician

- ○ Set BHL Collection as featured collection Monday of related campaign, per appointment from BHL Technician

**BHL Technician**
- ● Responsibilities:
  - ○ Create artwork for iTunes U and BHL Collections, unless designated to interns
    - ■ Always .jpeg format
  - ○ Set due dates and responsible parties for campaign elements in campaign planning document (see campaigns section)
  - ○ Send appointments for iTunes U-related deadlines, as part of campaign planning process (see campaigns section)
  - ○ Create Flickr collections for iTunes U-related campaigns (unless designated to interns) incorporating images from books in the collections
  - ○ Compose tweets and Facebook post advertising iTunes U and BHL Collections during campaigns
    - ■ Tweets to publish 12pm on various days during the campaign
    - ■ Facebook post to publish on day interns do not draft a Facebook post
  - ○ Pin four images per day, related to campaign, to Pinterest, allowing automatic tweets. 8am and 2pm each day.
  - ○ Post Facebook posts composed by interns for iTunes U-related campaigns if interns not provided access to Facebook
  - ○ Adding iTunes U, BHL, and Flickr Collection links to intern blog posts and Facebook posts, as required
  - ○ Contacting identified collaboration candidates for iTunes U campaigns
  - ○ Archiving campaigns
  - ○ Campaign-related iTunes U statistics
  - ○ Create iBooks as required, with support from Program Manager and Director
    - ■ Create documentation for each iBook, outlining requirements, tasks, schedule, and expectations

**Program Manager**
- ● Responsibilities:
  - ○ Inform iTunes U and iBook topic selection
  - ○ iTunes U bi-annual statistics

## Details

Apple-related BHL projects should always coordinate with a BHL publicity campaign. Apple-related projects include iTunes U collections and iBooks.

## iTunes U Collections

iTunes U collections are collections of BHL books, structured around particular themes, that can be downloaded for free via the iTunes interface. The BHL iTunes U provider page is: https://itunes.apple.com/us/institution/biodiversity-heritage-library/id467689660

The Apple representative to BHL is Jill Vermillion (jvermillion@apple.com).

New BHL iTunes U collections are created on a quarterly basis. iTunes U collections by default form BHL Publicity Campaign topics.

Each iTunes U collection should contain at a minimum 6 books, and should contain no more than 35. iTunes U collections are generated by creating a collection within the BHL administrative dashboard (item-level collection) but then publishing that collection via iTunes U (http://admin.biodiversitylibrary.org/CollectionEdit.aspx). In General, BHL iTunes U collections should also be available as BHL Collections. The same collection may be published via both iTunes U and BHL, or two separate collections for each platform may be created if required (i.e., if it is desired that the BHL Collection contain more than 35 books. In that case, the BHL Collection may be as large as desired, but only select books from that collection will be added to the iTunes U collection). BHL Collection descriptions should include links to the iTunes U collection.

Instructions for creating and publishing iTunes U collections are available here: https://bhl.wikispaces.com/iTunesU

The collection URL, artwork, and collection description are implemented for an iTunes U collection within the BHL administrative dashboard, and from there are fed to the iTunes U collection.

Separate artwork must be created for iTunes U and BHL collections, as different template requirements exist for both. See the iTunes U wiki page (https://bhl.wikispaces.com/iTunesU) for the templates to use to create artwork. To use the templates, simply replace the image in the template with the desired image to represent the collection. Templates are provided in .psd format, but the final file for use on the BHL and iTunes U websites should always be in the .jpeg format to ensure proper display on all browsers.

When new iTunes U collections publish, the equivalent BHL Collection should be made the "featured collection" on the BHL Website. This is the collection that displays on the homepage of the BHL website. Set a collection to the "featured collection" within that

collection's editing page of the BHL administrative dashboard (http://admin.biodiversitylibrary.org/CollectionEdit.aspx). Be sure to set the BHL Collection, and not the iTunes U collection (if they are different) as the featured collection.

The Collections Coordinator is responsible for publishing the iTunes U collections and setting the equivalent BHL Collection to the featured collection, per the appointment provided by the BHL Technician for campaigns (see campaigns section). iTunes U collections should be published the Friday before a campaign starts, to ensure it properly publishes before the campaign. The BHL Collection should be made the featured collection the Monday the campaign starts.

Items may be added to an existing iTunes U collection at any time by adding them to the corresponding collection in BHL. These items will automatically be added to the iTunes U collection, though it may take up to a week for these additions to make it into iTunes U. In this way, existing collections may be reused in recurring campaigns. If they are for use in recurring campaigns, be sure items are added to the collection at least a week before the needed campaign to ensure enough time to display in iTunes U. The Collections Coordinator is responsible for adding new books to existing collections as required.

**Schedule for Creating iTunes U Collections**

Four iTunes U collections should be planned for each year. The Collections Committee, led by the Collections Coordinator, is responsible for choosing the topics for each iTunes U collection, the associated campaign dates, and the books for the collections. As stated, iTunes U collections by default form BHL publicity campaigns. At a minimum, BHL will host four publicity campaigns each year - structured around iTunes U collections. The BHL Technician is responsible for overseeing the production of campaigns, though interns will be highly utilized, particularly for iTunes U campaigns.

Each year in April or May, the Collections Coordinator will host a Collections Committee Call (or calls, as required) to identify the four topics for the iTunes U collections for that coming year (first to publish in the Fall, final in the following Summer). Before hosting this call, the Collections Coordinator will check with the Program Director and Program Manager to ensure that there are no particular topics these parties want covered in the collections (i.e. if the Program Director knows he wants extensive content related to a particular topic, he should voice that desire so plans can be made to support it). If topics are indicated, these should be included as an iTunes U topic that year.

The BHL Technician should join all iTunes U planning calls to provide input on topics.

Referring to the BHL Calendar for ideas if necessary, the Collections Committee will

identify four topics for iTunes U collections, the appropriate weeks for the campaigns associated with those collections, and some descriptive text for each campaign (descriptive text for planning document). The Collections Coordinator will then input those campaigns onto the BHL Editorial Calendar and fill out four campaign-planning documents with the titles of these campaigns, campaign dates, and campaign descriptions, for use in planning efforts (see campaign section).

Once these campaigns are on the calendar, the Collections Coordinator will alert the BHL Technician, who will set due dates and responsible parties within the planning document and input due dates for related campaign activities into the BHL Editorial calendar, sharing those appointments with those responsible for completing the tasks (see campaign section). These appointments should include due dates for iTunes U and BHL collections within the BHL administrative dashboard (Collections Coordinator; 1 week prior to campaign); Artwork due dates (BHL Technician or interns; 1 week prior to campaigns); due date for related Flickr collection (BHL Technician, or intern if designated; Friday before campaign); publication due date for iTunes U collection (Collections Coordinator; Friday before campaign); date by which to make the BHL Collection the featured collection in BHL (Collections Coordinator; Monday of campaign); blog due dates (BHL Technician or Intern; Thursday of campaign or alternative day matching specific date during the campaign).

Before the designated due dates for each collection completion, the Collections Coordinator will host Collections Committee calls aimed at identifying the books for each collection (both iTunes U and BHL collections, if different books in each collection) and drafting collection description information. Again, the BHL Technician should take part in these calls to suggest books. This book selection need not happen at the time of topic selection - it just must occur before the collection due date. The Collections Coordinator is then responsible for creating the collection(s) (i.e. BHL and iTunes U collections) in BHL with the descriptive information and correct collection designations (i.e. place of publication, URL to use, etc.).

The Collections Coordinator should update the campaign planning document with the collection URLs and list of books used in the collections. Once the books are added to the campaign planning document, the BHL Technician (or intern if applicable) should be informed so that images from those books can be incorporated into the campaign's Flickr collection.

The artwork for collections should generally be created by interns, but will be created by the BHL Technicians if no interns are available. The templates available on the BHL wiki page should be used (https://bhl.wikispaces.com/iTunesU). Due dates for these artworks are one week prior to the associated campaign, and artwork files should be sent to the Collections Coordinator when completed.

The Collections Coordinator will publish the iTunes U collection, and set the associated BHL collection as the featured collection, on the dates indicated in the appointments sent by the BHL Technician.

***Interns and iTunes U Campaigns***

The timing of the iTunes U topic selection (in late spring) was chosen so that BHL summer marketing interns can compose the content related to the four iTunes U campaigns during their summer internship.

BHL should strive to get at least one marketing intern each summer. These interns will use the campaign planning document (see campaign section) to draft a blog post, tweets, Facebook post, and Flickr collection (if desired) for the iTunes U campaign.

The interns will probably not have access to the actual books being used in the iTunes U or BHL collections (as likely, these will not have been identified prior to the internship). Thus, they should conduct their own research on the topic to identify factoids and related books in BHL. Any books identified should be recorded in the "BHL books utilized in this campaign" section of the campaign planning document (see campaign section). The Collections Coordinator can relay these books to the Collections Committee during collection book selection time, as these books may be chosen to be a part of the subsequent collections. The Collections Coordinator and BHL Technician should share any information about books or the topic at their disposal with the intern to help in the content composition process.

The intern is responsible for:
- Drafting a blog post related to the iTunes U theme
  - Typically a "book of the week" style, featuring a book relevant to the campaign
    - To publish in lieu of that week's book of the week
  - Send appointment for blog post to calendar
  - Include "book of the week" keyword in post and add book to "Book of the Week" collection in BHL
  - Include as tag campaign keyword identified (see below)
  - Drafting four tweets advertising the blog post (with factoids from the blog post) and the link to the permalink for the blog post, to publish in addition to the two tweets per day
    - Two tweets on day of publication, two tweets day after
    - Publish 10am (right at post publication time) and 1pm each day
    - Include as Hootsuite tag campaign keyword identified (see below)

- Drafting two tweets per day including factoids related to the campaign topic and links to BHL material
  - Include as Hootsuite tag campaign keyword identified (see below)
  - To publish at 11am and 3pm
- Drafting four Facebook posts including factoids related to the campaign topic, structured around images in BHL and including links to those images in BHL
  - One of these four posts should be a post about the blog post, with permalink to blog post included
- Begin creating Flickr collection for campaign if given access to Flickr collection, including uploading images from book used in blog post and adding that set to both the Flickr "Book of the Week" collection and created campaign collection
  - Otherwise BHL Technician will create Flickr collection for campaign and upload images from the book in the blog post to Flickr, adding to the campaign and Book of the Week Flickr collection
- Creating the required artwork for both of the iTunes U and BHL collections
  - Artwork should be sent to Collections Coordinator when complete

The Collections Coordinator is responsible for ensuring that the intern is given (and revoked after internship) access to the necessary accounts, and is responsible for reviewing, and if necessary approving (i.e. in Hootsuite) all content composed. Once content is scheduled, the BHL Technician should be informed for further review if desired and so that additional content can be created when necessary (see below).

During their research, interns should particularly look for BHL members or other entities that have a strong tie to the iTunes U topic. The handles for these institutions or entities should be included in Tweets and Facebook posts, and these should be recorded in the campaign planning document as handles used and collaboration candidates. Links to appropriate entities should be included in the blog post. Interns should also look for existing hashtags for the topic, including those in tweets and adding them to the campaign planning document "hashtags used" section.

The intern should also pick a keyword for the campaign, inserting this in the campaign planning document. This keyword will be added as a tag to the blog post and as a Hootsuite tag to all tweets composed.

***BHL Technician Responsibilities for iTunes U Campaigns***

The BHL Technician is responsible in general for campaigns. If no interns are available in a given year, or the intern(s) cannot complete all campaigns required, the BHL Technician is responsible for completing all required material.

If interns are used, the BHL Technician is still responsible for:

- Adding Due Dates for campaign to BHL calendar
- Adding dues dates and responsible party information to campaign planning documents
- Finalizing (or creating) campaign Flickr collections
  - Campaign Flickr collections should include images from the books used in the BHL and iTunes U collections. These books will likely not be chosen by the time the intern works on the campaign. Thus, at a minimum, the BHL Technician will add these books to the campaign Flickr collection
  - The intern may not be given Flickr access due to password concerns. In that case, the BHL Technician is responsible for creating the entire Flickr collection, including uploading the book used in the blog post and adding to the Book of the Week and campaign Flickr collection
- Composing tweets about the BHL, iTunes U, and Flickr collections
  - The links for the collections will likely not be available at the time of the internship. Thus, the BHL Technician is responsible for composing tweets advertising the BHL, iTunes U, and Flickr collections. These should publish at 12pm on various campaign days and should include the Hootsuite campaign tag
- Adding BHL, iTunes U, and Flickr collection links to the blog post
  - Again, as these links will likely not be available at the time of the internship, the BHL Technician must add these links to the intern's blog post
- Pinning four images related to campaign per day to Pinterest, sharing via automatic tweets. To publish 8am, 2pm each day.
- Contacting suggested collaboration candidates
  - The intern will identify BHL member and other institutions with strong ties to the topics chosen. The BHL Technician should contact social media representatives at these institutions, if possible, informing them of the campaign, its tie to that institution, and requesting post sharing
- Composing a Facebook post advertising the BHL, iTunes U, and Flickr collections
  - On the day that the intern does not schedule a Facebook post, the BHL Technician should compose a post advertising the collections created
  - If interns are not granted access to Facebook, the Technician must also publish the Facebook posts provided by the interns.
- Creating artwork for BHL and iTunes U collections if not created by interns
  - Artwork should be sent to Collections Coordinator when complete
- Archiving campaigns
- Statistics
  - Technician responsible for gathering iTunes U statistics for campaign evaluations

## iBooks

BHL has the ability to create iBooks with BHL content. iBooks are digital books created around particular topics, incorporating BHL content, and made freely available within iTunes.

Creating iBooks is an extremely time-intensive project. It is recommended that no more than one iBook be attempted each year, unless interns or additional resources are provided to support their creation.

iBooks may be created to support grants or other collaborative relationships, as required, but should involve financial or resource support if required.

The Program Director will provide notice about any iBooks required. The BHL Technician, unless designated to interns or new resources, is required to create all iBooks.

Before iTunes U topics are chosen, the Collections Coordinator will ask the Program Director if he knows of any topics he needs content for. This should specifically include notification of any iBooks topic that will be required. iTunes U collections should be chosen to match those required topics (thus also resulting in a campaign on that topic), if notification provided.

Since iBooks require so much labor, content reuse should be employed whenever possible. Thus, iTunes U collections and related campaign material to support those collections should be used to support the iBook.

Ideally, no iBook topic would be requested that did not have a supporting campaign. Thus, even if an iTunes U topic was not created to support the iBook, an additional campaign (see campaigns section) should be organized to support the iBook.

The goal of each iBook, and the audience being reached, must be decided on an individual iBook basis. The same goals and audiences may not apply for all iBooks. Thus, when iBook topics are identified, the Program Director, Manager, and Technician should meet to discuss the requirements for the book, desired audience, goals, and format. Any considerations identified should be incorporated into campaigns, if applicable. Metrics for measuring each iBook success must be decided on an individual basis, as well as who will keep those metrics, how they will be gathered, and where they will be published.

Documentation for each iBook should be created by the BHL Technician at the time of

iBook planning outlining:
- Goals for book
- Audience
- Format
- Required Tasks
- Schedule
- Due Date
- Metrics
- Publishing Outlets
- Publicity methods

## Goals

Our goals for our Apple projects (iTunes U and iBooks) relate to Increasing Awareness about BHL and Growing our Audience and Raising Awareness about Biodiversity Topics using BHL Content.

No metrics related to iBooks are currently being recorded. The BHL Program Manager and BHL Technician should meet once iBooks are published to determine final goals, metrics to keep, and where to record/when to gather those metrics.

Metrics related to iTunes U collections are kept in regards to their relationship with campaigns and their overall performance. Thus, metrics related to iTunes U are recorded in the bi-annual Outreach Evaluation documents and the Campaign Evaluation Documents.

**Outreach Goal One: Increase awareness about BHL and grow our audience.**
The fact that people browse, download, and use iTunes U collection material indicates that they are being made aware of BHL and, by using our content, growing our BHL audience. Thus, the bi-annual evaluation document measures iTunes U:
- Browses
- Downloads
- Subscriptions

**Outreach Goal Three: Raise awareness and foster dialogue within BHL audiences about biodiversity topics and corpus publications using BHL collections.**
- Campaign Performance: Campaigns are structured around particular biodiversity themes, and the iTunes U collections support those campaigns. Thus, the campaign evaluation measures the browses, downloads, and subscriptions the campaign's iTunes U collection receives during the campaign week to determine how well that iTunes U collection informed the conversation about that campaign

topic. The performance of all iTunes U collections during campaign weeks are compared within the campaign evaluation document to determine which iTunes U collections best informed the biodiversity conversation occurring during that campaign.

Note: The whole point of iTunes U collections is that users can download BHL material within iTunes U instead of BHL. Thus, the goal of iTunes U is not bring users back to BHL, but simply to provide another outlet for them to obtain BHL material. Thus, goal four does not apply to iTunes U collections.

## EXHIBITIONS

### Audiences

Citizen Scientists/People interested in Biodiversity; Bibliophiles; Artists/Art Historians.

### Responsible Parties

Responsible parties to be determined once BLE projects pursued. A BLE team should be created for each BLE project, with a designated BLE Project Manager. This Project Manager will assign responsibilities to appropriate people.

### Details

BHL-Europe created Biodiversity Library Exhibitions (BLE, http://www.biodiversityexhibition.com), a platform on which BHL staff can created online exhibitions structured around various themes that include stories, factoids, links to BHL books, and multi-media content. Jiri Frank (jiri_frank@nm.cz) is the contact for BLE. BLE currently contains four exhibitions created by BHL-Europe.

As indicated, this platform has been made available to all global BHL staff, allowing anyone to create an exhibition if desired.

BLE offers a variety of benefits for BHL, including a more engaging way to provide context and extended content about BHL materials, showcase BHL materials to new audiences, provide educational outreach potential, and contextualize BHL material with other content, like videos and specimens.

However, creating BLEs is an extremely time-intensive project. It is recommended that no more than one BLE be attempted each year, and only if interns or additional resources are provided to support their creation. BLEs may be built into grant proposals, and serve as a final deliverable for a grant topic, but if these are incorporated into grants, efforts must be made to ensure that the ability to hire additional resources is also built into the grant.

The Program Director will provide notice about any BLEs required. The Program Director will assemble a team to tackle the BLE project, likely led by the Program Manager but involving the BHL Technicians and Collections Coordinator, as well as, hopefully, additional resources.

As BLEs are so labor intensive, it is best if their topic coincides with a campaign topic, and ideally an iTunes U campaign topic, to ensure that material is already being gathered for the topic and to make the process as efficient as possible. Ideally, if iBooks are also required, the BLE should match the iBook campaign topic, to further ensure the most efficient use of resources.

Thus, before campaign topics are chosen, the Collections Coordinator and BHL Technician will ask the Program Director if he knows of any topics he needs content for. This should specifically include notification of any BLE topic that will be required. Campaigns should be chosen to match those required topics.

The goal of each BLE, and the audience being reached, must be decided on an individual BLE basis. The same goals and audiences may not apply for all BLEs. Thus, when BLE topics are identified, the Program Director and associated parties should meet to discuss the requirements for the exhibition, desired audience, goals, and format. Any considerations identified should be incorporated into campaigns, if applicable. Metrics for measuring each BLE success must be decided on an individual basis, as well as who will keep those metrics, how they will be gathered, and where they will be published.

A BLE-specific project manager should be identified. This may be an existing BHL staff person, or a new staffer made available through grant resources. This project manager will be responsible for overseeing the BLE project, identifying content required and responsible parties, and outlining due dates for materials. Documentation for each BLE should be created by the BLE project manager at the start of BLE planning, outlining:
- Goals for BLE
- Audience
- Format
- Required Tasks
- Schedule
- Due Date
- Metrics
- Publishing Outlets
- Publicity methods

No metrics are currently being recorded for BLEs, as BHL-US/UK has no BLEs. Goals, and the associated metrics, as outlined above, will be determined on an individual BLE

basis.

## Audiences

Citizen Scientists/People interested in Biodiversity; Bibliophiles; Artists/Art Historians.

## Responsible Parties

**Program Manager**
- Responsibilities:
  - Ordering swag as required
  - Storing swag
  - Shipping swag to BHL Member institutions, as requested
  - Maintaining and Updating Swag wiki page (https://bhl.wikispaces.com/BHL+Promotional+Materials)
  - Statistics

**BHL Staff**
- Responsibilities
  - Distribute BHL swag whenever possible
  - Request swag supplies from Program Manager

## Details

BHL Swag refers to materials created that promote the BHL project. These include business cards, buttons, pens, stickers, notebooks, brochures, and as needed folders and bags. It may also include additional items created on an as-needed basis, for particular occasions.

The BHL Program Manager is responsible for creating and purchasing all swag, though collaboration with a designer may be utilized if available. BHL swag is purchased out of BHL Dues funds, and is thus available to any BHL member that requests it. As the Program Manager is responsible for ordering swag, it is stored at the Smithsonian Libraries, but the BHL FedEx account may be used to ship requested swag to BHL members. Members should contact the Program Manager to request swag.

The Program Manager should ensure that, if funds are available, a supply of the following is maintained:

- Business Cards
- Buttons
- Stickers
- Pens
- Mini Notebooks
- Greeting Cards
- Brochures

Note: A new version of the BHL Brochure (replacing the 2011 version) is planned as part of the Smithsonian Libraries rebranding efforts. The Smithsonian Libraries will cover the design and printing costs of these brochures as part of their rebranding contract, but BHL must wait on the Smithsonian Libraries' timeline to obtain new brochures. The current stock of 2011 brochures is depleted, and new brochures will not be made available until the Smithsonian Libraries' contract moves forward. Liz O'Brien of Smithsonian Libraries is the contact for the new BHL Brochures.

The image files used to create swag outlined above, and links to the vendors providing the swag, are available on this wiki page: https://bhl.wikispaces.com/BHL+Promotional+Material

The Program Manager should update the files, prices, vendors, and swag types on this wiki page as required, and this wiki page will serve as the document of all BHL swag.

The Program Manager should keep a record of all swag purchased (ASOs and Receipts) within these folders for future reference and reporting requirements:
- S:\ISD\BHL\BHL Directorate\BHL Financials\Purchasing Categories\Swag
- The fund folder that paid for the swag in: S:ISD\BHL\BHL Directorate\BHL Financials\[Fund Folder]\ASOs

Swag should be distributed at every opportunity, including within BHL member libraries, during meetings and conferences, when giving tours, or simply when talking about BHL with the public.

The BHL Greeting Cards are utilized by Smithsonian Developer Staff as Thank You cards for BHL donations, but may also be used for other outreach purposes.

## Goals

The goal of swag is to increase awareness about BHL and build the BHL audiences. Every opportunity by all member libraries should be utilized to distribute swag. Thus, the metrics gathered related to swag are meant to capture how much swag was distributed in a year

(based on supply stock at the end of the year) and the amount spent on swag in that year, in order to give an idea of how much to budget for the coming year.

**Outreach Goal One: Increase awareness about BHL and grow our audience.**
- Total swag in each category ordered per year
- Total swag remaining in each category per year
- Total spent on swag per year

Metrics related to swag are recorded in the bi-annual Outreach Evaluation documents.

## PUBLIC WIKI

### Audiences

Citizen Scientists/People interested in Biodiversity; Bibliophiles; Artists/Art Historians.

### Responsible Parties

**Program Manager**
- Responsibilities:
    - Statistics
        - Communicate to individuals responsible for the most popular pages need to keep those updated

**Page Contacts**
- Definition: Those listed in this document as responsible parties for various public wiki pages (https://docs.google.com/spreadsheet/ccc?key=0Ak0hDkSQMhfDdER2ZnVlODI5a0RlbW5WajhveUFPcGc&usp=sharing)
- Responsibilities:
    - Keep those pages assigned to them updated
    - Prioritize those indicated by the Program Manager as most popular
    - Update responsible party for their pages if changes occur

**Collections Coordinator and SIL Digital Projects Librarian (Erin Thomas)**
- Responsibilities
    - Revamping public wiki (efforts led by Erin Thomas. Collections Coordinator support)

### Details

The public wiki is meant to be an informational platform for users - to provide information and instruction about BHL to users. It provides the BHL About information, tutorials, outreach material, special project information, and collections development information, among other things. Multiple parties are responsible for keeping the public wiki updated.

A record of those responsible for various pages in the public wiki can be found here:

https://docs.google.com/spreadsheet/ccc?key=0Ak0hDkSQMhfDdER2ZnVIODI5a0RlbW5WajhveUFPcGc&usp=sharing

Those listed as the responsible party for each page are responsible for keeping those pages updated. When the Program Manager performs the bi-annual review of the public wiki, she will contact those listed as responsible for the most popular pages to inform them that those pages are priorities to keep updated.

If the responsible party for a page changes, it is the responsibility of the previous responsible party to update this spreadsheet (https://docs.google.com/spreadsheet/ccc?key=0Ak0hDkSQMhfDdER2ZnVIODI5a0RlbW5WajhveUFPcGc&usp=sharing) with the new responsible party's name.

Currently, the pubic wiki is in the midst of a rehaul, as many pages, particularly the tutorials, are outdated. Contact Erin Thomas (thomase@si.edu) and Bianca Crowley (crowleyb@si.edu) about current progress and planned revisions.


## Goals

**Outreach Goal One: Increase awareness about BHL and grow our audience.**
**Outreach Goal Two: Keep people informed about project developments, services, and how to use them.**
The public wiki is meant to be an informational platform for users - to provide information and instruction about BHL to users. Thus, generally, the public wiki mostly supports goal two. However, it may also increase the public's awareness of BHL, either as they stumble upon the wiki via organic searching or simply that they're made more aware of what BHL is. Thus, it does speak to a certain degree to goal one as well.

- Visits: Google Analytics has been deployed for the public wiki. Knowing how well it keeps people informed about project updates and increases awareness of BHL is related to how much it is used. This is revealed through visits and unique visitors.
- Unique Visitors: Google Analytics, see above
- Most Popular Pages: Google Analytics will show the most popular pages on a website. This will be useful for BHL staff, as they will know the most important and effective pages to keep updated.
- Length: To determine how effective the public wiki is at communicating project information, it is useful to determine how long users stay on the public wiki.

Metrics related to the public wiki are recorded in the bi-annual Outreach Evaluation documents. In the future, the Program Manager may decide that it is worthwhile to keep monthly stats on the public wiki.

# SPECIAL STRATEGIES

## STRATEGIES FOR CONTENT CHOICE AND ORGANIZATION: CALENDAR

### Responsible Parties

**BHL Program Manager**
- Responsibilities
  - Managing the BHL Calendar
  - Adding new appointments to all calendars
    - Managing all blog post related appointments, unless designated to interns, Technician, or Collections Coordinator (below)
    - Managing all biodiversity event related appointments
    - Managing all conference and meeting appointments
    - Managing all conference call line appointments
    - Managing all Administration appointments
    - Managing all milestone appointments
  - Approving or adding staff or guest submissions to the calendar

**BHL Technician**
- Responsibilities
  - Adding BHL Campaigns, campaign due dates, and related blog posts to the calendar, unless designated to an intern

**Collections Coordinator**
- Responsibilities
  - Adding iTunes U collection campaigns to the calendar
  - Ensuring interns post appointments for blog posts to calendar

**BHL Global Coordinator**
- Responsibilities
  - Managing the Global Biodiversity Heritage Library calendar

### Details

Content choice for general outreach is driven by the BHL Calendar. The BHL Calendar is also used to organize BHL events of interest, social media activities, and document

project progress.

The calendar is tied to the biodiversitylibrary@gmail.com account. Contact the Program Manager for login information to this account if required.

The Collections Coordinator is responsible for updating the biodiversitylibrary@gmail.com password, as required.

The BHL calendar (all calendars) is embedded into this wiki page: https://bhl.wikispaces.com/BHL+Calendar

The BHL Calendar is made up of several individual calendars brought together into a single calendar. The creation of separate calendars based on topic allows only certain events to be displayed on particular pages, depending on the information required.

The BHL Calendar is managed by the Program Manager, but all staff are encouraged to add appointments to the calendar. Staff can add appointment by simply sending a calendar appointment to biodiversitylibrary@gmail.com or by adding submissions via this form: https://docs.google.com/spreadsheet/viewform?formkey=dGV3bW9iZXRibWIxVks4MDNIX 3BLOFE6MQ#gid=0. This form feeds this google spreadsheet: https://docs.google.com/spreadsheet/ccc?key=0Ak0hDkSQMhfDdGV3bW9iZXRibWIxVks 4MDNIX3BLOFE#gid=0.

The Program Manager must approve any appointments sent to the biodiversitylibrary@gmail.com account. These appointments will appear in the biodiversitylibrary@gmail.com inbox. Once the appointments are approved, the Program Manager must ensure that they are transferred to the appropriate BHL calendar (see below).

On a monthly basis, the Program Manager will review the staff calendar submission spreadsheet and add any new items to the calendar. Once new submissions are added, the text "added to calendar" should be added to the corresponding row in column I of the spreadsheet.

Below are the various BHL calendars included in the overall calendar, the types of posts to add to those calendars, and the sheets on which they are embedded.

Editorial

The Editorial calendar is used to organize and inform outreach activities. It includes appointments about biodiversity-related events, such as biodiversity holidays (i.e. Polar Bear Awareness Day) and biodiversity scientist, author, or artist birthdays. It is also used to document postings for the BHL Blog and BHL campaigns.

Biodiversity-related events appointments should be added to the calendar in the color "green" and should be made to repeat annually, if the event is an annually-repeating occasion. The Program Manager is primarily responsible for adding new biodiversity-related events to the calendar, but should encourage staff to help. The description field in these appointments should include more information about the event, person whose birthday is documented, and links to relevant external sites.

BHL staff composing social media content, such as blog posts, tweets, or Facebook posts, should refer to the editorial calendar each day to see if there are any events to celebrate, and should structure their content around those events.

Blog post appointments should be added to the calendar in "gray." All blog posts should be documented on the editorial calendar. The "Book of the Week" appointments recur every Thursday and the "BHL Users" appointments recur every third Tuesday of each month, as these are the typical posting days for these types of posts. If these posts need to publish on a day other than the standard day, the appointment for that week in the calendar should be changed to the appropriate day. The Program Manager is responsible for documenting all blog posts on the calendar, except those related to campaigns (see campaigns for more information) or interns.

"Book of the Week" and "BHL Users" calendar appointments should be updated individually to indicate the topic or interviewee name in the "Description" box in each appointment.

**Campaigns and the Calendar**

The Editorial calendar should also document BHL publicity campaigns. The Collections Coordinator is responsible for adding iTunes U-related campaigns to the calendar. The BHL Technician is responsible for adding all other publicity campaigns to the calendar, unless designated to an intern.

Each campaign should be added to the calendar as an appointment in "green," with the appointment lasting the entire week of the campaign. The BHL Technician should also input appointments for due dates related to the campaigns into the Editorial calendar, including Flickr, BHL, and iTunes U BHL collections (the collection in the BHL database that will feed the iTunes U collection), artwork, and blog due dates. These appointments

should be added in "green," and shared with the person responsible for completing the task.

The actual publication date for the iTunes U collections should also be published on the calendar. The iTunes U collections should always publish the Friday before the campaign. The Collections Coordinator is responsible for publishing the iTunes U collection, but the BHL Technician adds the iTunes U publication appointments to the calendar and shares them with the Collections Coordinator to ensure they are published on time.

During the week of a campaign, the blog posts publishing for that campaign should be documented on the editorial calendar. If the post will publish as the Book of the Week, the recurring Book of the Week appointment should simply be updated to reflect the campaign topic. If the blog post will publish on a day other than the Book of the Week day, the Book of the Week appointment should be moved to the correct day and updated with the topic. The BHL Technician is responsible for documenting campaign blog posts on the calendar, unless designated to an intern.

**Interns and the Editorial Calendar**

Interns are responsible for submitting appointments for any blog posts, campaign-related or otherwise, to the BHL calendar. The Program Manager will approve these submissions and ensure that they appear on the correct calendar. The Collections Coordinator is responsible for ensuring that interns provide these submissions.


Administration

The Administration calendar is managed by the Program Manager. It is used to document administrative-related events, such as quarterly report and newsletter dues dates, budget and finance related due dates, report related due dates, and relevant grant-related due dates (grant end dates and spending end dates for grants managed by Smithsonian Libraries).

Appointments for the Administration calendar should be added in "red."


BHL Conference Call Line One

The BHL Conference Call Line One calendar is used to reserve the BHL "staff" conference line:

Dial: 1-877-860-3058
If dialing internationally, please see CenturyLink's list of international numbers
Enter the passcode: contact crowleyb@si.edu
Moderator code: contact crowleyb@si.edu

This is the conference line used by BHL staff for monthly staff calls, collections calls, and related staff conversations. If staff desire to use this line, they must contact the Program Manager to reserve it. The Program Manager will check the calendar to ensure there are no conflicting appointments and add the reservation to the calendar if available.

The calendar has standing appointments for the third Thursday of every month (Staff Call) and every other Monday (Collections Call).

Appointments for the Conference Call Line One calendar should be added in "orange."


BHL Conference Call Line Two

The BHL Conference Call Line Two calendar is used to reserve the BHL "governance" conference line:

Dial: 1-877-820-7829
If dialing from Australia, use this number: 1 800 547 099
If dialing from UK, use this number: 0 800 358 8173
Enter the passcode: contact crowleyb@si.edu
Moderator code: contact crowleyb@si.edu

This is the conference line used by BHL governing bodies (i.e. Executive Committee, Steering Committee, Institutional Council) for weekly EC calls, monthly SC calls, global calls, and related governance conversations. If staff desire to use this line, they must contact the Program Manager to reserve it. The Program Manager will check the calendar to ensure there are no conflicting appointments and add the reservation to the calendar if available.

This calendar has standing appointments each Thursday (EC calls) and the fourth Thursday of each month (SC calls).

Appointments for the Conference Call Line Two calendar should be added in "pink."


BHL Milestones

Important project milestones are documented on the BHL Milestones calendar. These include launch dates (i.e. Launch of iTunes U, partner projects), new partners joining, major portal developments (new user interface), and important project dates (i.e. day BHL hit 40 million pages).

The Program Manager manages and adds appointments to this calendar. Typically, appointments should be made to repeat annually, and the appointment title should include in parenthesis the year in which it happened (i.e. New User Interface (2013)). This allows staff in the future in any given year to know when major events occurred. BHL Outreach staff should also tweet or otherwise highlight (i.e. in blog posts if appropriate) important milestone events as anniversaries.

Milestone appointments should be added to the calendar in "purple."


Conferences and Meetings

The conferences and Meetings calendar is used to track conference dates that BHL might be interested in, proposal submission deadlines for those conferences, BHL staff presentations at conferences, and BHL meetings.

The Conferences and Meetings calendar is embedded into this wiki page: https://bhl.wikispaces.com/Conferences+and+Grants

At the beginning of each year, the Program Manager should input into the BHL Conferences Calendar the conference dates and submission deadline dates for conferences BHL typically or might want to participate in (as articulated in conferences section). On a monthly basis, the Program Manager will also add any conferences added to the Conferences and Grants wiki page to the calendar: https://bhl.wikispaces.com/Conferences+and+Grants.

Each month, the BHL Program Manager also reviews the new submissions to the BHL Presentations spreadsheet and adds appointments to the BHL Conferences calendar for any new BHL Staff presentations. These appointments should occur on the date of the presentation itself.

The appointments should be input with the following title style: "BHL Presentation: [Title of Presentation]"

Within the appointment body, the Program Manager should input the location as the city

and state (or country) where the conference is being held. The calendar dropdown menu should be set to "Conferences and Meetings," and within the "Description" field, the Program Manager should input the name of the person giving the presentation, the name of the conference, and a link to the conference and presentation if available.

The Program Manager is also responsible for adding any BHL Meeting dates (such as the annual IC meeting) and the pan-BHL conference each year to the Conferences and Meetings calendar.

The Program Manager is also responsible for scheduling tweets about any upcoming staff presentations and the pan-BHL conference.

The color for all Conferences and Meetings appointments should be "Bold Green."


## Global Biodiversity Heritage Library

The Global Biodiversity Heritage Library calendar is used to track appointments related to global BHL events. It is managed and maintained by the BHL Global Coordinator. Occasionally, there may be overlap between the global calendar, milestones calendar, and conferences and meetings calendar, which is not a big deal.

Events are added to the Global Biodiversity Heritage Library calendar in "yellow."

## STRATEGIES TO BUILD AUDIENCES: CAMPAIGNS

### Responsible Parties

**BHL Technician**
- Responsibilities:
  - Creating new Campaign Planning and Evaluation spreadsheet each year
  - Identifying non-iTunes U campaign topics and dates, in collaboration with the Program Manager
  - Populating non-iTunes U campaign Title, Date, Description, and Keyword fields in the planning document
    - Adding Keyword to iTunes U campaigns if not populated by an intern
  - Adding non-iTunes U campaigns to the BHL Editorial Calendar
  - Adding Responsible Parties and Due dates to each element for each campaign in the planning document
  - Adding Due Dates to the BHL Editorial Calendar for each specified task and sharing those appointments with the people assigned to the task
  - Populating all required fields in the Elements section of each campaign in the planning document, unless designated elsewhere
  - Composing all Facebook Posts, Tweets, and the Blog Post for all non-iTunes U campaigns, unless designated to another person (for example, an intern)
    - Adding campaign keyword as Hootsuite tag to all campaign tweets
    - Adding "book of the week" and the campaign keyword as tags to the blog post
    - Documenting the blog post on the BHL Editorial Calendar
    - Adding the book featured in the blog post to the BHL Book of the Week collection.
    - Including Flickr, iTunes U, and BHL collection links in blog post
  - Adding BHL, iTunes U, and Flickr collection links to the blog post for non-iTunes U campaigns, if written by someone else
  - Flickr, iTunes U, and BHL Collection Facebook post for iTunes U campaigns
  - Flickr, iTunes U, and BHL Collection Tweets for iTunes U campaigns
  - Pinning images related to campaign on Pinterest and sharing via automatic Tweets
  - Archiving the Tweets and Facebook posts for all campaigns
    - Setting up Hootsuite Archive for "[campaign keyword] @BioDivLibrary"
  - Creating the Flickr collection for the campaign (unless assigned elsewhere)
    - Collection should include images from all appropriate books in the

BHL and/or iTunes U collections, if applicable
- ■ Adding books added to Flickr collection to "Books Used" section of campaign planning document, unless already documented
- ○ Uploading the blog post book's images to Flickr (unless assigned elsewhere)
  - ■ Adding the set to the "Book of the Week" collection and the campaign Flickr collection
- ○ Arranging collaborations with identified institutions or entities for the campaign
- ○ Creating artwork for BHL and/or iTunes U collections, unless otherwise assigned
- ○ Evaluating campaigns using Campaign Planning and Evaluation document

**Collections Coordinator**
- ● Responsibilities:
  - ○ In collaboration with Collections Committee, identifying topics and dates for four iTunes U collections and associated campaigns per year
    - ■ Adding iTunes U campaign titles, dates, and descriptions to the campaign planning document
    - ■ Adding iTunes U campaign dates to the Editorial Calendar
    - ■ Alerting BHL Technician when iTunes U campaign information available in campaign planning document
  - ○ Leading Collections Committee in identification of books and descriptive information for all BHL Collections and iTunes U Collections
    - ■ Adding books used for the collections in the "Books Used" section of the campaign planning document
    - ■ Alerting BHL Technician when "Books Used" available for use in Flickr collection creation
  - ○ Creating all required BHL collections and iTunes U collections in BHL for campaigns
    - ■ Setting BHL collection as featured collection in BHL on the first Monday of campaign
  - ○ Publishing all iTunes U collections in iTunes U
  - ○ Overseeing interns working on campaigns

**Program Manager**
- ● Responsibilities:
  - ○ Contributing to campaign topic choices for iTunes U and non-iTunes U campaigns

## Details

**Definition:** Publicity campaigns featured by BHL using our outreach platforms. Typically, campaigns last one week, and during a campaign, the content communicated via outreach supports the campaign topic.

**Goal of Campaigns:** The goal of a campaign is to identify "hot" topics related to either biodiversity, digital libraries, or bioinformatics with existing large followings and contribute to the conversation using BHL resources. By using hashtags, referring to existing Facebook pages, linking to articles and blogs, or collaborating with invested parties, BHL will tap into to an already existing audience and increase awareness about BHL content among those users. While we hope to increase these users' knowledge about these topics by sharing information via our outlets, the **primary goal of a campaign is to increase the BHL audience and traffic back to BHL via these outreach platforms.**

**Frequency:** BHL strives to run one publicity campaign each month. At a minimum, BHL should run four publicity campaigns per year, structured around the quarterly iTunes U collections.

**Evaluating Campaigns:** Campaigns are evaluated based on how much they increase traffic to BHL from social media platforms during a campaign, as compared to non-campaign periods, and by how much more they grow the BHL audience on Facebook, Twitter, and the Blog as compared to audience growth during non-campaign periods. For iTunes U-related campaigns, the iTunes U collection for that campaign is compared to non-campaign iTunes U collections performance during the campaign period. This evaluates how well the iTunes U collection helps inform the topic being discussed in the campaign, as compared to non-campaign collections.

## Campaigns to Date

BHL began running publicity campaigns in August, 2012. In 2012, publicity campaigns increased traffic to BHL from our social media platforms by 68% over non-campaign periods. Our best performing campaign in 2012 was Bone Wars, which increased traffic to BHL by 145% over non-campaign periods.

See past campaign evaluation in this document:
https://docs.google.com/document/d/1fafX5YaHlkaKiJQk1RapJaC35WKh1U12Z0tzukI3zhU/edit?usp=sharing

## Organizing Campaigns

A Campaign Organization and Evaluation spreadsheet has been developed to help plan and evaluate campaigns. These spreadsheets are stored in the biodiversitylibrary@gmail.com Google Drive, in the folder "Campaign Planning and

Evaluation." Each year, a copy of the previous year's Planning and Evaluation spreadsheet will be made, renamed with the current year. All "red" fields in the evaluation tab and all campaign details from the previous year on each month tab will be cleared, and the January-December average weekly non-Campaign numbers from the past year will be added to the evaluation tab in the appropriate columns.

The new spreadsheet will then serve as the planning document for that year's campaigns. At a minimum, there will be four campaigns per year, structured around the four iTunes U collections planned. More campaigns may be planned for other months, but no more than one campaign per month is recommended.

Thus, there are two types of campaigns: iTunes U Campaigns and non-iTunes U Campaigns.

The BHL Technician is responsible for the overall organization and execution of campaigns. However, iTunes U related campaigns will have significant contributions from the Collections Coordinator and Collections Committee.

Campaigns contain the following elements:
(Note: During campaign weeks, the typical social media schedule and post types on Twitter, Facebook, and Blog are overridden by dates, post types, and times listed below)

- **Blog Post**
  - One blog post, typically that week's Book of the Week post, will be written for each campaign
  - To publish at 10am on post publication day
  - Links to the BHL, iTunes U, and Flickr Collections, as applicable, should be included in the blog post
- **Tweets**
  - Two content-related tweets per day, publishing at 11am and 3pm
  - Four tweets advertising the blog post, two to publish the day of post publication, two after. These posts should publication at 10am and 1pm on the days they publish.
  - Four Pinterest automatic tweets per day, highlighting pins related to the campaign. Two to publish each day at 8am, two each day at 2pm.
  - Tweets highlighting the Flickr, BHL and iTunes U collections, as applicable. To publish various days of the campaign week, at 12pm each day published
- **Facebook Posts**
  - Three content-related Facebook posts per week, to publish at 10am each day

- ○ One post highlighting the blog post, to publish at 10am on blog post publication day
- ○ One post highlighting the BHL, iTunes U, and Flickr collections, as applicable, to publish 10am on day not assigned to above Facebook posts
- **Pinterest**
  - ○ During week of campaign, images pinned to Pinterest should relate to the campaign. Each day, four images will be pinned. Two at 8am, two at 2pm. Automatic tweets should be sent out for these pins.
- **Flickr Collection**
  - ○ Typically, each campaign should have a Flickr collection, unless books related to that topic do not contain images. The Flickr collection should include images from the books in the BHL and iTunes U collections, if applicable, and the images from the book featured in the blog post. The Flickr collection should be completed the Friday before the campaign starts.
- **BHL Collection**
  - ○ Typically, each campaign should have a BHL collection, although it is not required. They may contain as many books as desired. The BHL collection should be made the featured collection on the Monday of the campaign, and should be completed the Monday before the campaign.
- **iTunes U Collection**
  - ○ iTunes U campaigns will always have iTunes U collections. They should contain no less than 6 books, no more than 35. These collections may be the same as the BHL collection, or a separate collection, if the organizer wishes to create a collection with more than 35 books for BHL, and then choose select books for the iTunes U collection. The iTunes U collection in BHL should be completed the Monday before the campaign. It should be published in iTunes U the Friday before the campaign.
- **Artwork for BHL and iTunes U Collections**
  - ○ The BHL and iTunes U collections require artwork. The templates for this artwork can be found on this wiki page: https://bhl.wikispaces.com/iTunesU. This artwork should be completed the Monday before the campaign and sent to the Collections Coordinator for use in the collection creation process.
- **Collaborations**
  - ○ The goal of campaigns is to get the content exposed to as many people as possible. Thus, getting as many outside entities to share the posts as possible is desired. BHL utilizes collaborations to this effect, attempting to get BHL member institutions and outside entities to share campaigns related to them. The BHL Technician will approach any entities identified in the campaign planning document before the campaign to request

collaborations.

- **Hashtags and Handles**
  - To further ensure that the maximum people possible view campaign posts, hashtags and handles related to the topic should be included in all Tweets and Facebook posts possible. Potential hashtags and handles are identified in the campaign planning document.
- **Calendar**
  - All aspects of the campaign are documented on the BHL Editorial calendar. The campaign itself should be added to the calendar, lasting the entire week of the campaign (The Collections Coordinator will add iTunes U campaigns to the calendar; the BHL Technician will add non-iTunes U campaigns to the calendar). The blog post appointment for that week should also be updated to reflect the campaign blog post. Finally, due dates for the elements outlined within the campaign planning document should be added to the calendar by the BHL Technician, and shared with those people responsible for completing the task.
- **Archive**
  - All tweets and Facebook posts for each campaign should be archived in the [biodiversitylibrary@gmail.com](mailto:biodiversitylibrary@gmail.com) account drive, in the Campaigns\Archives Folder the Monday after the campaign. Within this folder, a new folder should be created for each campaign. The BHL technician will archive each campaign.
    - Twitter: At the beginning of each campaign, the BHL Technician should create a new archive in Hootsuite for "[campaign keyword] @BioDivLibrary". At the end of each campaign, he can download that archive and save it to the appropriate google drive folder. If an archive cannot be created, the Technician can see if he can simply download all tweets with the campaign keyword added as a tag and save those in the archive. If not, as a final resort, the Technician can download the @BioDivLibrary archive and save only those tweets sent during the campaign week.
    - Facebook: To archive Facebook, the Technician should download the Facebook Insights for the week of the campaign, selecting "post level data" during the download process. These will be archived in the appropriate google drive folder.

Below are the specified required tasks and timelines for each campaign type.

## iTunes U Campaigns

Ideally, all iTunes U campaigns will have interns to work on them. If no interns are available for an iTunes U campaign, the BHL Technician is responsible for completing the tasks assigned to the intern in this section.

Below is the checklist in chronological order of what will occur for iTunes U Campaigns, with responsible parties. Assumes interns available.

- April-May: Collections Coordinator contact BHL Program Director and Program Manager to see if there are any topics that need to be covered via campaigns
- April-May: Collections Coordinator host Collections Committee call(s) to determine topics for four iTunes U collections and campaigns for the next year (time frame summer-summer), as well as dates for campaigns
  - Any topics indicated by Program Director/Manager should be included
  - Committee should consult calendar for upcoming events to focus on
  - BHL Technician should participate in these calls to suggest topics
- Collections Coordinator fills out Campaign Title, Dates and Description on campaign planning document for the months the campaigns were identified for
- Collections Coordinator adds campaign appointments to BHL Editorial Calendar
- Collections Coordinator alerts BHL Technician that campaigns available in planning document and calendar
- BHL Technician fills in responsible parties and due dates for elements in planning document
  - "Intern" should be added as responsible party for:
    - Content Tweets
    - Blog Tweets
    - Blog Post
      - BHL Technician should input due date for blog post as either regular Thursday of that week, or, if he knows blog post should publish alternate date that week, input that publication date into the planning document
    - Keyword
    - Content Facebook Posts
      - Publication dates to be filled in by intern
    - Blog Facebook Post
      - Publication dates to be filled in by intern
    - BHL and iTunes U artwork (Due Dates Monday before campaign)
    - Flickr Collection if desired (most likely this will be the responsibility of the BHL Technician) (Due Date Friday before campaign)
  - Collections Coordinator should be responsible party for:
    - BHL Collection (Due Date Monday before campaign)
    - Person responsible for making collection featured collection (Due

Date Monday of campaign)
- iTunes U Collection (Due Date Monday before campaign)
- Publishing iTunes U Collection (Friday before campaign)
- BHL Technician should be responsible party for:
  - Collection Tweets
  - Collection Facebook post
    - Publication date to be filled in by BHL Technician after intern enters other post due dates
  - Flickr Collection (unless designated to intern) (Due Friday before campaign)
    - Include uploading blog book to Flickr and adding to Campaign and Book of the Week collections
    - Should include images from books in collections
  - Pinterest
  - Person responsible for contacting collaborators
  - Archiving (Due Monday after campaign)
- The BHL Technician should add Due Dates, and share with responsible parties, to BHL Editorial Calendar for:
  - BHL Collection
  - Make BHL Featured Collection
  - iTunes U Collection
  - Publish iTunes U Collection
  - Flickr Collection
  - Artwork
  - Archive
    - If the BHL Technician knows the blog post will publish a day other than Thursday, he should move the standing blog post appointment to the appropriate date
- Once the intern comes, they will:
  - Choose and Input campaign keyword to planning document
  - Write blog post
    - Sending appointment for blog post to BHL calendar. Program Manager will merge existing blog post appointment and intern appointment
    - Add blog permalink URL to planning document
    - Add blog post book to BHL Book of the Week Collection
    - Add campaign keyword as tag to blog post
    - Add "book of the week" tag to blog post
    - Add book from blog post to Books Used section
    - Upload images to Flickr and add to Book of the Week and Campaign Collection

- - - Must create campaign collection first
      - If not granted Flickr admin access, contact the BHL Technician to upload blog post book images to Flickr
    - Compose Facebook Posts
      - Adding dates for post publications
      - Blog FB post to link to blog permalink URL
      - Sending to BHL Technician for publication if not granted Facebook admin access
    - Compose content and blog tweets
      - Blog tweets to link to permalink blog URL
      - Add campaign keyword to each tweet as a Hootsuite tag
      - Compose via BHL Hootsuite account
      - Collections Coordinator to approve tweets for publication
    - Create Flickr collection and upload appropriate images, if assigned (likely assigned to BHL Technician)
    - Create artwork for BHL and iTunes U collections and send to Collections Coordinator
    - Identify and Input hashtags and handles into all Facebook and Tweets
      - Add hashtags and handles to planning document
    - Identify possible collaborators and add to planning document
    - Add all books used during content creation process to "Books Used" section in campaign planning document
    - Collections Coordinator responsible for overseeing all intern work, granting and revoking access to necessary platforms as required
- Once the intern has completed all tasks, the Collections Coordinator will alert the BHL Technician that the content is ready
- By Due Date indicated, Collections Coordinator will lead Collections Committee call(s) to choose books for BHL and iTunes U collections (referring to books used by intern, as indicated in campaign planning document) and official description language
- The Collections Coordinator will then create the iTunes U and BHL collections in BHL, input books used in planning document, and collection links in planning document, by Monday before campaign
- The Collections Coordinator will alert the BHL Technician that the collections are ready
- The BHL Technician will upload images from books in collection, other books indicated as used during campaign, and any additional related books' images, to Flickr, creating Flickr Collection by Friday before campaign
    - This includes uploading blog post book images
    - Will add Flickr collection link to planning document
    - Add any books added to Flickr not in Books Used section of planning

document to that section
- Collections Coordinator will publish iTunes U collection in iTunes U and add link to planning document on Friday before campaign
- BHL Technician will compose collection tweets
- BHL Technician will compose Facebook collection post
  - Set to publish on day other FB posts not publish on, as indicated in planning document
  - Input publication date in planning document
- BHL Technician will add collection links to intern blog post
- BHL Technician will contact possible collaborators before campaign starts
- Collections Coordinator will set BHL collection to featured collection in BHL on Monday of campaign
- BHL Technician will archive tweets and Facebook posts Monday after campaign
- BHL Technician will fill out evaluation section for the campaign

## non-iTunes U Campaigns

Below is the checklist in chronological order of what will occur for non-iTunes U Campaigns, with responsible parties. Assumes interns not available. If interns are available for non-iTunes U campaigns, the intern will be responsible for the same tasks (with same due dates) as indicated above in the iTunes U Campaigns section.

This planning should occur after the iTunes U campaigns are identified, and should not be planned for months the iTunes U campaigns will occur in.

- BHL Technician contacts BHL Program Director to see if there are any topics that need to be covered via campaigns
- BHL Technician and Program Manager meet to determine campaign topics and months
  - Any topics indicated by Program Director should be included
  - Should consult calendar for upcoming events to focus on
  - Should not include topics in months covered by iTunes U campaigns
- BHL Technician fills out Campaign Title, Dates and Description on campaign planning document for the months the campaigns were identified for
- BHL Technician adds campaign appointments to BHL Editorial Calendar
- BHL Technician fills in responsible parties and due dates for elements in planning document
  - Collections Coordinator should be responsible party for:
    - BHL Collection (Due Date Monday before campaign)
    - Person responsible for making collection featured collection (Due

Date Monday of campaign)

- Note: Not all non-iTunes U campaigns need to have collections, but it is best if they do. If no BHL Collection is planned, that section of the planning document will remain blank, and this assignment will not be made
  - BHL Technician should be responsible party for:
    - Content Tweets
    - Blog Tweets
    - Collection Tweets
    - Blog Post
      - BHL Technician should input due date for blog post as either regular Thursday of that week, or, if he knows blog post should publish alternate date that week, input that publication date into the planning document
    - Keyword
    - Content Facebook Posts
      - Publication dates to be filled in by Technician
    - Blog Facebook Post
      - Publication dates to be filled in by Technician
    - Collection Facebook post
      - Publication date to be filled in by BHL Technician
    - BHL and iTunes U artwork (Due Dates Monday before campaign)
    - Flickr Collection (Due Date Friday before campaign)
      - Include uploading blog book to Flickr and adding to Campaign and Book of the Week collections
      - Should include images from books in collections
    - Pinterest
    - Person responsible for contacting collaborators
    - Archiving (Due Monday after campaign)
- The BHL Technician should add Due Dates, and share with responsible parties, to BHL Editorial Calendar for:
  - BHL Collection
  - Make BHL Featured Collection
  - Flickr Collection
  - Artwork
  - Archive
    - If the BHL Technician knows the blog post will publish a day other than Thursday, he should move the standing blog post appointment to the appropriate date
- The BHL Technician will then:
  - Choose and Input campaign keyword to planning document

- ○ Write blog post
  - ■ Ensuring blog post properly documented on Editorial Calendar
  - ■ Add blog permalink URL to planning document
  - ■ Add blog post book to BHL Book of the Week Collection
  - ■ Add campaign keyword as tag to blog post
  - ■ Add "book of the week" tag to blog post
  - ■ Add book to Books Used section of planning document
  - ■ Upload images to Flickr and add to Book of the Week and Campaign Collection
    - ● Must create campaign collection first (see below)
- ○ Compose Facebook Posts
  - ■ Adding dates for post publications
  - ■ Blog FB post to link to blog permalink URL
- ○ Compose tweets
  - ■ Blog tweets to link to permalink blog URL
  - ■ Add campaign keyword to each tweet as a Hootsuite tag
- ○ Create artwork for BHL and iTunes U collections and send to Collections Coordinator
- ○ Identify and Input hashtags and handles into all Facebook and Tweets
  - ■ Add hashtags and handles to planning document
- ○ Identify possible collaborators and add to planning document
- ○ Add all books used during content creation process to "Books Used" section in campaign planning document
- By Due Date indicated, Collections Coordinator will lead Collections Committee call(s) to choose books for BHL collection (referring to books used by Technician, as indicated in campaign planning document) and official description language
- The Collections Coordinator will then create the BHL collection in BHL, input books used in planning document, and collection link in planning document, by Monday before campaign
- The Collections Coordinator will alert the BHL Technician that the collection is ready
- The BHL Technician will upload images from books in collection, other books indicated as used during campaign, and any additional desired related books' images, to Flickr, creating Flickr Collection by Friday before campaign
  - ○ This includes uploading blog post book images
  - ○ Will add Flickr collection link to planning document
  - ○ Add any books added to Flickr not in Books Used section of planning document to that section
- BHL Technician will compose collection tweets
- BHL Technician will compose Facebook collection post
  - ○ Set to publish on day other FB posts not publish on, as indicated in planning

document
- ○ Input publication date in planning document
- BHL Technician will add collection links to blog post
- BHL Technician will contact possible collaborators before campaign starts
- Collections Coordinator will set BHL collection to featured collection in BHL on Monday of campaign
- BHL Technician will archive tweets and Facebook posts Monday after campaign
- BHL Technician will fill out evaluation section for the campaign

## Evaluating Campaigns

- Each campaign should be evaluated using the Evaluation tab in the planning document. The Technician is responsible for evaluations. To evaluate each campaign, the technician will simply input the indicated numbers in all "red" fields for that campaign month. The spreadsheet will automatically make the calculations to determine the campaign's performance.
  - ○ Note: Even on months without campaigns, the Technician must still populate the "Total Weeks per Month," Total and By Platform Social Referrals per month, and the total for month audience growth stats, as all months pull the figures from these fields for evaluations. The campaign-related red fields MUST BE LEFT BLANK if there is no campaign. iTunes U fields MUST BE LEFT BLANK if there is no iTunes U collection for that month's campaign.
  - ○ Note: Because the main goals of the campaigns have been identified as increasing the BHL audience and traffic back to BHL, the metrics used to evaluate campaigns are limited to how well they drive traffic back to BHL and how well they grow the social media audiences. It may be that a campaign does a good job increasing interactions on the platforms themselves, but these interactions are not converting to traffic to BHL. Thus, the overall performance of the campaign will be relatively poor compared to the platform interaction stats. If campaigns are consistently performing poorly, it is worthwhile to perhaps do some evaluations of the platforms themselves to see if engagements stats increase during the campaigns. If so, then the BHL Technician must consider new ways to convert that engagement to visits to BHL, or consider altering the metrics kept for the campaigns (this requires altering the overall goals articulated for the campaigns to include increasing engagement on platforms).
  - ○ Note: BHL Technician should also pay attention to whether the most successful campaigns involved collaborations. There is a section on the evaluation document in which he can report on this.

○ Note: Dips in campaign performance during summer months should be expected, as all BHL performance decreases starting in late April through July. Thus, it eventually might be worthwhile to consider not hosting campaigns in the summer. Alternatively, staff could decide to host campaigns in the summer specifically to try to improve decreasing summer platform performance.

**To gather statistics for the Campaign Evaluation spreadsheet** (https://docs.google.com/document/d/1fafX5YaHlkaKiJQk1RapJaC35WKh1U12Z0tzukI3zhU/edit?usp=sharing ), use the:
- BHL Monthly Reporting document (https://docs.google.com/spreadsheet/ccc?key=0Ak0hDkSQMhfDdDRueG91c0d4bXZvcUVZUUxvSDJCOEE#gid=0 ) and
- Google Analytics for the website (https://www.google.com/analytics/web/?hl=en&pli=1#report/visitors-overview/a3353213w6317656p6531424/ ) and
- Google Analytics for the blog (https://www.google.com/analytics/web/?hl=en&pli=1#report/visitors-overview/a3353213w6317709p6531480/%3F_.advseg%3D/).

Collaborations in this context refers to either our requests of other BHL partner institutions or outside entities to reshare BHL social media content via their social media outlets, or external entity requests to re-share content via BHL social media content. It also refers to several relationships BHL currently engages in whereby BHL staff provide regular content to external entities to post via their social media platforms.

Collaborations may also refer to the mention of external entity handles within BHL posted social media. BHL Staff should include mention of other entities related to content being posted whenever possible in order to secure as much reach for published material as possible.

Responsible Parties

**Program Manager**
- Responsibilities:
  - Include handles for outside entities, including BHL member institutions, within content composed whenever possible
  - Serve as outside contact for collaboration requests and coordinate collaboration requests as required
    - Forward requests for collaborations on platforms Program Manager is not responsible for to person responsible for that platform
    - Meet with affected parties to discuss requests for continuing collaborations
  - Perform collaborations related to platforms for which the Program Manager is responsible for (unless designed to BHL Technician)
  - Add "collaboration" tag to tweets and blog posts involving collaborations
  - Review collaboration success in relation to top posts during bi-annual review
  - Set up archive for "collaboration" tag in Hootsuite

**BHL Technician**
- Responsibilities:
  - Include handles for outside entities, including BHL member institutions, within content composed whenever possible
  - Weekly EOL and NMNH collaborations
  - Campaign collaborations

- ■ cc Program Manager on collaboration requests
  - ○ Perform collaborations related to platforms for which the Technician is responsible for
  - ○ Coordinate collaboration requests with Program Manager as required
    - ■ Forward requests for collaborations on platforms Technician is not responsible for to person responsible for that platform, cc'ing Program Manager on communication
    - ■ Meet with Program Manager to discuss requests for continuing collaboration, if receive request or affected party
  - ○ Add "collaboration" tag to tweets and blog post involving collaboration
  - ○ Review collaboration success in relation to campaigns

**Collections Coordinator**
- ● Responsibilities:
  - ○ Include handles for outside entities, including BHL member institutions, within content composed whenever possible
  - ○ Perform collaborations related to platforms for which the Collections Coordinator is responsible for
  - ○ Add "collaboration" tag to tweets and blog posts involving collaborations

Details

**Success of Collaborations to Date**

Collaborations are a very successful means of promoting BHL content beyond the existing BHL audiences. By having other entities post BHL content, we ensure that those entities' audiences will be exposed to BHL, when they otherwise might not have seen the content. Furthermore, when we include handles in Twitter or Facebook for other entities within our posts, our content will be displayed on that entity's Facebook page or for people following that entity on Twitter.

A review of the top ten posts on Twitter, Facebook, and the blog for the past year (July 2012-June 2013) indicates that collaborations are very successful for BHL.
- ● The top two tweets were part of BHL's standing EOL/NMNH collaborative arrangement (see below)
- ● One of the top Facebook posts involved a collaboration
- ● Two of the top blog posts involved a collaboration

Furthermore, four of the top ten tweets in total were retweeted by external entities, proving that, particularly for Twitter, collaborations are key to platform success. As Twitter is the least successful performer of our three top platforms (Flickr, Facebook, Twitter),

collaborations should particularly be employed as much as possible on this platform to ensured increased success.

**Active vs Passive Collaboration**

There are two categories of collaboration: Active and Passive.

Active collaboration refers to situations where we actively contact other entities and request that they share our content. It also refers to other entities actively contacting us and requesting that we share their content. Standing collaborative relationships, where we regularly post or send content for publication via external outlets, are also active collaborative relationships.

Typically, the Program Manager or the BHL Technician will handle active collaboration. The Program Manager serves as the official contact for entities wishing to discuss collaborative arrangements. The BHL Technician is responsible for standing collaborative arrangements (EOL/NMNH) and campaign collaborations (see below). Typically, those responsible for posting via a specified platform are responsible for conducting the actual collaborations, and thus new requests for collaboration should be sent to those responsible for posting on those platforms. The Program Manager should be cc'd on all communication regarding collaborations, and any communication regarding collaborations should also be sent to any affected parties (i.e. others regularly posting on a platform on which a collaboration will occur). The Program Manager and Technician will meet to discuss the practicality of pursuing new standing collaborative arrangements.

Passive collaborations refer to those instances where a handle for a BHL member institution or outside entity, or an existing hashtag, is included in a tweet or Facebook post published by BHL as the post author recognizes a tie with the content and that entity. However, that entity is not actively contacted with a request to share the content via their own outlet. Passive collaboration activities do not need to be communicated to other BHL staff. Any BHL staffer composing content for BHL social media should try to include handles or hashtags of other entities as often as possible, to increase the potential audience seeing the content. However, it is not necessary to contact these entities every time this occurs, unless the post represents something strongly related to that entity (like blog post featuring a staffer at their institution or entire BHL collection created from books from this institution). In the latter cases, it may be worthwhile to contact the institution and request that they share the BHL post. If entities are contacted, it becomes active collaboration, and the guidelines above apply.

Each collaborative post should link to BHL material, a BHL Flickr collection, or BHL blog post. Where possible, when being published via non-BHL outlets, they should include the

@BioDivLibrary (Twitter) or @BiodiversityHeritageLibrary (Facebook) handles.

<u>Types of Collaborations</u>

- **EOL/NMNH**: On a weekly basis, the BHL Technician provides BHL content to NMNH and the Encyclopedia of Life for posting on Facebook and Twitter
    - EOL Twitter: The BHL Technician has postings permission to the EOL Hootsuite account and will publish 3 retweets per week of BHL tweets through EOL. These tweets, as retweets, should include the @BioDivLibrary handle and incorporate, if possible, new links to EOL material related to the topic (i.e. "RT @BioDivLibrary: Smallest canid species in world weighs less than average textbook ow.ly/moQLN >> In EOL ow.ly/moQJ2)
    - EOL Facebook: The BHL Technician has posting permission to the EOL Facebook page and every Monday at 3pm will publish a Facebook post highlighting BHL material to the EOL Facebook page. This Facebook post should include the @BiodiversityHeritageLibrary Facebook handle.
    - NMNH: On a weekly basis, the BHL Technician will send Rosemari Ochoa (OchoaR@si.edu) content, structured as either tweets or Facebook posts, for publication via the NMNH outlets. Posts should be structured to include the @BioDivLibrary and @BiodiversityHeritageLibrary handles.
- **Campaign Collaborations**: As part of the campaign planning process, possible collaborators, either BHL Members or outside entities, will be identified (see campaigns section). The BHL Technician should contact the representatives at these institutions to alert them to campaigns and request post sharing, cc'ing the Program Manager on the communication. Known social media contacts at BHL Member institutions are provided below. If the contact is not known, the BHL Technician should try to find a contact to get in touch with regarding campaigns.
- **Contact for Collaboration Requests**: The Program Manager will serve as the contact for collaboration requests. If an outside entity expresses interest in collaborating with BHL via social media, they should be given the Program Manager's contact information
    - If the collaboration involves an outlet that the Program Manager is responsible for (blog, Twitter non-content posts), then the Program Manager should perform the collaboration but cc affected parties (i.e. BHL Technician and Collections Coordinator if on Twitter)
    - If the collaboration involves an outlet that the Program Manager is not responsible for (i.e. Facebook, Twitter content posts), then she should forward the request to the person responsible for posting via that outlet
- **BHL Technician Receipt of Requests for 1-time Collaborations**: If the BHL

Technician, as a contact for many collaborations, receives a request to retweet, repost, or otherwise collaborate with an outside party, and the collaboration involves an outlet he is responsible for, he may go ahead and perform the collaboration if deemed appropriate.

- CC affected parties (i.e. others posting on that platform) and the Program Manager regarding any collaborations
- If the BHL Technician receives a request for collaboration on a platform he is not responsible for, he should forward the request to the party responsible for that platform and cc the Program Manager in the communication, if not already the target of the communication

● **Requests for Continuing Collaborations**: If either the BHL Technician or Program Manager receives a request to initiate an ongoing collaboration, the Program Manager should meet with the affected parties (those who will perform the collaborations) to decide whether capacity exists to maintain these ongoing collaborations. If so, a BHL staff member will be assigned to the collaboration and is responsible for maintaining the content and relationship

- If it is decided that an ongoing collaboration cannot be maintained, a 1-time collaboration will be suggested, performed by the person responsible for posting on the desired platform.

● **Regular Passive Collaborations**: Whenever possible, any BHL staff member posting via social media should attempt to include relevant handles (either for BHL member institutions or outside entities) within posts. It is each posting person's responsibility to include these in posts. It is not necessary to contact other staff members, or the entities being mentioned in the posts, about these passive collaborations, unless the post represents something strongly related to that entity (like blog post featuring a staffer at their institution or entire BHL collection created from books from this institution). In the latter cases, it may be worthwhile to contact the institution and request that they share the BHL post.

**BHL Member Institution Social Media Contacts**
- California Academy of Sciences: Aime Wong (awong@calacademy.org) or Vi Zahajszky (vzahajszky@calacademy.org)
- The New York Botanical Garden: Ann Rafalko (arafalko@nybg.org)
- Missouri Botanical Garden: John Dedeke (john.dedeke@mobot.org)
- Academy of Natural Sciences: Michael Servedio (ms3733@drexel.edu)
- American Museum of Natural History: Jessica Ulrich (julrich@amnh.org)

Goals

● **Outreach Goal One: Increase awareness about BHL and grow our audience.**

- **Outreach Goal Two: Keep people informed about project developments, services, and how to use them.**
- **Outreach Goal Three: Raise awareness and foster dialogue within BHL audiences about biodiversity topics and corpus publications using BHL collections.**
- **Outreach Goal Four: Increase traffic back to BHL from Social Media**

Collaborations speak to all of the goals articulated for BHL outreach. By increasing the potential audiences viewing BHL content by sharing them via external platforms or including external handles and hashtags, we ensure that we increase awareness about BHL, grow our audience, make more people aware of project developments, raise awareness about biodiversity topics, and ultimately increase traffic back to BHL.

Increased traffic back to BHL will be captured in the overall stats for increased traffic to BHL from various social media platforms.

The most meaningful practical evaluation of collaboration activities involves determining whether collaborations play a role in the most popular posts and campaigns for BHL.

Thus, as part of the bi-annual evaluation, the Program Manager ascertains the most popular posts over the past six months on Twitter, Facebook, and the Blog. As part of that exercise, the Program Manager is instructed to then determine if collaborations played a part in those most popular posts.

Similarly, the BHL Technician evaluates the performance of BHL publicity campaigns. The Technician is also instructed to determine whether collaborations played a role in the most popular campaigns.

To date, as described, collaborations have played a significant part in the most popular posts, thus validating their continued use. If this should stop being the case, the Program Manager will need to evaluate whether collaborations should decrease, perhaps going to only passive collaborations (as these require little effort), or cease completely.

**Measuring Effectiveness of Individual Collaborative Posts**

It is very difficult to measure the effectiveness of individual collaboration posts in comparison to non-collaborative posts at this time unless done as the collaborations happen, which is not efficient and is very time consuming.

Currently, there is no way to download all tweets sent out through Hootsuite with click numbers associated. A user can download a report of the clicks each day, but even if the

staff member knows each day a collaboration occurred, there is no way to determine which of those clicks that day related to only the collaboration post. The user would have to manually set the report for a day at a time to determine each post performance within the "top ten posts" in order to get individual tweet performance. This is obviously not effective.

While you can download up to six months' worth of Facebook posts from Facebook, with individual post performance associated, there is no way to add tags to institution pages (which is what BHL is) in Facebook, so a staff member would have to manually go through each post within the report to highlight the collaboration posts, pull those out of the report, and then compare them to non-collaboration posts. Again, this is not an effective method, and would require the staff member to keep track of the actual days collaborations happened. If desired, BHL could document each collaborative event on the calendar, though this is likely not a practical endeavor.

It would be fairly simple to evaluate individual blog posts from collaborative events to non-collaborative events, as long as a common keyword was employed among all collaborative blog posts. The staff member would simply have to filter out all blog posts with that keyword, identify each one's post performance, and then compare that to non collaborative posts. Simple, but time consuming.

It is possible that in the future, Hootsuite will implement a method to download all tweets with click information, and Facebook will soon update their Insights page, possibly making it easier to evaluate individual post performance. Thus, in the future it may be easier to evaluate individual collaborative post performance, should it be desired.

There is no way to effectively measure the success of posts published via external parties, as we do not have access to their analytics. BHL staff could request reports from external parties, though the same limitations mentioned here would also apply to those requests. Thus, it is best to simply anecdotally keep an eye on posts publishing via external outlets to see retweets and likes. If those numbers appear to continually decline, it may be time to revisit those collaborative relationships, if they represent ongoing activities.

In short, as the originally-outlined evaluation (under goals) is currently more than sufficient to validate continued use of collaborations, individual post analysis is not recommended. Should situations mentioned above make it easier to conduct individual post analysis, and deeper analysis is desired or required, this evaluation could be implemented.

**Archiving Collaborative Posts**

In order to try to label collaborative posts as such, so that in the future, should updates be

made that will make individual post analysis easier, a "collaboration" keyword should be implemented at this time. The tag "collaboration" should be added to all blog posts involving collaborations, and the Hootsuite tag "collaboration" should be added to all Tweets involving collaborations. Thus, in the future, a report of all collaboration tweets and blog posts can be obtained.

Currently, as mentioned, there is no way to add tags to Facebook posts for institution pages. If this feature becomes available, "collaboration" should be added to appropriate Facebook posts as well.

The Program Manager should contact Brian Alpert (alpertb@si.edu) to request that a Hootsuite archive be set up for "collaboration @BioDivLibrary." This will ensure that all collaboration tweets with the "collaboration" keyword are archived for future reference.

# EVALUATION

## Responsible Parties

**Program Manager**
- Responsibilities:
    - Bi-Annual Evaluations
    - Creating new Evaluation spreadsheets for each year
    - Contacting responsible parties for platform adjustments if necessary, based on evaluations

## Details

On a bi-annual basis, the Program Manager will perform an evaluation of outreach progress. This evaluation will be conducted using the Outreach Evaluation spreadsheet for the proper year, stored in the biodiversitylibrary@gmail.com google drive, folder "Outreach and Communication Plan".

The first yearly evaluation will occur in early July, capturing progress for January - June of that year. The second will occur in early January following the year being evaluated, capturing progress for July-December of the previous year.

Each platform listed above has goals associated with the metrics outlined for each outreach goal articulated. The evaluation document determines whether BHL is meeting those goals. As the Program Manager conducts the evaluation, she will make notes about the progress and suggest any necessary adjustments to outreach activities in order to ensure realization of goals.

Many metrics gathered for each platform may support more than one outreach goal. The outreach goals each metric supports are articulated below, but these metrics are only gathered once in the evaluation spreadsheet. Furthermore, many of these metrics are also gathered on a monthly basis in the Monthly BHL Reporting Document. The Program Manager may use these figures when calculating bi-annual progress.

NOTE: BHL experiences regular decreases in all outreach and website stats during summer months, starting in April going through July/August. This speaks to the BHL

audience being largely academic. This is why it is important to evaluate outreach progress on a many-month basis, to evaluate trends and overall progress towards goals rather than individual monthly performance alone.

## Preparing the Evaluation Spreadsheet Each Year

Each year, the Program Manager should make a copy of the previous year's evaluation spreadsheet, removing any non-formula figures from the new spreadsheet and updating it to reflect the proper year. Goals should be adjusted and input in the new spreadsheet following the "Setting Goals" guidelines below. The "Last Year" figures should be updated by capturing the "Total for this Year" numbers from the previous year's spreadsheet and inputting those figures as "Last Year" figures on the new spreadsheet.

New spreadsheets should be stored in the biodiversitylibrary@gmail.com google drive, folder "Outreach and Communication Plan"\"Outreach Evaluation."

## Setting Goals

Goals reflect the percentage by which BHL hopes to increase the figure from the previous year for each category. So, if BHL had 100 visits to a platform last year, and the goal for this year is 30%, BHL hopes to realize 130 visits to that platform this year. Goals may also reflect simply the total number BHL hopes to realize in a year, without comparison to last year. The spreadsheet will articulate which instance is being used for each calculation.

2013 goals with percentages were calculated by taking the percentage increase that Jan-June 2013 represents over Jan-June 2012. Future goals should be set by taking the percentage increase of 2013 over 2012 calculated in 2013 for each category and applying for the next year, with slight increases if appropriate.

2013 non-percentage goals were calculated by determining the number realized for each unit in 2012 and applying that as the goal for 2013. Future non-percentage goals should be determined by taking the number realized in each previous year and inputting that as the current year goal.

## Determining Progress Towards Goals

To determine if BHL is on target to meet its goals, "Yearly Progress Towards Goal" figures for each metric should be at least 50% by the end of Evaluation One period. If it is not, use the comments section to recommend adjustments and contact responsible parties to

suggest changes.

## Goals and Metrics by Platform

Below are the four BHL outreach goals, each metric by platform that supports those goals, and the yearly goal for each metric.

## Outreach Goal One: Increase awareness about BHL and grow our audience.

**Public Wiki**
- Visits: Google Analytics has been deployed for the public wiki. Knowing how well it keeps people informed about project updates and increases awareness of BHL is related to how much it is used. This is revealed through visits and unique visitors.
    - Goal: 9,800 total for 2013
    - Tracked bi-annually
- Unique Visitors: Google Analytics, see above
    - Goal: 7,455 total for 2013
    - Tracked bi-annually
- Most Popular Pages: Google Analytics will show the most popular pages on a website. This will be useful for BHL staff, as they will know the most important and effective pages to keep updated.
    - Tracked bi-annually

**Swag**
- Total swag in each category ordered per year
    - Tracked bi-annually
- Total swag remaining in each category per year
    - Tracked bi-annually
- Total spent on swag per year
    - Tracked bi-annually

**iTunes U**
- Browses
    - Goal: 25,965 total for 2013
    - Tracked bi-annually
- Downloads
    - Goal: 22,625 total for 2013
    - Tracked bi-annually
- Subscriptions
    - Goal: 3,482 total for 2013
    - Tracked bi-annually

**Listservs**
- Number of Submissions to listservs: A form has been created to document each time a BHL staffer posts to a listserv.
    - Goal: 3 total for 2013
    - Tracked bi-annually

**Conferences**
- Number of BHL Staff posters/papers/presentations each year
    - Goal: increase by 30% over posters/papers/presentations last year
    - Tracked bi-annually

- At least 1 pan-BHL conference each year.
    - Goal: 1 total for 2013
    - Tracked bi-annually

**Pinterest**
- Pinned Images: The more images in Pinterest, the more likely people will find our content and interact with it. Thus, the number of images in Pinterest supports increasing BHL awareness.
    - Goal: 1,000 total for 2013
    - Tracked monthly and bi-annually
- Followers: These numbers indicate the people following us on Pinterest, and thus reflect our BHL Pinterest, and larger BHL, audience.
    - Goal: 15% increase over new Followers last year
    - Tracked monthly and bi-annually

**Flickr**
- Increasing images in Flickr: The more images, the more content for reuse and for users to discover.
    - Goal: 5,000 total for 2013
    - Tracked monthly and bi-annually
- Views on Content: Tracking the number of views our content gets reflects how aware people are of our content and demonstrates the BHL Flickr audience.
    - Goal: 30% increase over views last year
    - Tracked monthly and bi-annually
- Contacts: These numbers indicate the people following us on Flickr, essentially, and thus reflect our BHL Flickr, and larger BHL, audience.
    - Goal: 5% increase over new contacts last year
    - Tracked monthly and bi-annually
- Images with Tags: Tagging BHL Flickr images enables them to be shared and found more easily, thus making it more likely that people will find our content and be aware of BHL.
    - Goal: 1% increase over new images with tags last year
    - Tracked monthly and bi-annually

- - Images in EOL BHL Collection: A subset of this is how many of these tagged images are shared with EOL, further exposing BHL to new audiences.
    - Goal: 1% increase over new images added to EOL last year
    - Tracked monthly and bi-annually

**Twitter**
- Followers on Twitter: Measures not only how Twitter is increasing awareness about BHL (by tracking the number of people learning more about BHL through this platform), but also how our BHL audience is growing based on the number of people seeing our content through Twitter.
  - Goal: 12% increase over new followers last year
  - Tracked monthly and bi-annually
- Clicks on Links: Twitter links generally return users to BHL, thus reflect increased BHL audience.
  - Goal: 50% increase over clicks on links last year
  - Tracked monthly and bi-annually
- Number of Tweets: Tracks how often we share information with users, but most useful to see how post frequency affects interactions.
  - Goal: 1,250 total for 2013
  - Tracked monthly and bi-annually

**Facebook**
- Followers on Facebook: Measures not only how Facebook is increasing awareness about BHL (by tracking the number of people learning more about BHL through this platform), but also how our BHL audience is growing based on the number of people seeing our content through Facebook.
  - Goal: 40% increase over new followers last year
  - Tracked monthly and bi-annually
- Reach of Facebook Posts: Measures how many people are seeing our BHL Facebook content, thus being made potentially aware of BHL.
  - Goal: 40% increase over reach of posts last year
  - Tracked monthly and bi-annually
- Engagement: See goal three. Engagement includes number of people clicking on links in posts. These clicks usually lead back to BHL or BHL platforms, like the blog (except when they lead external news sites), so bringing people back to BHL through Facebook reflects audience and BHL awareness building.
  - Goal: 65% increase over engagement last year
  - Tracked monthly and bi-annually

**Blog**
- Traffic to BHL Blog: Measures how well the blog increases awareness about BHL by delivering information to audiences about our project and content.
  - Goal: 25% increase over visits to blog last year

- ○ Tracked monthly and bi-annually
- Visitors to Blog: Measures not only how the blog is increasing awareness about BHL (by tracking the number of people learning more about BHL through this platform), but also how our BHL audience is growing based on the number of people seeing our content through the blog.
  - ○ Goal: 30% increase over visitors to blog last year
  - ○ Tracked monthly and bi-annually
- Blog Pageviews: Measures not just the visits and visitors, but how many pages these visitors are looking at on our blog.
  - ○ Goal: 15% increase over blog pageviews last year
  - ○ Tracked monthly and bi-annually

**Outreach Goal Two: Keep people informed about project developments, services, and how to use them.**

**Public Wiki**
- Visits: Google Analytics has been deployed for the public wiki. Knowing how well it keeps people informed about project updates and increases awareness of BHL is related to how much it is used. This is revealed through visits and unique visitors.
  - ○ Goal: 9,800 total for 2013
  - ○ Tracked bi-annually
- Unique Visitors: Google Analytics, see above
  - ○ Goal: 74,55 total for 2013
  - ○ Tracked bi-annually
- Most Popular Pages: Google Analytics will show the most popular pages on a website. This will be useful for BHL staff, as they will know the most important and effective pages to keep updated.
  - ○ Tracked bi-annually
- Length: To determine how effective the public wiki is at communicating project information, it is useful to determine how long users stay on the public wiki.
  - ○ Goal Maximum: 4,459 total for 2013
  - ○ Goal Moderate: 63 total for 2013
  - ○ Goal Minimum: 5,278 total for 2013
  - ○ Tracked bi-annually

**Press Releases**
- Number of Press Releases published each year for BHL through SI or SIL
  - ○ Tracked bi-annually

**Quarterly Reports**
- Publish 4 reports each year
  - ○ Goal: 4 total for 2013

- - - Tracked bi-annually
**Newsletter**
- Publish 4 newsletters each year
  - Goal: 4 total for 2013
  - Tracked bi-annually
- Open rate of each email and average for year. This will show how many people are actually receiving project news updates via the newsletter.
  - Goal: 20% increase in average open rate for newsletters over last year
  - Tracked bi-annually
- Percentage clicks on links average for year. This will show how many people are engaged with the information provided in the newsletter.
  - Goal: 165% increase in average clicks on links for newsletters over last year
  - Tracked bi-annually

**Listservs**
- Number of Submissions to listservs: A form has been created to document each time a BHL staffer posts to a listserv.
  - Goal: 3 total for 2013
  - Tracked bi-annually

**Conferences**
- Number of BHL Staff posters/papers/presentations each year
  - Goal: increase by 30% over posters/papers/presentations last year
  - Tracked bi-annually
- At least 1 pan-BHL conference each year.
  - Goal: 1 total for 2013
  - Tracked bi-annually

**Twitter**
- Popular Tweets: For this goal staff want to know whether the project news and updates tweets are being interacted with by users. Thus, as part of the bi-annual evaluation, the BHL Program Manager will evaluate the performance of individual tweets to determine most successful content types. Special attention should be paid to whether news and update tweets are popular. If they are not, these tweets should still be sent out, but perhaps different hashtags or approaches to the tweets should be considered.
  - Tracked bi-annually

**Facebook**
- Popular Posts: For this goal staff want to know whether the project news and updates posts are being interacted with by users. Thus, as part of the bi-annual evaluation, the BHL Program Manager will evaluate the performance of individual posts to determine most successful content types. Special attention should be paid to whether news and update posts are popular. If they are not, these posts

should still be sent out, but perhaps different approaches to the posts should be considered.
- ○ Tracked bi-annually

**Blog**

- ● Popular Posts: For this goal staff want to know whether the project news and updates posts are being interacted with by users. Thus, as part of the bi-annual evaluation, the BHL Program Manager will evaluate the performance of individual posts to determine most successful content types. Special attention should be paid to whether news and update posts are popular. If they are not, these posts should still be sent out, but perhaps different approaches to the posts or publicizing them should be considered.
  - ○ Tracked bi-annually

## Outreach Goal Three: Raise awareness and foster dialogue within BHL audiences about biodiversity topics and corpus publications using BHL collections.

**Flickr**

- ● Images with Comments/Favorited/Notes: All of these metrics reflect interactions with our content, representing dialogues existing around our content.
  - ○ Goal Comments: 10% increase in number of new images with comments this year over last year
  - ○ Goal Favorited: 1% increase in number of favorited images this year over last year
  - ○ Goal Notes: 1% increase in number of images with notes this year over last year
  - ○ Tracked monthly and bi-annually
- ● Images with Tags: Adding species name tags to Flickr images raises awareness about species depicted in these images by having them more easily identified and shared with external websites about those species. When they are placed in the context of an EOL species page, there is even more opportunity for users to increase their awareness about a topic.
  - ■ Goal: 1% increase in new images with tags this year over last year
  - ■ Tracked monthly and bi-annually
  - ○ Thus, the number of images shared with EOL is also a metric to support this goal.
    - ■ Goal: 1% increase in new images added to EOL this year over last year
    - ■ Tracked monthly and bi-annually

**Twitter**

- Retweets/Mentions: Reflects both dialogue fostering and awareness building when our users interact with our content.
  - Goal: 50% increase in number of retweets/mentions this year over last year
  - Tracked monthly and bi-annually
- Clicks on Links: By clicking on links to our content, people will learn more about a subject via BHL material, thus increasing awareness. Also grows BHL audience (see goal one).
  - Goal: 50% increase in number of clicks on links this year over last year
  - Tracked monthly and bi-annually
- Popular Tweets: On a bi-annual basis, the BHL Program Manager will evaluate the performance of individual tweets to determine most successful content types. Future posting will be adjusted based on these findings.
  - Tracked bi-annually

**Facebook**

- People Interacting with Page: Tracks the number of people interacting with our Facebook posts. These interactions include comments, sharing, or liking posts. Comments and liking posts reflect forms of dialogue about topics. Sharing posts reflects increasing awareness about those topics through BHL, as sharing means all friends of the person who shared will also see the post.
  - Goal: 100% increase in number of people interacting with page this year over last year
  - Tracked monthly and bi-annually
- Interactions:  The number of comments, shares, and likes, reflecting dialogue and raised awareness as articulated above.
  - Goal: 100% increase in number of interactions this year over last year
  - Tracked monthly and bi-annually
- Engagement: This reflects the number of people commenting, sharing, liking, or clicking on links in Facebook posts. Commenting, sharing and liking support dialogue and awareness as already articulated. Clicking on links reflect raising awareness (and building audience - see goal one) about the topic via BHL content, as people will gain more information about a topic by viewing our BHL content.
  - Goal: 65% increase in engagement this year over last year
  - Tracked monthly and bi-annually
- Popular Posts: On a bi-annual basis, the BHL Program Manager will evaluate the performance of individual posts to determine most successful content types. Future posting will be adjusted based on these findings.
  - Tracked bi-annually

**Blog**

- Guest Blogging: A good measure of how well the blog is fostering dialogue about biodiversity or library topics and their relation to BHL. More guest blogs means more people are conversing about these topics using this platform.

- - Goal: 30 total for 2013
    - Tracked monthly and bi-annually
  - Blog Comments: While we typically get few comments to our blog, tracking comments posted reflects fostering dialogue.
    - Goal: 3% increase in number of new comments this year over last year
    - Tracked monthly and bi-annually
  - Popular Posts: On a bi-annual basis, the BHL Program Manager will evaluate the performance of individual posts to determine most successful content types. Future posting will be adjusted based on these findings.
    - Tracked bi-annually

**Collaborations**
- Popular posts: determining whether the most popular tweets, Facebook posts, blog posts, and campaigns involved collaborations indicates whether collaborations help raise awareness and foster dialogue related to BHL content
  - Tracked bi-annually

## Outreach Goal Four: Increase traffic back to BHL from Social Media

**Pinterest**
- Visitors to BHL from Pinterest: Measures how well Pinterest is helping us build our core BHL audience.
  - Goal: 100% increase in visits to BHL from Pinterest this year over last year
  - Tracked monthly and bi-annually

**Flickr**
- Visitors to BHL from Flickr: Measures how well Flickr is helping us build our core BHL audience.
  - Goal: 1% increase in visits to BHL from Flickr this year over last year
  - Tracked monthly and bi-annually

**Blog**
- Visitors to BHL from Blog: Measures how well the blog is helping us build our core BHL audience.
  - Goal: 5% increase in visits to BHL from Blog this year over last year
  - Tracked monthly and bi-annually

**Facebook**
- Visitors to BHL from Facebook: Measures how well Facebook is helping us build our core BHL audience.
  - Goal: 50% increase in visits to BHL from Facebook this year over last year
  - Tracked monthly and bi-annually

**Twitter**
- Visitors to BHL from Twitter: Measures how well Twitter is helping us build our core

BHL audience.
- ○ Goal: 20% increase in visits to BHL from Twitter this year over last year
- ○ Tracked monthly and bi-annually

## OUTREACH-LIGHT VERSION

The above plan represents the outreach plan for a best-case scenario with staffing. Assuming BHL has all of the resources and staff it needs, these are the activities BHL should partake in for outreach. However, circumstances are likely to result in less than ideal staffing and time available for outreach activities. If BHL is operating with limited staff, this section briefly outlines the suggested activities for BHL outreach.

Presented in this section is the rationale for what is recommended, based on current evaluations, as well as the types of posts or activities, responsible parties, and schedules for posting, if applicable, for those platforms for which changes are recommended. Details for each platform, including choosing content, platform guidelines, intern activities, etc., are the same as outlined above, and staff should refer to the full sections for each platform to find these details.

Evaluations will remain the same for all platforms, regardless of if BHL is operating on a "light" basis or not. However, the Program Manager may need to adjust the goals for each platform depending on the changes made to postings, as these may make the current goals (which are based on assuming BHL will participate in the full level of outreach activities as outlined above) may no longer be achievable at the "Outreach Light" level.

## TWITTER LIGHT

At the light level, the purpose of the BHL Twitter account should be re-evaluated. Currently, Twitter is both used for project news updates and to share content-related posts (i.e. Image of the Day, Species of the Day, Biodiversity News Daily tweets). In the outreach light version, staff should consider Twitter as more of a project news update platform, and less about also posting content-related posts.

Thus, the suggested Twitter change is to remove the three content-related daily posts (Species of the Day, Image of the Day, Biodiversity News) and instead post one tweet at 11am daily repurposing the Facebook post's content. Service tweets, project news tweets, and blog tweets will remain in place. Pinterest tweets will be limited to campaign weeks, unless 1 pin per day option enacted (see Pinterest Light section).

As the most popular posting times are 11am and 3pm, these are the posting times recommended to maintain in the light version. Collaborations are still suggested, as these significantly contribute to Twitter success, but collaboration types may change in the light version as well (see Collaborations section below).

## Responsible Parties

**BHL Program Manager**
- Responsibilities:
  - Project News Announcements; Weekly Developer Activities Techie Tweets; Services; Workflow (coordinating with other BHL librarians for content and pictures); Recent Additions; Conferences and Presentation Tweets; Links about BHL mentions on the web or in articles; Blog Tweets.
    - During campaign weeks, tweets will be managed by BHL Technician
    - Program Manager should share workflow-related content/images received with Technician for use on Facebook
  - Scheduling non-campaign related intern tweets if interns do not utilize Hootsuite
  - Downloading BHL Twitter archive on bi-annual basis and storing in S:ISD]BHL\BHL Directorate\Outreach and Communication\Twitter Archive
  - Statistics

**BHL Collections Coordinator**
- Responsibilities:
  - Monitor Twitter daily. Respond to comments to BHL and retweet other tweets when appropriate.
  - Follow appropriate users on Twitter
  - Permissions Tweets
  - Praise to Testimonials wiki
  - Review BHL intern tweets and set to publish
  - Maintain and update Twitter account password, if necessary
  - Change intern Hootsuite password after each intern leaves

**BHL Technician**
- Responsibilities:
  - Coordinating content themes based on calendar (see strategies section)
  - Facebook Content Tweets; Campaign Tweets (see strategies section)
    - During campaign weeks, BHL Technician manages all tweets,

including constructing tweets about Flickr, BHL, and iTunes U campaign collections
- ■ Archiving campaign-related tweets (see campaign section)
- ○ Scheduling intern campaign related tweets if interns do not utilize Hootsuite
- ○ Daily tweet for new images pinned to Pinterest (IF APPLICABLE - SEE BELOW).

**BHL Technical Advisory Board (TAG)**
- Responsibilities:
  - ○ TBD specifics, but will develop system whereby TAG members can initiate and foster tech conversations via Twitter.

## Details

### Types of Posts
- **Facebook Content** (targets scientists/researchers; citizen scientists/people interested in biodiversity; Artists/Art Historians (when link to images); Bibliophiles (when targeting authors and publications); Librarians (when targeting publications).
  - ○ Content-related tweets on Facebook will be limited to reposting the content that constituted the Facebook post for that day. The BHL Technician will rephrase that topic as a tweet and link to the image or page in BHL. This will replace the Image of the Day, Species of the Day, and Biodiversity News tweets, and will publish at 11am daily.
  - ○ Recommended quizzes be restated as factoids rather than quiz, as quizzes on Twitter do not historically perform well for BHL.
  - ○ Include "leading" phrases in tweets to encourage users to click on links to return to BHL.
- **Project News Announcements** (targets all Twitter audiences)
  - ○ These will usually link to the blog, but will highlight when important things happen (milestones, new funding), when newsletters release, or when quarterly reports release.
  - ○ These tweets also include information about public presentations or conferences that BHL or its staff are a part of.
- **Tech Conversations** (targets techies; data exports target librarians)
  - ○ Weekly tweets outlining what our developer is working on this week
  - ○ As appropriate, TAG can ask opinions/start conversations about techie things
  - ○ Periodic links to APIs, Data Exports
- **Services** (Targets all Twitter users)
  - ○ Periodic tweets that highlight our services, like Flickr, Pinterest, name

finding, APIs, Data Exports, etc., with links to appropriate pages.
- ○ Also include periodic calls to tag BHL Flickr images
- **Workflow** (targets librarians and maybe bibliophiles)
  - ○ Image-based tweets, showing some part of the digitization workflow. Particularly good to have preservation and pictures showing people actually scanning books. Include handles for BHL partner institutions that contributed the workflow images. Include link in BHL to title of book featured in photo, if known and available.
  - ○ Create image library to pull from.
- **Tweets from Pinterest** (Targets Citizen Scientists/People interested in Biodiversity; Artists/Art Historians; Bibliophiles)
  - ○ Automatic tweets that are sent out when new images are added to Pinterest.
  - ○ NOTE: In Twitter Light, these will only publish during campaigns, unless BHL staff decide to employ suggestion for ONE pin per day, at 2pm. Then, tweet will publish at 2pm daily.
- **Recent Additions** (Targets librarians primarily, but also citizen scientists/people interested in biodiversity and scientists/researchers; maybe techies if want to know about recent content)
  - ○ Tweets that highlight a book in the recent additions feed and link to the feed for more recent additions: http://biodiversitylibrary.org/recent
- **Permissions** (Target Librarians, Scientists/Researchers, maybe Techies)
  - ○ Tweets when we get permission to scan a new in-copyright title. Include links to title in BHL if some volumes are already available.
- **Blog Tweets** (Targets Citizen Scientists/people interested in Biodiversity; Bibliophiles; Scientists/Researchers; Librarians; Artists/Art Historians (depending on content)
  - ○ Tweet when a new blog post publishes on BHL. These tweets will link to the blog post. **These are specifically non-project news posts, since those are covered in project news tweets. These include Book of the Week and BHL User posts.** At least four tweets for each book of the week blog post should publish, and at least one for the BHL User posts.
- **Guest Blogging Calls:** (Targets all Twitter audiences)
  - ○ On a monthly basis, BHL will send out a tweet calling for guest bloggers. Tell users to express interest via feedback form.
- **BHL User Calls:** (Targets all Twitter audiences)
  - ○ On a monthly basis, BHL will send out a tweet calling for users to interview for the Blog. Tell users to express interest via feedback form.

Schedule

**Daily**
- Content Tweet from Facebook (11am Tweets)
- Tweets from Pinterest (NONE or at most 1 at 2pm (see Pinterest Light section below)

**Weekly** (3pm Tweets)
- Recent Additions (Monday)
- Tech Conversation (Tuesday; Developer working on - managed by Program Manager)

**Monthly** (3pm Wednesday Tweets)
- Service Tweets: Once a month send out a tweet highlighting a non-techie service
- Image Service Tweet: Once a month send out a tweet highlighting Flickr or Pinterest
- Techie Service Tweets: Once a month send out a tweet highlighting a techie service.
- Guest Blogging Calls
- BHL User Calls

**Monthly**
- Book of the Month Blog Post Tweets (See Blog Light section below for more information. Typically Thursday and Friday but also as posts publish; publish at least four tweets per book of the month blog post)
  - Posting Day: 1st Tweet = 10am; 2nd Tweet: 3pm if Thursdays, otherwise 4pm
  - Day After Posting Day: 1st Tweet = 10am; 2nd Tweet = 3pm if Fridays, otherwise 4pm
  - If more than one content-related blog post per month publishes (see Blog Light section for more information), this same schedule (four tweets per post, 2 on posting day; two day after posting; 10am and 3pm or 4pm, depending on days) applies for advertising those posts as well.
- BHL User Blog Post Tweets (Typically Tuesdays but also as posts publish; publish at least one tweet per BHL User blog post)
  - Posting Day: 10am

**As Appropriate (12pm)**
- Links to authors and publications as appropriate, as informed by calendar (see below; responsibility BHL Technician; can be in lieu of species factoid or image highlight or in addition)
- Project Updates (link to BHL blog posts, typically)
- Tech Conversations (when something to ask/discuss - managed by TAG)

- Links to conferences or presentations happening by staff or pan-BHL conferences
- Permissions
- Workflow (Program Manager responsible for gathering these and posting as provided, but probably no more regularly than a monthly basis. When gathered, these pictures and information should also be shared with the BHL Technician for use on Facebook).
- Links to mentions about BHL on the web or in articles (often gleaned from Google Alerts)

**Note: During campaign weeks, same schedule as articulated above for campaigns applies even in Twitter Light version. All Twitter content will relate to campaigns, and the following schedule will apply:**

- Daily, two factoid tweets, related to campaign and linking to BHL content: 11am and 3pm
- Four Blog Post tweets, two publishing day of post publication (10am and 1pm) and two day after post publication (10am and 1pm)
- Throughout week, tweets advertising the iTunes U, BHL, and Flickr collections (12pm)

See Twitter Section for more details on this platform. Evaluations remain the same as articulated in Twitter section, though goals may need to be adjusted.

## FACEBOOK LIGHT

For Facebook Light, it is recommended that staff post only once a day to Facebook. As 10am was shown as the most popular posting time, these once-daily posts should publish at 10am daily.

The types of posts are still being maintained. Whenever a blog post publishes (typically), a Facebook post should promote the blog post, include an image from it, and link to it. The remaining days of the week should switch between Biodiversity News and Quiz posts. The BHL Technician should err on the side of quizzes for posts (still do at least one biodiversity news post per week, but perhaps two quizzes, etc.), as these types of posts perform slightly better on Facebook. If workflow content is available during a week,that should publish as one of the Facebook posts.

## Responsible Parties

**BHL Program Manager**
- Responsibilities:
  - Statistics
  - Archive Facebook posts on bi-annual basis

**BHL Technician**
- Responsibilities:
  - Coordinating content themes based on calendar (see strategies section);
  - Campaign-related posts, unless designated to interns
    - Archiving campaign-related posts
  - Biodiversity News; Blog Posts; Quizzes; Workflow
    - Posting quiz answers, including for intern posts
  - Praise to Testimonials wiki page
  - Replying to comments and messages posted to the BHL Facebook page as required.
  - Granting BHL staff administrative rights to the BHL Facebook page (except in case of interns)
  - Scheduling intern Facebook posts if interns not granted access to Facebook

**Collections Coordinator**
- Responsibilities:
  - Make interns creating Facebook posts temporary BHL Facebook page administrators
  - Review intern Facebook posts
  - Revoke intern Facebook admin access after internship

## Details

Types of Posts

- **Quizzes:** Feature images from BHL collection and a question related to the species/image/illustration/author/publication represented.
  - Species Factoids (Targets Scientists/Researchers; Citizen Scientists/People interested in Biodiversity; Artists/Art Historians (for the images associated with posts))
  - Author Factoids (Targets Librarians; Bibliophiles; Artists/Art Historians; potentially Citizen Scientists/People interested in Biodiversity, depending on the author)

- ○ Publication Factoids (Targets Librarians, Bibliophiles, and potentially Scientists/Researchers depending on the publication)
- ○ Answers to quizzes can be documented on this wiki page for copying and pasting answers to Facebook:
  https://bhl.wikispaces.com/social+media+brainstorm
  - All quizzes include links to the image used for the post in BHL.
  - The BHL Technician is responsible for posting answers to the Facebook quizzes
- **Biodiversity News:** Features a news story about biodiversity and a related image from BHL. (Targets Scientists/Researchers; Citizen Scientists/People interested in Biodiversity; Artists/Art Historians)
  - ○ Include link in BHL for image used in post.
- **Workflow:** Periodic posts of pictures of various workflow elements, with brief descriptions of the process. Whenever the BHL Program Manager receives these for Twitter, she should share them with the BHL Technician for use on Facebook. Include the handle for the Facebook page of the institution that contributed the picture in the Facebook post.
- **Blog Posts:** A short Facebook post referencing a BHL blog post. In general, all BHL Blog posts are reposted as a Facebook post that links back to the blog post. This is usually limited to twice a week at most. An image related to the blog post should accompany the Facebook post. Blog posts about quarterly reports, newsletters, BHL Users, and book of the week posts should always be featured on Facebook. (Targets all Facebook audiences)

Schedule

One Facebook post daily at 10am.

**Daily**
- *Quizzes:* (These will be either species, author, or publication-centered, based on BHL calendar events (see strategy section below). If there are no special events, species will be the default). 10am

OR
- *Biodiversity News:* 10am

OR
**As Appropriate**
- *Workflow:* As available, in lieu of the quiz, we will post a workflow image and some
  information about that image. If these prove extremely popular, we can move to posting

these regularly, as content allows. 10am
- *Blog Posts:* On days on which a blog post publishes, the Facebook post will feature that post.
These constitute project news update posts and book of the week posts, among other
things. 10am

**Note: During campaign weeks, same schedule as articulated above for campaigns applies even in Facebook Light version. All Facebook content will relate to campaigns, and the following schedule will apply:**

- Daily one Facebook post, 10am
- On Blog Post publication day, Facebook post will highlight blog post
- One day during week will be a post highlighting the BHL, iTunes U, and Flickr collections
- Three other posts that week will highlight factoids about campaign, linking to BHL content

See Facebook Section for more details on this platform. Evaluations remain the same as articulated in Facebook section, though goals may need to be adjusted.

## BLOG LIGHT

Current evaluation shows that the most popular types of posts on the blog are our Book of the Week posts. However, these are the posts that also require the most time and effort. Thus, it is recommended for Blog Light that the Book of the Week turn into a Book of the Month series, with one in-depth blog post about a BHL book each month. These will still include a Fickr set of the book's images, and should still be added to the BHL Book of the Week collection.

During campaign weeks, these posts will be related to the campaign. Guest or intern posts may also be published for these Book of the Month posts.

As book of the week posts are so popular, if it is possible to publish one more content-related post per month, this would be good. However, these additional posts can be very short - a simple "here's a great book in BHL; check it out!" These would be posts

with no research required - simply advertising another book in BHL. If they have images, these should again still be uploaded to Flickr. If no additional posts are possible, as long as there is one Book of the Month post per month, BHL will fulfill its outreach mission.

May consider changing Flickr and BHL collection titles "Book of the Week" to "Book of the Month," or could simply leave titles as is.

It is recommended that the BHL User series continues on a monthly basis, as these posts are very useful for project development priorities and are re-used in BHL reporting.

Project News should always be announced via blog posts, to publish as needed whenever new developments occur. These still include announcing newsletters and quarterly reports.

Beginning a Permissions series is still recommended.

Posts should continue to publish around 10am on the desired publication days. The standing calendar appointments for Book of the Week posts will have to be adjusted if Blog Light deployed.


## Responsible Parties

### BHL Program Manager
- Responsibilities:
  - Coordinating content themes based on calendar (see strategies section);
  - Coordinating guest blogging and BHL user posts
    - Ensuring posts documented on BHL Editorial calendar and include standard boilerplate requests for new submissions
    - Alerting BHL Technician to need to upload images to Flickr for appropriate guest blog posts and include link to set in post
  - BHL Update Posts
    - Ensuring posts documented on BHL Editorial calendar
  - Book of the Month Posts
    - Ensuring these books added to BHL Book of the Week collection
    - Ensuring posts documented on BHL Editorial calendar
    - Adding boilerplate calls for guest submissions to end of all Book of the Month posts
    - Contacting BHL Technician to upload Book of the Month book images to Flickr
  - Rewriting BHL Users Posts
    - Ensuring posts documented on BHL Editorial calendar
    - Sending narratives to interviewees for review

- - Statistics
    - Praise to Testimonials wiki page
    - Moderating comments and replying to comments as required
    - Granting or revoking blogger administrative or author access, except in case of interns

**BHL Technician**
- Responsibilities:
  - Campaign blog posts, unless delegated to interns (see Campaigns section)
    - Ensuring these books added to BHL Book of the Week collection
    - Ensuring posts documented on BHL Editorial calendar
    - Adding BHL, iTunes U and Flickr collection links to intern campaign blog posts
    - Identifying guest campaign blog post candidates, as applicable
  - Uploading Book of the Week images to Flickr and adding to Book of the Week collection (including for campaigns, unless delegated to interns)
    - Including for guest blog posts, if applicable

**Collections Coordinator**
- Responsibilities:
  - Permissions Posts
    - Ensuring posts documented on BHL Editorial calendar
  - Reviewing intern blog posts and scheduling for publication
  - Granting and revoking author permission status in blogger for interns during period of internship
  - Ensure book of the week books written by interns are added to the BHL Book of the Week website collection and uploaded to Flickr (intern responsibility to do this, but Collections Coordinator responsible for making sure it happens)
  - Ensure intern Book of the Week posts are added to the BHL Editorial calendar (intern responsibility to do this, but Collections Coordinator responsible for making sure it happens)

## Details


### Types of Posts

- **Project News:** (targets all blog audiences)
  - Posts about important project updates, milestones, and events. Includes posts about quarterly reports and newsletters.
- **BHL Users:** (targets Scientists/Researchers; Techies; Taxonomists; potentially other blog audiences depending on specialty of interviewee)

- ○ Posts interviewing different BHL users about their work and use of BHL.
- ○ Typically publish third Tuesday of each month.
- **Book of the Month:** (targets Citizen Scientists/People interested in Biodiversity; Artists/Art Historians; Bibliophiles; Librarians)
  - ○ Monthly posts highlighting a book in BHL., with very in-depth discussion of a topic. Should include links to Flickr sets.
  - ○ Include "leading" sentences (such as questions or "satisfy your curiosity" statements) with links to BHL to encourage more users to visit BHL from blog posts (see Current Evaluation section for more information).
  - ○ Typically publish on Thursdays
  - ○ During campaign weeks, these will relate to the campaign theme.
- **Brief Book Highlights, if Appropriate**
  - ○ If possible, the BHL Program Manager should try to publish one additional content-related post per month, in addition to the Book of the Month post. This will be a very brief highlight of a book in BHL, no research required. To publish on a Thursday of the month. Should include links to Flickr sets.
- **New Permissions:** (Targets Scientists/Researchers; Librarians; potentially taxonomists)
  - ○ Brief posts announcing new permissions gained for BHL.

Schedule

Posts publish 10am on days for publication.

**Monthly:**
- Book of the Month (Publish Thursdays typically)
  - ○ During campaign weeks, these relate to campaign theme.
  - ○ May publish on day other than Thursday if topic tied to particular date (i.e. biodiversity holiday, author birthday, etc.)
- BHL Users (Publish third Tuesday of month, typically)
- Brief Book Highlights (if possible, see above. Publish Thursdays)

**As Appropriate:**
- Project Updates
- Permissions Posts

See Blog Section for more details on this platform. Evaluations remain the same as articulated in Blog section, though goals may need to be adjusted.

## FLICKR LIGHT

To date, Flickr is the best-performing social media platform for BHL in terms of driving traffic back to BHL. It also feeds nearly all other social media activities. Thus, no changes are recommended for Flickr in Flickr Light. Staff should still:

- BHL Technician upload 5,000 images to Flickr annually
- Add Book of the Month (and Book Highlights, if appropriate) images to Flickr
- Create a collection for each campaign
- Create Collections and sets for special events, as required.
- Other BHL staff should upload images to Flickr as possible, following guidelines in Flickr section

See Flickr Section for more details on this platform. Evaluations remain the same as articulated in Flickr section.

## PINTEREST LIGHT

Until recently, Pinterest was the worst-performing BHL social media platform in all arenas. However, in mid-2013, it started slightly surpasses Twitter and the blog post visits back to BHL. Twitter and the Blog as platforms are still stronger performers, and their activities are more closely allied to the core of BHL's mission, with the ability to highlight project developments and content. However, since Pinterest has become such a popular platform for BHL relatively speaking, and since it is also used to document outreach materials like flyers, videos, and presentations, it is not recommended that Pinterest activity cease completely.

Instead, it is recommended that Pinterest be maintained for documenting staff content like flyers, posters, videos, presentations, etc., as needed, and be utilized for campaigns (four tweets per day from the campaign Flickr collection, pinned from BHL, as outlined in Pinterest section). If desired, staff may also pin one additional tweet per day, at 2pm, enabling the automatic tweet, since it is easy to pin new images to Pinterest.

However, it is recommended that Pinterest stats be maintained only for campaigns, using the Campaign Evaluation document.

## Responsible Parties

**BHL Technician**
- Responsibilities:
  - Pinning at least four images per day **for campaigns** to Pinterest from BHL website (two at 8am, two at 2pm)
  - **If desired**, pinning one image per day to Pinterest, at 2pm
  - Enabling automatic tweets from pinned images to Twitter
  - Creating new boards in Pinterest as necessary
  - Pinning BHL outreach material, handouts, slide presentations, videos, etc. to Pinterest
    - BHL Staff should inform the Technician about content needing to be pinned to Pinterest
  - Serving as the contact for suspected copyright violation pins
  - Replying to any messages or comments received via Pinterest

**Program Manager**
- Responsibilities:
  - Forwarding alerts received via biodiversitylibrary@gmail.com related to Pinterest to the BHL Technician
  - NO STATS EXCEPT FOR CAMPAIGNS

## Schedule

- Four images pinned per day for campaigns (two at 8am, two at 2pm)
  - Enable automatic tweets
- One image per day pinned at 2pm (IF DESIRED)
  - Enable automatic tweets
- AS NECESSARY: Pinning BHL outreach material, handouts, slide presentations, videos, etc. to Pinterest

See Pinterest Section for more details on this platform. Evaluations to be limited to campaigns, as articulated in campaigns section.

## CONFERENCES LIGHT

No changes recommended for conferences. Staff should plan to host one pan-BHL conference per year, and staff should actively promote BHL via presentations, posters, and papers as much as possible.

See Conferences Section for more details on this platform. Evaluations remain the same as articulated in Conferences section.

## LISTSERVS LIGHT

No changes recommended for listservs. Staff indicated as contacts for listservs on the wiki should promote BHL using the provided template text as possible, recording via listserv submission form. If Program Manager wants a big BHL development advertised via listservs, she should provide suggested language to the listserv contacts.

See Listservs Section for more details on this platform. Evaluations remain the same as articulated in Listservs section.

## NEWSLETTERS LIGHT

No changes recommended for Newsletters. Program Manager should publish four quarterly and advertise via blog, Twitter, and Facebook.

See Newsletter section for more details on this platform. Evaluations remain the same as articulated in Newsletter section.

## QUARTERLY REPORTS LIGHT

No changes recommended for Quarterly Reports. Program Manager should publish four quarterly and advertise via blog, Twitter, and Facebook.

See Quarterly Reports section for more details on this platform. Evaluations remain the same as articulated in Quarterly Reports section.

## PRESS RELEASES LIGHT

No changes recommended for Press Releases. Program Manager should publish as needed.

See Press Releases section for more details on this platform. Evaluations remain the same as articulated in Press Releases section.

## APPLE LIGHT

No changes to Apple are recommended, except in that it is recommended that decidedly no iBooks are attempted. It is recommended that four iTunes U collections be completed each year, which will feed four campaigns.

See Apple section for more details on this platform. Evaluations remain the same as articulated in Apple section.

## EXHIBITIONS LIGHT

In the "light" version of BHL, NO BIODIVERSITY LIBRARY EXHIBITIONS ARE RECOMMENDED.

## SWAG LIGHT

No changes recommended. The Program Manager should maintain a supply of the following available to all BHL institutions, if budget allows:
- Business Cards
- Buttons
- Stickers
- Pens
- Mini Notebooks
- Greeting Cards
- Brochures

See Swag section for more details on this platform. Evaluations remain the same as articulated in Swag section.

## PUBLIC WIKI LIGHT

No changes recommended to public wiki. Each person responsible for keeping their assigned pages up to date, as discussed in public wiki section above. BHL Program Manager will alert responsible parties about most popular pages, to ensure these are prioritized for updating.

Erin Thomas and BHL Collections Coordinator to continue work improving public wiki, as discussed above.

See Public Wiki section for more details on this platform. Evaluations remain the same as articulated in Public Wiki section.

## CALENDAR LIGHT

No changes recommended for calendar. See Calendar section for more details on this platform.

## CAMPAIGNS LIGHT

In an ideal scenario, BHL would try to do one campaign per month, with four of those campaigns being the iTunes U campaigns. In the "Light" version, BHL should plan only to do four campaigns per year, the iTunes U campaigns. The same schedule and guidelines for the iTunes U campaigns as articulated above should be employed, including the use of interns, if possible. Refer to the iTunes U Campaigns section in the Strategies\Campaigns section for more information.

### Responsible Parties

**BHL Technician**
- Responsibilities:
    - Creating new Campaign Planning and Evaluation spreadsheet each year
    - Adding Responsible Parties and Due dates to each element for each campaign in the planning document
    - Adding Due Dates to the BHL Editorial Calendar for each specified task and sharing those appointments with the people assigned to the task
    - Populating all required fields in the Elements section of each campaign in the planning document, unless designated elsewhere
    - Composing all Facebook Posts, Tweets, and the Blog Post for all campaigns if interns not available
        - Adding campaign keyword as Hootsuite tag to all campaign tweets
        - Adding "book of the week" and the campaign keyword as tags to the blog post
        - Documenting the blog post on the BHL Editorial Calendar
        - Adding the book featured in the blog post to the BHL Book of the Week collection.
        - Including Flickr, iTunes U, and BHL collection links in blog post
    - Adding BHL, iTunes U, and Flickr collection links to the blog post for campaigns, if written by someone else
    - Flickr, iTunes U, and BHL Collection Facebook post for iTunes U campaigns
    - Flickr, iTunes U, and BHL Collection Tweets for iTunes U campaigns
    - Pinning images related to campaign on Pinterest and sharing via automatic Tweets

- Archiving the Tweets and Facebook posts for all campaigns
  - Setting up Hootsuite Archive for "[campaign keyword] @BioDivLibrary"
- Creating the Flickr collection for the campaign (unless assigned elsewhere)
  - Collection should include images from all appropriate books in the BHL and/or iTunes U collections, if applicable
  - Adding books added to Flickr collection to "Books Used" section of campaign planning document, unless already documented
- Uploading the blog post book's images to Flickr (unless assigned elsewhere)
  - Adding the set to the "Book of the Week" collection and the campaign Flickr collection
- Arranging collaborations with identified institutions or entities for the campaign
- Creating artwork for BHL and/or iTunes U collections, unless otherwise assigned
- Evaluating campaigns using Campaign Planning and Evaluation document

**Collections Coordinator**
- Responsibilities:
  - In collaboration with Collections Committee, identifying topics and dates for four iTunes U collections and associated campaigns per year
    - Adding iTunes U campaign titles, dates, and descriptions to the campaign planning document
    - Adding iTunes U campaign dates to the Editorial Calendar
    - Alerting BHL Technician when iTunes U campaign information available in campaign planning document
  - Leading Collections Committee in identification of books and descriptive information for all BHL Collections and iTunes U Collections
    - Adding books used for the collections in the "Books Used" section of the campaign planning document
    - Alerting BHL Technician when "Books Used" available for use in Flickr collection creation
  - Creating all required BHL collections and iTunes U collections in BHL for campaigns
    - Setting BHL collection as featured collection in BHL on the first Monday of campaign
  - Publishing all iTunes U collections in iTunes U
  - Overseeing interns working on campaigns

**Program Manager**
- Responsibilities:
  - Contributing to campaign topic choices for iTunes U campaigns

See iTunes U Campaigns section for more details on this platform. Evaluations remain the same as articulated in Campaigns section, with use of Campaigns Evaluation document.

## COLLABORATIONS LIGHT

Collaborations are still an important component of BHL Outreach, even in the "light" version, as they ensure that the widest possible audience is exposed to BHL content. Collaborations are divided between two different types:

- Passive: Involves including as many hashtags and handles for related entities (especially BHL partner institutions) in Tweets and Facebook posts as possible. Does not require notification to included entity that we are including these hashtags and handles.
- Active: Actively working with other entities to share social media content. Involves contacting (or being contacted by) other entities to provide content or request sharing of BHL social media content.

BHL has standing collaboration relationships with EOL and the National Museum of Natural History. Currently, BHL sends weekly content to EOL and NMNH for publication via their own Twitter and Facebook outlets. This relationship is very beneficial for BHL, and thus should be continued. However, it is recommended that in the "light" version, these collaborations are reduced to monthly rather than weekly.

BHL should plan to continue collaborations efforts for campaigns, as articulated above.

BHL should utilize passive collaborations as much as possible.

Additional active collaborations should only be planned on an ad hoc basis, as resources allow. No additional standing collaborations should be implemented, unless additional staff are available.

### Responsible Parties

**Program Manager**
- Responsibilities:
  - Include handles for outside entities, including BHL member institutions, within content composed whenever possible
  - Serve as outside contact for collaboration requests and coordinate collaboration requests as required
    - Forward requests for collaborations on platforms Program Manager is not responsible for to person responsible for that platform
  - Perform collaborations related to platforms for which the Program Manager is responsible for (unless designed to BHL Technician)

- - - Add "collaboration" tag to tweets and blog posts involving collaborations
    - Review collaboration success in relation to top posts during bi-annual review
    - Set up archive for "collaboration" tag in Hootsuite

**BHL Technician**
- Responsibilities:
  - Include handles for outside entities, including BHL member institutions, within content composed whenever possible
  - Monthly EOL and NMNH collaborations
  - Campaign collaborations
    - cc Program Manager on collaboration requests
  - Perform collaborations related to platforms for which the Technician is responsible for
  - Coordinate collaboration requests with Program Manager as required
    - Forward requests for collaborations on platforms Technician is not responsible for to person responsible for that platform, cc'ing Program Manager on communication
  - Add "collaboration" tag to tweets and blog post involving collaboration
  - Review collaboration success in relation to campaigns

**Collections Coordinator**
- Responsibilities:
  - Include handles for outside entities, including BHL member institutions, within content composed whenever possible
  - Perform collaborations related to platforms for which the Collections Coordinator is responsible for
  - Add "collaboration" tag to tweets and blog posts involving collaborations

See Collaborations section for more details on this platform. Evaluations remain the same as articulated in Collaborations section.

## EVALUATION LIGHT

The Outreach Evaluation document will still be used on a bi-annual basis to evaluate BHL outreach. The same metrics will be employed. Only slight changes:
- Pinterest metrics will not be kept
- Goals may need to be adjusted for Twitter, Facebook, and Blog, depending on

changes adopted in "light" outreach version
Campaign evaluations will continue via the Campaign Evaluation document, as articulated in the Campaigns section.

| **APPENDIX** |
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| **Appendix A** |
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# Guest Blogging Submission Guidelines

Thank you for your interest in writing a blog post for the Biodiversity Heritage Library (BHL, www.biodiversitylibrary.org). The post will publish on the BHL Blog (http://blog.biodiversitylibrary.org) on the date arranged by the BHL Program Manager and communicated to you. If you believe the post should publish on a particular date, please include that information in your submission.

All materials required for your blog post should be sent to feedback@biodiversitylibrary.org, attention Carolyn Sheffield, by ___[Program Manager input due date]___

**Materials Required:**

1. Completed form below
2. Word document with desired pictures and captions (with image credits if applicable) included within the text in the location you wish them to appear in the blog post
3. Text for blog post, in .txt file format
4. .jpeg files of each image you wish to include in the blog post, of at least 300pixels in width (Right click on the file and view info or properties to determine the dimensions of your image) and at least 180 dpi  in terms of resolution (http://en.wikipedia.org/wiki/Dots_per_inch)

**Post Guidelines:**

- Posts should be between 250 and 700 words. If your post topic requires more words than this, contact the BHL Program Manager at feedback@biodiversitylibrary.org about dividing your submission into two separate blog posts
- Your topics must relate to biodiversity or natural history and should not have religious, racial, or political undertones, unless as an academic observation or analysis
- Your post *must* refer to BHL resources and include links to content within BHL. If related

to a BHL book, the title of the BHL book, with link to that book in BHL, should appear within the first paragraph of the post.

- Your post must include at least one image (which you will provide) with caption and image credits (image credits if applicable). Ideally, this will include at least one image from BHL. You must ensure that use of your image is not a copyright violation.
- Fact check your post. You are responsible for its accuracy. BHL maintains the right to perform grammatical or simply style edits, if necessary.
- Style should be friendly and conversational, while avoiding colloquialisms, slang, and LOL speak.
- BHL reserves the right to reuse content from this blog post in reports and other outreach materials
- BHL reserves the right to decline your post, or remove your post from our blog, if required.

**Please Complete and Return the Form Below by Due Date Above:**

1. Name, as you wish it to appear in your credit line:_____
2. Email Address to use for correspondence related to your post:_____
3. Topic of Blog Post: _____
4. Suggested Date of Publication, if Topic Related to Particular Date:_____
5. Title of Blog Post: _____
6. Suggested Tags for your Blog Post:

   _____

# BHL User Blog Post Submissions

Thank you for your interest in being interviewed for the Biodiversity Heritage Library (BHL, www.biodiversitylibrary.org) BHL and Our Users blog series (http://blog.biodiversitylibrary.org/search/label/bhl%20users). For this series, BHL interviews a different BHL user in each post about their work and how they use BHL to support that work.

The post will publish on the BHL Blog (http://blog.biodiversitylibrary.org) on the date arranged by the BHL Program Manager and communicated to you. If you believe the post should publish on a particular date, please include that information in your submission.

To participate in this series, please complete the questionnaire below and send it, along with other indicated required materials, to feedback@biodiversitylibrary.org, attention Carolyn Sheffield, by ___[Program Manager input due date]___

**Required Materials:**
- Completed questionnaire, below
- .jpeg image files of each image you wish to include in the blog post, of at least 300pixels in width (Right click on the file and view info or properties to determine the dimensions of your image) and at least 180 dpi  in terms of resolution (http://en.wikipedia.org/wiki/Dots_per_inch). ***One of the images must be a photo of you.***
- .txt file with all image captions and credits, if applicable, labeled according to the image file name sent with your submission

**Post Information:**
- The BHL Program Manager will translate your questionnaire into a narrative piece, which will be sent to you prior to publication for review. If you do not provide feedback on the narrative piece by the date requested by the Program Manager, the post will publish as is on the date specified for publication.
- Your post must include at least one image of you, and any additional images you wish to include (which you will provide) with caption and image credits (image credits if applicable). You must ensure that use of your image is not a copyright violation.
- BHL reserves the right to reuse content from this blog post in reports and other outreach materials
- BHL reserves the right to decline your post, or remove your post from our blog, if

required.

**Please Complete the Questionnaire Below and Return it by the Due Date Above: (Questionnaire for all Users Except Librarians)**

1. Name
2. Email Address to use for correspondence related to your post
3. Suggested Date of Publication, if Topic Related to Particular Date
4. Suggested Title of Blog Post
5. Suggested Tags for your Blog Post
6. What is your title, institutional affiliation (or alternative place of employment), and area of interest?
7. How long have you been in your field of study?
8. When did you first discover BHL?
9. What is your opinion of BHL and how has it impacted your research?
10. How often do you use BHL?
11. How do you usually use BHL (read the titles online/download whole PDFs/Selecting Pages to Download for a custom PDF/Downloading High Resolution Images/Generating Taxonomic Bibliographies/etc.)
12. What are your favorite features/services on BHL?
13. If you could change one thing about BHL, what would it be, or what developmental aspect would you like the BHL team to focus on next?
14. If you had to choose one title/item in BHL that has most impacted your research, or one item that you prefer above any other in BHL, what would it be and why?

**Please Complete the Questionnaire Below and Return it by the Due Date Above: (Questionnaire for Librarians)**

1. Name
2. Email Address to use for correspondence related to your post
3. Suggested Date of Publication, if Topic Related to Particular Date
4. Suggested Title of Blog Post
5. Suggested Tags for your Blog Post
6. What is your title and institutional affiliation (or alternative place of employment)?
7. How long have you worked in a library environment?
8. When did you first discover BHL?
9. What is your opinion of BHL and what impact has it had on your duties as a librarian?
10. How often do you use BHL?
11. How do you usually use BHL (read the titles online/download whole PDFs/Selecting Pages to Download for a custom PDF/Downloading High Resolution Images/Generating Taxonomic Bibliographies/etc.)
12. What are your favorite features/services on BHL?

13. If you could change one thing about BHL, what would it be, or what developmental aspect would you like the BHL team to focus on next?
14. Is there a specific item on BHL that is most often requested by your patrons/that you use more than any other to fulfill ILL requests?