



January 29, 2024

To whom it may concern,

Social Media Archiving (formerly known as ArchiveSocial) by CivicPlus is the sole provider of social media archiving software that is capable of integration with the website search functionality of Municipal Websites (formerly known as CivicEngage) Central Platform by CivicPlus.

HIDALGO COUNTY, TX

**Sole Source Justification for Procurement of  
Social Media Archiving, Monitoring, Analytics,  
& Website Capture Software Service**

**SERVICE TO BE ACQUIRED**

Hidalgo County is seeking to procure a '*social media archiving, monitoring, analytics, and website capture*' software service platform to comply with the Texas Public Information Act and

to mitigate the increasing risk that these digital communications present. The estimated annual cost is to be \$11,988.00.

- i. The Texas Public Information Act defines public records as “general forms in which the media containing public information exist [including] a book, paper, letter, document, e-mail, internet posting, text message, instant message, other electronic communication, printout, photograph, film, tape, microfiche, microfilm, photostat, sound recording, map, and drawing and a voice, data, or video representation held in computer memory”. By this definition, information posted to our social media platforms and website (by our agency as well as the incoming information received from the public), can constitute public records in Texas and must be retained by our agency.
- ii. As online communications increasingly serve as a primary communications channel with our citizens, the ability to retain and produce accurate social media and website records becomes increasingly important. Specifically, these digital records may prove critical in protecting the County during legal proceedings and other risk-oriented circumstances.
- iii. Additionally, our agency can further mitigate risk by staying aware of questions, complaints, and other important issues that may arise on our social networking sites. Monitoring and alerting technology will substantially improve our ability to enforce our policies and stay abreast of issues on our social networking sites at all times.
- iv. Our website and social media channels increasingly serve as our primary communication channels with our citizens. The ability to review, analyze, and report on the impact of social media on our agency’s initiatives is increasingly important. Analytics and reporting technology is necessary for allowing us to generate and share information frequently without diverting staff resources and time.

These requirements justify the need for Hidalgo County to establish the use of a ‘*social media archiving, monitoring, analytics, and website capture*’ software service platform. Because social networking platforms are developed and managed by external third parties and do not offer consistent or complete mechanisms to archive data, there is significant variance in the quality and comprehensiveness of archiving offered by competing technologies. The solution must fundamentally start with a focus on social media archiving. We must evaluate and select the technology that best overcomes the inherent limitations of the social networking platforms and thereby provides the highest level of protection and compliance with records laws available, as well as a comprehensive monitoring and analytics suite.

## **SERVICE REQUIREMENTS**

### **User Experience & Interface**

- Provides organizational management capabilities that allow for centralized oversight of social media records across multiple users and departments.
- Allows individual users and departments to access their own relevant set of information in the event of a records request, legal discovery, or internal request, without the

assistance of IT or a system administrator.

- Provides complete and accurate replay of social media conversations and the related context in a manner that mirrors the original social network. Specifically, conversation threads must be fully replicated and expandable on all content types and platforms that support conversations and message replies.
- Displays a version history of records for all content that has been edited, highlighting the relevant versions based on the context of what the user is currently viewing or searching.
- Annotations to allow users to create, search, cross-collaborate, and maintain internal notes regarding the records captured in the archive.
- Provides a comprehensive trial or pilot period to ensure the solution claims meet needs and expectations.

### **Social Media Data Capture**

- Must integrate with our social media accounts to capture records regardless of how or when content is posted to social networks.
- Archives the primary channels of sent and received communications across each supported social networking site, including publicly viewable communications as well as private/direct messages.
- Ingests all historical information (communications created before archiving), from social media account inception, provided by the APIs for each social networking account added to the archive.
- Ensures detailed capture of each communication that includes full-resolution photos and videos, and any other associated information (e.g. comments on comments, images and gifs embedded within comments, other multimedia, shortened URL information, etc.).
- Captures all supported social media content in a 100% native and authentic format (i.e with no data conversion or reliance on web scrapers), complete with full technical metadata, obtained directly from each social networking API.
- Timestamps all native metadata and supporting multimedia with digital signatures to prove authenticity and ensure records can serve as legal evidence if needed.
- Provides near real-time capture (with the majority of records being captured via streaming API within seconds) of records across all supported platforms.
- Continually re-verifies and updates the archived history of each social media account to mitigate the risk of inconsistent or incomplete data due to changes or downtime incurred by a social network.
- Captures new comments on existing posts in the history, across all supported platforms, regardless of how far back in the history the original post was created.
- Detects and captures new versions of records when text or multimedia in a communication is modified on any of the supported social networking platforms, regardless of whether or not the social networking platform provides explicit notification of such changes. Records with multiple versions are tagged as edited.
- Detects when content is deleted on any of the supported social networking platforms, regardless of whether or not the social networking platform provides explicit notification of deletions, and tags all affected records as deleted in the archive.
- Detects when comments are hidden on Facebook and tags the affected records in the archive.
- Detects when Instagram Stories are expired 24 hours after posting and tags the affected records in the archive.
- Automated capture of Facebook and Twitter Blocked Lists. Including additional captures

any time a user is blocked or unblocked to support a timeline for when and why a user was blocked/unblocked.

- Retains captured records in the archive, and provides continued access to those records, even if the social networking page has been deactivated or no longer exists.
- Captures dynamic media such as live-streamed video on platforms including Facebook Live and Twitter's Periscope.

### **Website Data Capture, User Experience, Searchability, & Export**

- Provides automated capture of all agency affiliated websites, by capturing the visual representation of each webpage with the affiliated HTML, into one dashboard.
- Checks sitemaps and URLs at least once per day by monitoring for changes to last modified dates and/or meaningful changes to a web page's content.
- Provides a simplified setup and maintenance by only requiring the use of our sitemap, automatically accounting for when URLs are added or removed.
- Allows the addition of individual URLs that may not be associated with our sitemap.
- Provides a simplified user interface consistent with the core social media archive, including similar record versioning.
- Provides the ability to search by date range, keyword, keyword combinations, phrases, or to search directly for URLs that have experienced updates.
- Provides the ability to check individual URL version histories by date.
- Provides the ability to export based on search results or by individual URL version histories.
- Provides the ability to export in PDF, CSV, and HTML.

### **Social Media Searchability**

- Provides searchability across all, or any combination of, archived social networking sites in a single search query.
- Provides the ability to restrict searching based on date ranges, keywords, keyword combinations, phrases, specific social networking accounts, specific social networking content types, and conversation participants (to/from information).
- Provides the ability to designate 'and' / 'or' options when combining search criteria.
- Supports searches based on tagging, including the ability to locate content that was automatically tagged as deleted, edited, hidden, or expired.
- Provides the ability to search for user-created annotations (custom notes on records).
- Automatically categorizes search results and allows for instant filtering to help locate and identify content relevant to a records request, legal discovery, or internal request.
- Implements full replay of conversations and content related to search results. For example, if a single comment matches the search query, the solution must be able to replay the entire surrounding conversation in which the content appeared.
- Automatically prioritizes and highlights the versions of a record that match the search query when a record has multiple versions due to edits.

### **Social Media Data Export**

- Provides the ability to mass export all records across the archive as well as based on search queries (according to the detailed criteria outlined in Searchability above).
- Accurately exports records in PDF format with all text, images, and links, and in a manner allows for searchability of the PDF.
- Reconstructs conversation threads when exporting to PDF format, to ensure that the full

context of a conversation is included even when exporting specific comments or message replies. The export must recombine independent search results that belong to the same conversation thread to avoid duplication and confusion in the output.

- Automatically prioritizes and exports the most relevant version of a record, to avoid duplication and confusion, when a record has multiple versions due to edits.
- Highlights all records that matched the original search query when exporting to PDF.
- Provides additional options for exporting full-resolution multimedia and metadata.
- Supports additional export formats including HTML and CSV.

### **Retention Scheduling**

- Includes support for retention schedules and disposition of records.
- Allows for retention based on the content of individual records to ensure that our agency's existing retention schedules can be applied to social media content.
- Supports global retention periods for the entire archive, specific social media accounts, and specific departments.

### **Automatic Monitoring & Alerting**

- Generates email alerts that can be delivered to one or multiple recipients and at differing frequencies.
- Generates alerts, based on content matching, for keywords and phrases. Provides out-of-the-box keyword dictionaries and support for monitoring content that violates policies and/or involves public safety issues. Provides the ability to create custom keyword dictionaries, based on our agency's needs.
- Generates alerts when a citizen raises a question on our social media sites to ensure that we can maintain a high degree of responsiveness.
- Generates alerts, based on content matching, when there is an indication that a citizen's personally identifiable information was revealed on our social media sites, which in turn violates our policies or presents other legal risks.
- Generates alerts, based on content matching, when inappropriate images are shared to our social media sites, ensuring we can remove or address the content as soon as possible.
- Generates alerts when users are blocked on our social media sites, allowing us to ensure our policy is properly followed and citizens' First Amendment rights are upheld.
- Generates alerts, based on content matching, when a specific user interacts on our social media sites, which can be used to track trolls or persons of interest.
- Provides alerting across supported social networking platforms on a near-real-time basis.

### **Reporting & Analytics**

- Provides detailed activity metric reporting related to our agency's social networking communications (both sent and received) across all supported platforms, and the entire history of the archive.
- Tracks positive and negative citizen sentiment across our social media accounts and provides trend reports to help monitor ongoing changes in perception, and identify specific incidents affecting the brand of our agency.
- Automatically generates lists of high and low performing conversations on social media based on citizen sentiment.
- Reports which citizens are active across our social networking presence to ensure that we can effectively manage our most vocal critics and advocates.

- Generates reports based on the alerts received (according to the detailed criteria outlined in Automatics Monitoring & Alerting above) allowing us to gauge and redefine the effectiveness of our alerting criteria.

### **Customer & Technical Support**

- Unlimited support should be provided at no additional cost, including but not limited to onboarding, training, troubleshooting, and help with records requests.
- Exercised expertise should be demonstrated through a history of supporting public sector clients in fulfilling records requests, internal requests, and legal e-discoveries.
- Support should be available by email, phone, and social, with all support staff US-based, available Monday through Friday.
- Support response time should normally be within 1 hour and guaranteed within 24 hours, available Monday through Friday.
- An online support center should be updated regularly and available 24/7.
- On-going best practice support should be offered through the use of educational webinars and policy resources.

### **VENDOR RECOMMENDATION**

Hidalgo County is seeking to engage ArchiveSocial to fulfill these requirements and needs. ArchiveSocial is the only provider of a *'social media archiving, monitoring, analytics, and website capture'* software service platform with a predominant focus on the public sector, protecting over 3,500 government entities, law enforcement agencies, and educational organizations in 50 US states, with customers in 7 countries. Over 400 agencies in Texas already partner with ArchiveSocial including Edinburg, Weslaco, Harlingen, Bexar County, the Texas DHHS, Texas Dept. Of Agriculture, and State Bar of Texas.

In 2021, ArchiveSocial was recognized as a GovTech 100 company by Government Technology Magazine for the 6th consecutive year. ArchiveSocial is a US-based, minority-founded corporation with sales, operations, product development, and customer support headquartered at 212 W Main Street Durham, NC 27707. ArchiveSocial can be reached at (888) 558-6032.

### **SOLE SOURCE JUSTIFICATION AND DETERMINATION**

While other vendors provide some form of social media archiving capabilities, we assess that ArchiveSocial is the only vendor that comprehensively and directly meets the above service requirements. Based on market research and peer evidence, no other social media archiving vendor provides the level of comprehensive, detailed, and authentic capture of social media as

ArchiveSocial. Specifically:

- No other vendor guarantees the majority of their social media capture to be within seconds. No other vendor automatically detects and tags changes (edits, deletions, hidden records, and expired records) across all supported social networking platforms in native format. No other social media archiving vendor provides technology that comprehensively re-verifies the entire available history of our social media platforms to mitigate any inconsistencies and temporary gaps in data provided by the social networking platforms. No other vendor captures Blocked Lists on Facebook and Twitter. No other vendor provides such a granular level of detail in their search parameters, which is often needed to find meticulous social media records. No other vendor provides a comprehensive trial or pilot period to ensure the solution claims meet expectations. As a result, the use of another solution would likely reduce our compliance with the Texas Public Information Act and increase our agency's risk. ArchiveSocial ensures our ability to respond to a social media or website records request, legal discovery, or internal request in the most complete and efficient manner possible.
- No other vendor provides a customizable monitoring and alerting technology that combines the ability to receive pattern detection alerts based on keywords, phrases, personally identifiable information, inappropriate images, blocked list changes, questions, and interactions with specific users. Accurate and timely alerts help enforce our policies, improve responsiveness, and mitigate risk.
- No other vendor provides detailed analytics and reporting of incoming and outgoing content, sentiment analysis, and conversation analysis to facilitate our regular reporting processes.
- No other vendor providing social media archiving services was purpose built for the challenge of archiving social media, mitigating social media risk, and fulfilling the needs of public agencies. ArchiveSocial can provide the strongest evidence of customer satisfaction and applicability to public records needs as demonstrated by their customer references, government case studies, and public sector awards.
- Finally, no other vendor meets all of the service requirements above except for ArchiveSocial.

### **REQUEST FOR APPROVAL**

ArchiveSocial is the sole source of the service requirements listed. There is no known product or software service that includes all of these components in one service, or offered to the degree provided by ArchiveSocial. To this end, ArchiveSocial is unique in its ability to meet this sole source request.

My recommendation is based upon an objective review of the required service. I know of no conflict of interest on my part or personal involvement in any way with this request. No gratuities, favors, or compromising actions have taken place.

Hidalgo County, TX

I formally request that the sole source procurement of ArchiveSocial be approved, at an estimated annual cost of \$11,988 for Hidalgo County.

DATE OF SUBMISSION: 01/18/2024

Sincerely,

Carlie Anderson  
ArchiveSocial (powered by CivicPlus)