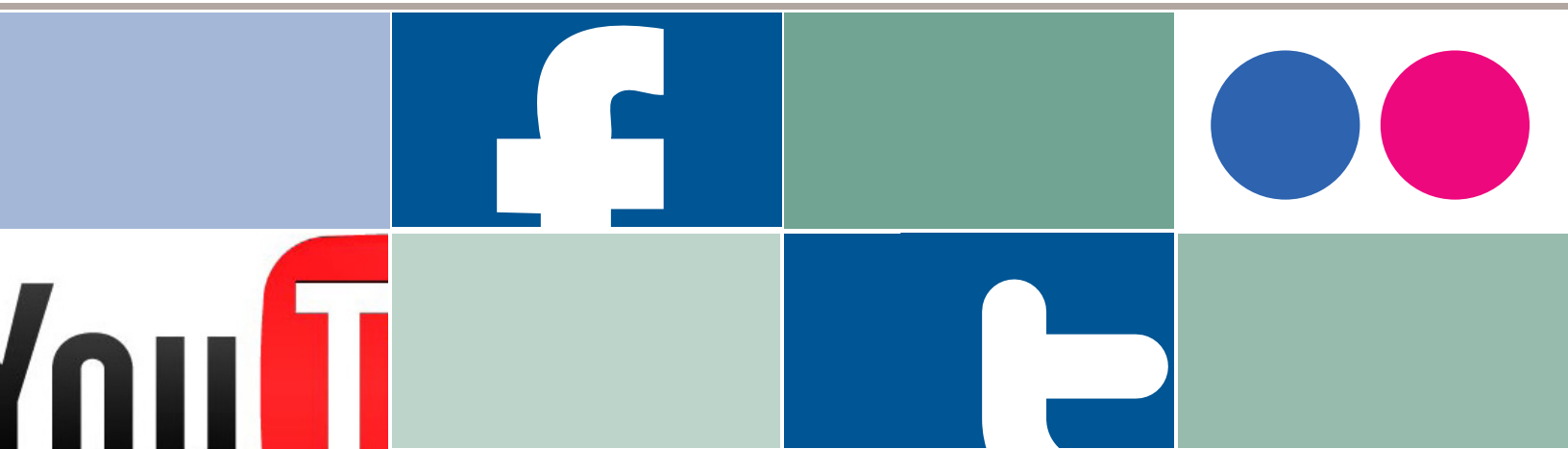




## THE NONPROFIT SOCIAL MEDIA DECISION GUIDE



September 2013

---

# TABLE OF CONTENTS

---

<b>Introduction .....</b>	<b>4</b>
What is Social Media—and Why Do I Need It? .....	7
<b>Defining Goals and Audiences.....</b>	<b>9</b>
<b>What Social Media Tools Are Available, and How Might They Help .....</b>	<b>10</b>
Facebook .....	10
Twitter .....	14
Blogs.....	16
Photo Sharing .....	18
Video Sharing .....	21
LinkedIn .....	24
Place-Based Applications.....	25
Other Tools .....	27
<b>Choosing Tools to Meet Your Goals.....</b>	<b>29</b>
Fundraising .....	29
Advocacy.....	33
Recruiting and Engaging Volunteers.....	35
Events .....	37
Online Promotion and Outreach.....	38
<b>Creating Your Social Media Strategy.....</b>	<b>40</b>
How Much Time Should I Spend On Social Media? .....	40
Defining Your Social Media Voice.....	42
Campaign and Maintain .....	43
Integrating Your Social Media Communications Mix .....	44
Measuring Your Success.....	45
Creating a Social Media Policy.....	48
Wrapping Up.....	50

---

# TABLE OF CONTENTS

---

**Workbook..... 51**

1. Identifying Your Social Media Goals.....52

2. Ensuring “SMART” Goals.....53

3. Defining Your Audience..... 54

4. A Sample Audience Survey ..... 55

5. Brainstorming Tool Possibilities.....57

6. Deciding Which Channels are Right For You..... 59

7. Defining Campaigns And Maintenance ..... 60

8. Thinking about Tone and Voice.....61

9. Integrating Communications ..... 62

10. Measuring Your Campaign..... 63

12. How Should You Respond? ..... 65

**Authors and Contributors .....66**

---

# INTRODUCTION

---

Social media can be useful to nonprofits. But *how* useful? What can an organization reasonably expect in terms of results and benefits, and for what investment of time and effort? We created the Idealware *Social Media Decision Guide* to help you answer those questions—and many more—by providing useful and relevant information, the results of some thoughtful and comprehensive research, and a workbook to help you apply what you’ve learned.

Collectively, these resources will guide you step-by-step through the process of considering your own social media needs.

But first, a little background: “Social media” defines online media, like text, photos, messages, or video, that is social in nature. In other words, media that starts conversations, encourages people to pass it on to others, and finds ways to travel on its own. Why might this kind of media be useful to your organization? Quite simply, because of its growing popularity. Many other nonprofits are finding it to be an effective way to engage current supporters and reach new ones.

Like any communications technique, different social media channels have different strengths and weaknesses. It’s important to define your goals and identify your audience in order to see effective results. It’s also important to remember that social media channels are tools, not a finished product. Deciding which channels to use is just the first step. A Facebook page shouldn’t be the end goal of a social media strategy any more than a telephone should be the end goal of a communications plan.

---

The Decision Guide will walk you through a five step process:

1. Understanding Social Media
  2. Defining Your Goals and Audience
  3. Evaluating Specific Tools
  4. Choosing Tools to Meet Your Goals
  5. Creating Your Social Media Strategy
-

---

# Social media is online media that starts conversations, encourages people to pass it on to others, and finds ways to travel on its own.

---

This guide begins at a high level by walking you through the reasons for considering social media, then dives into a tool-by-tool look at what's available, how they're working for other nonprofits, and core considerations to keep in mind. Then it looks at the goals you may want to achieve through social media, how different tools can help accomplish those goals, and what strategies can help you find success. It winds up with a discussion about integrating a number of social media channels with each other—and with the other communication methods you're already using.

The final section is a workbook for you to use to apply what you've learned to create a social media strategy for your own organization.

This is the third edition of our Decision Guide. We've added new research on how nonprofit organizations are using social media to meet their missions, and updated our overview of key differences between the channels most often used by nonprofits to reflect their current functionality. We've also added sections

covering new and rising social media platforms. For much more on these, check out our report on *Exploring Cutting Edge Social Media*, released in May 2013.

We designed it to help you decide what channels are likely to be most effective based on your goals, audiences, staff time, existing resources, and your overall communications mix. Whatever you choose, you'll need to consider how to integrate the channels with your other communications in terms of tone, message, data, and policies. The ideal is to create a strategy to attract and engage supporters and keep them interested and informed.

Remember, social media is not just a means to distribute one-sided requests or missives: It's a conversation. This guide will get you started, but it's up to you to keep it going—conversations are two-sided, and if you want your supporters to hold up their side, you have to keep up with yours.

# ABOUT THE RESEARCH

Before we tell you what the research said, we want to tell you what we did—specifically, the research efforts we undertook to arrive at that information:

**2011 Facebook Survey:** In February 2011, we conducted a high-level survey to understand how nonprofits were using Facebook and what results they were seeing in terms of attracting new constituents and fulfilling common nonprofit objectives. The detailed results from the 505 nonprofit staff members who responded can be seen in our free report, *Using Facebook to Meet Your Mission: Results of a Survey*, at [www.idealware.org/facebook\\_survey](http://www.idealware.org/facebook_survey). From these respondents, we interviewed seven nonprofit staff members who were doing effective things with Facebook, as well as an eighth nonprofit not represented in the survey.

**2011 Twitter Survey:** In early 2011, we surveyed 69 frequent nonprofit staff members who used Twitter to understand how and if they use the tool to discover and take action with nonprofits.

The Methodology section of this guide includes the details for all of these research efforts, including older data that we've used to support our conclusions.

---

# WHAT IS SOCIAL MEDIA—AND WHY DO I NEED IT?

---

All nonprofits have long lists of things that seem like they might be worthwhile, if only they had time to devote to them. Creating a social media communications strategy often falls on that list. The key question for most nonprofits is not whether social media can be useful—clearly, it can—but rather, how useful, how much time and effort is it likely to take, and what's reasonable to expect in terms of a return on your time?

At your organization, you may already have asked where tools like Facebook, Twitter, blogs, and other social media channels fit within your long list of priorities. This Decision Guide is the first step toward answering those questions.

Social media is a fuzzy term that a lot of people use to mean different things. As we already mentioned, at Idealware we have a specific definition for it: online media (like text, photos, messages or video) that is “social.” In other words, media that starts conversations, encourages people to pass it on to others, and finds ways to travel on its own. We don't consider simply posting something on a blog to be social media until you encourage people to comment on it, link to it, or respond on their own blogs.

Social media often has two aspects. First, there's an important listening aspect that helps you hear what people are saying about you online—even if you don't have a presence yourself. Tools like Google Alert and Twitter Search can be very helpful in finding mentions of your organization or issues that are important to you. Feed readers like Bloglines or Feedly help you pull all these mentions into a single interface. Listening is a great way to start in the world of social media and develop an understanding of how it all works.

The second aspect—and the focus of this guide—is hosting conversations. Through tools like Facebook,

---

**“Social media is online media that starts conversations, encourages people to pass it on to others, and finds ways to travel on its own.”**

---

Twitter, or YouTube, you can post information, encourage comments, and get feedback. Remember the social aspect of social media, however: Simply putting up a Facebook page or sharing a video on YouTube isn't likely to do much good. It's important to think of these social media channels as tools to communicate in a social manner rather than the end in and of itself—in other words, social media is a journey, not a destination.

But what goals do social media techniques effectively support? Idealware has conducted more than a year and a half of research in pursuit of the answer to that question. What tools are working to what ends? With what effort? We've translated all of our research findings into actionable information to help you make the right decisions for your organization, but throughout this guide we've pulled out some of the key data from our research into “What Did The Research Say?” sidebars for those of you who want to dive into the details.

## Why Social Media?

Why should you consider using social media? Because a huge—and still growing—amount of people are already using it, and it may be a cost-effective way to engage supporters or potential supporters. Not because it's the "way of the future," because "every nonprofit should," or because "otherwise, you're missing a critical way to interact with your supporters." Unfortunately, there's a lot of hype, which makes it difficult to understand which tools are likely to be useful for you.

If you cut through the hype, though, you get a core tenet of marketing: If your audience is using a particular communication method, it might well benefit you to use it as well. Social media tools are becoming more and more mainstream, and more and more integrated into everyday communications. So at minimum, it's wise for an organization to keep an eye on their supporters' use of social media and how the tools are evolving, even if it doesn't make sense to use them now.

We're not going to say you need to be using social media—only you know your organization well enough to decide that. In fact, if you feel like you're not yet on a steady course with stable computers for staff members, a solid website, a usable way to track constituents, and a good broadcast email strategy, your organization might get more bang for the buck by concentrating on those areas instead. Don't abandon proven strategies like direct mail and broadcast email—social media complements them but does not replace them.

That said, some nonprofits are certainly finding social media useful. As summarized below, nonprofits are using a number of methods—especially Facebook, Twitter, and blogs—to effectively engage current constituents and reach out to new ones. If engagement and outreach are useful to your organization, give social media strategies some thought. You should at least be able to define why they don't make sense for you at the moment, if only to be able to fend off overeager board members and well-meaning volunteers.

Our research results support the idea that a number of nonprofits are finding at least some tangible success with social media. In our 2011 Facebook survey, over 70 percent of respondents had succeeded in bringing new supporters to their events, and 66 percent of advocacy organizations had gotten their Facebook fans to take some type of action, like signing a petition. In

our case study research, more than half of those investing time in these tools saw real results beyond simple fans or followers, like an increase in website traffic, substantive feedback, or new volunteers. (On the other hand, 19 percent felt they had not gotten any tangible results for their efforts.)

---

**"We have seen a lot of traffic going to our websites from both Facebook and Twitter. These have consistently been our largest traffic sources."**

---

All our research to date has shown that social media is not a great tool for direct fundraising, however. Individuals may have some success with fundraising from their own friends and family, but it's better to think of it as a way to engage and communicate with people than to ask them directly for support. Organizations are more likely to be successful thinking of social media as a way to distribute messages and start conversations. Our research is supported by newer findings. For instance, the software company Blackbaud commissioned a study of charitable giving across generations, published in August 2013, which found that only 6 percent of donors of any age had given through a social networking site. Nearly a third of Generation Y donors said that social media sites were extremely or very important means of staying in touch with the causes they support, though—they just don't give money through them. These figures have remained relatively unchanged since 2010.

All this means is that social media is like anything else: effective at some things, less effective at others, and your level of success depends upon how you use it and who you're trying to reach. So how do you sort through all these things? That's the purpose of this guide.



---

# DEFINING GOALS AND AUDIENCES

---

The tools you should use depend on what you want to accomplish and who you want to reach. Defining goals and audience is an often-overlooked step when it comes to social media, but it's a critical one. You can't effectively choose any communication tool without a specific understanding of what you want to accomplish.

The more specific the better. Many organizations enter the world of social media with goals too nebulous to measure, like "building awareness" or "spreading the word." It's useful to think of the acronym "SMART" when defining goals, which helps make them:

- **Specific:** They need to be detailed enough for you to determine whether you've achieved them or not. How will you ever know if you've finished "building awareness?"
- **Measurable:** You should be able to quantify goals with a numeric benchmark.
- **Achievable:** Make sure your benchmarks are realistic based on what you've accomplished in the past.
- **Relevant:** If they don't relate to your mission, it doesn't matter if you've achieved them.
- **Time-Based:** Define the timeframe over which you'll achieve these goals.

We'll talk in much more detail about SMART goals later in this guide.

It's also critical to know who you want to reach.

Potential major donors are often a very different audience than alumni from client programs, for example, and it's important to consider what they're using and what types of communications each audience expects from you.

Different tools have different audiences. Facebook tends to be better at reaching those in and right out of college using it for personal reasons, while Twitter is likely to be more useful to reach older professionals. But more than the demographics of a particular channel, you need to know what channels your supporters and potential supporters are using. How do you find this information? Try asking them. Talk to your staff, board, and supporters about the sites they use, or survey your community to find out.

---

# WHAT SOCIAL MEDIA TOOLS ARE AVAILABLE, AND HOW MIGHT THEY HELP

---

## FACEBOOK

With more than one billion users worldwide, Facebook is generally the first site that comes to mind when you hear “social media.” As more people use the site to stay in touch with one another, many nonprofits have launched Facebook Pages to reach supporters using the site. But like any online communications method, Facebook takes time to use effectively (about two-to-four hours a week, in fact, but more on that later). Is it worth your time? How much of it? Those aren’t easy questions to answer.

First off, a quick description of Facebook for those unfamiliar with it. The widely used site (according to company statistics, 665 million different people log in to Facebook each day) helps people keep in touch with extended groups of friends and family. Each person creates and maintains a profile and can post updates—including photos or videos—of what they’re doing or thinking. Their Facebook “friends,” or people in their network, automatically see those updates and can comment on them, making for a great way to keep up with friends without much effort.

Nonprofits can create a Facebook Page to allow people to follow their organization in the same way, and post updates, links, conversations, photos, videos, petitions, or even collect donations online. Facebook users who choose to “like” your organization—essentially, list themselves as fans—see updates without needing to navigate to your page, and can get involved in discussions with other supporters. It’s a way to bring your message to your supporters rather than trying to bring them to you.

As the research shows, Facebook—perhaps alone among the social media channels in this guide—is worth thinking about for the sole reason of having a presence there. Heavy users, already a growing

segment of the population, turn to Facebook as a reference site—almost like they would a website. In fact, Facebook has recently rolled out Graph Search, a new means of searching the site that’s meant to make all the information contained within Facebook more retrievable. It’s worth thinking about creating a Page simply to ensure that people looking for you can find you. That said, a page with a lot of fans seems considerably more effective, so you’ll need to devote staff time to managing and maintaining the page to maximize its effectiveness.

While Facebook continues to reign supreme in social media user base—two-thirds of American adults had an account on the site as of February 2013—it is slowly declining among younger users. With parents and even grandparents now joining Facebook in droves, the site is losing its edge as an exciting tool for self-expression and socialization for teens. While many teens are still on Facebook, they primarily use it more for regular communication and are less concerned with checking for new pictures, videos, and stories.

Many nonprofits that do devote the time, though, have also seen specific benefits. A substantial number have seen Facebook drive traffic to their websites, increase event attendees, and provide some help in building an email list. The Facebook comment functionalities can help you receive feedback from constituents and foster discussions, and Facebook has also recently adopted hashtags within comments to keep conversations going, too. (See the Twitter section of this guide for more on hashtags.) Facebook can also help with reaching out to new constituents, through specifically targeted ads.

## What Resources Are Required?

Facebook itself is free for any organization to use. The only resource involved is staff time—which isn't to be taken lightly. It's a complex site for those unfamiliar with it. Creating a Page might take some online research and experimentation. If you haven't created a Facebook page for an organization before, plan for about eight-to-16 hours upfront to understand what's possible on Facebook, define a strategy for your organization, and launch a page. Once you're up and running, try to engage people with your page. Start with outreach to current supporters and staff members' Facebook friends to encourage people to "like" your page. At the same time, though, make sure you post interesting updates (for instance, what's happening at the organization, interesting items from the news, new photos, events, questions, or conversation starters) so there's something to see on your page when people visit.

Once you've gotten the page up and running, how much time should you plan to spend updating your page? The average organization Idealware surveyed in the past spent about two-and-a-half-hours each week managing its Facebook site (though a few spent considerably more). This includes posting updates, answering questions, and doing additional outreach. Those who had seen substantial success with Facebook accounts (for instance, attracting new volunteers, event attendees, or substantial website traffic) averaged three-and-a-half hours per week, although it's not clear if the extra time contributed to their success or they devoted more time because it's more successful.

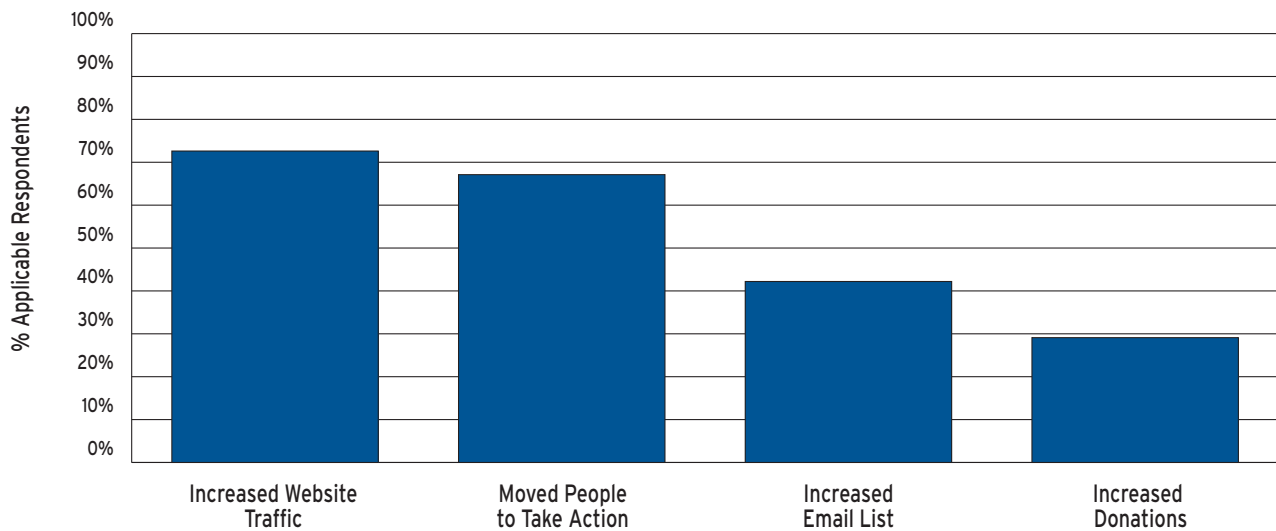
Put aside at least two hours a week to manage your Facebook page, and plan to post several times per week. Facebook users expect Pages to be frequently updated—a page that hasn't been updated in two weeks or more seems essentially defunct from a Facebook perspective, and is likely to do you more harm than good.

Videos and photos on Facebook generally are more popular than text-only updates or link shares. Third party social media tools allow you to easily share content on Facebook to further engage your Facebook following. The mobile photo sharing platform Instagram was acquired by Facebook in 2012, and the tight integration between those two tools makes photo sharing on Facebook easier than ever before. You can also upload videos with a single click.

There have even been campaigns based solely around shared images via social media. For example, the American Cancer Society's Tag2Nag campaign was based around images that Facebook users could tag their friends in to remind them to get screened for colon cancer. The images were often humorous, but didn't stray from the necessary call to action, and a reminder of the American Cancer Society. This was effective in that it was a lighthearted way of getting social media users talking about a challenging subject.

## WHAT DID THE RESEARCH SAY?

In our 2011 Nonprofit Facebook Survey, we asked respondents about quantifiable results like website traffic, donations, email list size, people moved to action, and advocacy actions. Respondents reported the most success using Facebook to direct new people to their websites—almost 300 reported “some” or a “substantial” increase in web traffic attributable to Facebook. Survey respondents interested in moving people to take some form of action for a cause, like signing petitions or other advocacy actions, also reported more success than failure—66 percent achieved moderate to substantial results.



Organizations reported less success using Facebook to attract donations. Just 29 percent saw an increase. Several interviewees mentioned the difficulty of fundraising on Facebook, reporting either that they've found it to be not useful at all or that it takes a long time to develop donors on the site. Surprisingly, just 42 percent of respondents reported an increase in their email lists that they could attribute to Facebook.

## Getting Started with Facebook

Facebook has the potential to be an important part of your online presence. A 2013 study commissioned by the software company Blackbaud found that half of Generation Y donors and close to 40 percent of Generation X donors have shared about a charity on Facebook, suggesting that the platform is an important place for supporters to convene.

If you've decided that Facebook is a good fit for your needs, start by setting up a page for your organization. Figuring out how to do this isn't terribly intuitive—for detailed instructions, John Haydon provides a great video at <http://johnhaydon.com/2010/06/how-to-set-up-facebook-page-admins/>.

As we've already discussed, it's important to try to get some people to “like” your page to establish critical mass. Ask your staff and core supporters to “like” you and to invite their personal friends to do the same. Include a mention of Facebook in other communications, like eNewsletters or websites.

As you get up and running, plan out the first few weeks of posts and decide how you'll get people to interact—maybe even going so far as to ask close friends of the organization or staff to actively reply to your initial posts to show a sense of community. This will also help demonstrate to Facebook that your page is active, which makes it more likely that your posts will be chosen for display on the walls of those who have “liked” your page. Once you've established some supporters and written a few posts, the hope is that you'll start to reach your friends' friends—and then you can start to implement tactics to meet your particular goals. You'll have to continue to promote and reach out about your Facebook page if you really want to gain momentum.

Facebook also has an official Page for nonprofits on Facebook, which has some good strategy tips, inspiration, and other resources. You can find it at <http://www.facebook.com/nonprofits>.

Love-A-Stray doesn't have a physical shelter, but promotes the strays up for adoption on its Facebook page. Content tip: pictures of cute animals score big on Facebook.



Twitter poses a conundrum for many nonprofits. If you've never used it before, it's difficult to understand how it might be useful from an organizational perspective... not to mention that it's just one more thing to add to a to-do list. But our research shows that nonprofits are finding value in it, especially in reaching out to new audiences.

What is Twitter? It's an internet-based service that lets you create a (minimal) profile for your organization and send out a stream of short messages called "tweets"—updates about what you're doing, conversation starters, requests for help, or links to resources of interest. Messages are limited to 140 characters or less, the maximum length of a text message on many phones. As that would imply, many people send and receive tweets on their cell phones. You can also use the Twitter.com website or an app on a mobile device. Many people use specialized applications, like TweetDeck or HootSuite, that allow much more sophisticated management of incoming and outgoing tweets.

People can choose to "follow" your tweets, which is like subscribing to your feed, and if they particularly like one they can "retweet" it—post it again so their own followers see it. It's in retweeting that much of the power of Twitter lies. If you post something interesting that's retweeted exponentially, you can reach a huge amount of people very quickly.

You can also use "hashtags" (the # symbol, known as "pound," "hash," or the number sign) to precede a keyword to try to reach a certain group. For instance, including the #npotech tag will flag your post as relating to nonprofit technology and make it more likely to be seen by those following #npotech tweets. It also provides a hyperlinked quick search to find other tweets with that hashtag. The hashtag concept has proven so popular that it's actually spread to other social media platforms, like Facebook and Instagram.

A lot of people use Twitter—the site claims more than 200 million active users as of February 2013, and it's becoming more widely used among the general public, too. The Pew Research Center's August 2013 figures estimated that 18 percent of Americans use the platform. It's gotten a lot of publicity for its involvement in political movements, too, as in the Arab Spring protests of the past several years. Twitter remains an interesting

way to reach media, partners, and potential volunteers.

It requires a different mindset than something like email. With an email inbox, people typically parse through their messages one by one, but Twitter users are more likely to just dip into a stream of passing tweets and ignore others when they move on to something else. They're also likely to only be actually listening to a small percentage of the people they are actually "following," our research showed. In practice, this means you're essentially posting messages into the ether. Someone may be listening, but it's difficult to understand who—or how many—they are. Think of it like broadcasting your message every three hours on NPR—you certainly won't reach everyone in the world, and you won't even reach every dedicated NPR listener unless they listen 24 hours a day. But you might reach some of the right people, and if you broadcast often enough, most people who are paying attention will hear you sooner or later.

As discouraging as this may sound, nonprofits are nonetheless finding Twitter useful – interestingly, though, in different areas than other social media channels. Organizations reported successfully using Twitter to connect with like-minded organizations and media outlets. Twitter also appeared to be useful for advocacy organizations, allowing an organization to provide near-real-time updates of a rally or current event to followers, or coordinate a decentralized group in real-time. Twitter is also popular during conferences and meetings, where attendees "live-tweet" thoughts and impressions to connect with others in the room and those following remotely.

### What Resources Are Required?

The organizations in our research spent on average about one-and-a-half to two hours a week maintaining their Twitter accounts. Twitter is somewhat more forgiving than Facebook or a blog. The general expectation is that users will post several times a day, but people are less likely to notice if you skip a day of tweets than if you skip a week on Facebook, or a month of blogging.

That's not to say you can afford to not post regularly. Make sure you leave yourself time to read other



people's tweets as well, to learn what people with similar interests are saying. It's good practice to make sure you retweet other people's posts and to make sure at least half your posts are not self-promotional—followers will become less interested if you're not holding up your end of the conversation. And retweeting is actually a quick way to provide valuable resources to your network. You can also "favorite" tweets—essentially the equivalent of the "like" button on Facebook, albeit less public.

## Getting Started with Twitter

As we said, posting to Twitter can be like posting into the ether—so how do you get anyone to even know you're saying anything? First, set up your account—which is as easy as creating a user profile—and post a few interesting tweets just to have something visible when people start to check you out. Then, find and follow a number of people in your topic area and commu-

nity—there's a Twitter ethic of following the people who follow you, so you can start to build a following that way. However, as the research shows, only some of those who follow you are likely to actually listen.

Once you've established that base of followers, promote your account by reaching out to the Twitter community through hashtags and by responding to particular tweets that seem relevant. For instance, post a good resource in response to a question, and include a relevant hashtag or two. If it's interesting enough, people are likely to check out your account and start to follow you.

For more details about starting and maintaining a Twitter feed, see our case study of our own Twitter use at <http://www.idealware.org/articles/reaching-out-wide-audience-twitter-case-study1>.

While @BronxZooCobra got more attention for a little bit, The Bronx Zoo uses its Twitter feed to promote zoo news and activities. Note the custom background that ties into the organization's branding.



Many nonprofits struggle with the idea of an organizational blog. Some social media consultants suggest that every nonprofit should have one, but our research shows many nonprofits that blogged found only limited success.

What is a blog? Essentially, an online site where one or more people post fairly frequent updates about what's going on in the organization, told from a personal perspective. Technically, it's not that different from a website, but the structure and tone tends to differentiate blogs—posts are often short, appear in reverse chronological order (newest first), and are almost always written in the first person. Typically text-based, they can also include photos or videos.

Blogs are particularly useful for publicizing your organization's expertise on a topic in your issue area (for instance, your child safety organization has several folks who are knowledgeable about hazards for kids). This can be a useful way to educate your constituents, or promote your cause. Blog posts are generally less time-consuming than an article or report, and are written in an informal, conversational tone. If you're less concerned with educating, a blog can engage your constituents by telling a story about your work, the difference your volunteers have made, or just a behind-the-scenes look at your organization. Ultimately, whatever way you use your blog, it will help promote your website and online information. Blogs are great content for search engine optimization, making your organization (and hopefully your website, if you link to it from your blog) easier to find by search engines.

Blogs can be helpful if you have staff members or volunteers who can eloquently—and relatively frequently—advocate for your cause, tell stories about how you're serving your mission on a day to day basis, or engage people. However, not that many nonprofits have experts or advocates on the front lines who are also good writers, so the blog becomes one more thing for a communications team (or person) to manage. If you don't have clear goals that suggest a blog would be particularly useful, and you don't have committed writers available to blog, it might not be a good channel for you.

Because blogs are public, it's obvious when you don't post. A blog started and then abandoned, or updated only sporadically, is worse than no blog at all, so make sure you can commit before beginning one.

### What Resources Are Required?

Typically blogs are updated at least once a week—you might be able to get away with less if you're consistent about when you do post. On the other hand, some blogs see multiple posts per day, so it's unlikely that people will feel you're blogging too often.

Our research showed nonprofits that blogged spent about three hours a week doing so. Those with more active, successful blogs devoted four to eight hours per week. This includes not only the actual writing, but time spent following other related blogs, generating topics, and responding to comments.

If you start having significant traffic, you'll also need to put some energy into monitoring and moderating comments to catch both the irrelevant and the inappropriate. More-popular blogs tend to attract substantial irrelevant comments aimed at promoting products. Some are obvious Spam and can generally be automatically filtered; others are actually posted by people and will need to be moderated or deleted manually. You should also have a policy to determine when comments cross the line, and how to react, though most blogs have considerably more trouble getting anyone at all to comment than with negative or inflammatory comments.

A blog doesn't have to be a one-person job. Multiple staff members could each have a commitment to blog twice a month, spreading the workload. Or you could ask volunteers to blog—for instance, perhaps part of the commitment volunteer tutors make is posting about their experience. Or consider inviting a number of well-known people in your field to blog for your organization, making it a hub of conversation about your issue. Don't forget, though, that with many of these models, you've merely substituted time managing other people who are supposed to write for the time you would spend writing, so it doesn't necessarily save you any time.



## Getting Started with a Blog

To start a blog, the first thing you'll need is a blogging tool. TypePad, WordPress, and Blogger are inexpensive and relatively easy to set up if you're even just a little technically adventurous. Write and post a few items to being with, just so there's something there when people visit, and then start promoting the blog. How? Advertise particular posts through existing communication channels—sending out a “best of the blog” email can be a great way to spread information to a wider audience. Look for and read other blogs on related topics, and start conversations with those bloggers. Link out to their blogs on your own—often, other bloggers will reciprocate if your blog contains interesting and relevant information.

## Tool on the Rise: Tumblr

Tumblr is a microblogging platform with a majority of users under the age of 25. While it looks like a traditional blog, it works in a more social way. Users can share their own content as well as follow, like, and repost the content of others. Short content seems to work best—brief bits of text along with photos and videos are the most popular types of posts to share. Tumblr pages can also be customized to an extent, and offer a variety of features to help tie in your organization's branding. There's also a popular mobile application that allows users to post and read the blogs they follow on the go.

YouthOutlook.org uses their blog to publish journalistic pieces, videos, and interviews by its youth contributors.



A growing number of nonprofits use websites like Instagram, Flickr, Picasa, SmugMug, or PhotoBucket to share photos. People like to see photos, and will often click through to see one when they wouldn't bother with a story.

While Flickr has had a troubled past, it continues to reign supreme for users seeking quality free photo hosting. Flickr began as one of the earliest successful social networks, but when it was bought by Yahoo! in 2006, a number of changes were rolled out which alienated Flickr's existing user base. Most of these changes have been rolled back. For instance, Flickr users can once again login to the service with Google and Facebook accounts as well as with Yahoo!.

Photos on Flickr are well categorized, so it's an appealing option for nonprofits who are hoping more people will find their photos by chance. Photos can also be organized into albums, which make it easy for visitors to find what they are looking for. You may also have boards which other users can add to, which can be a great way to collect resources, such as photos from your events, or even just pictures of your staff and volunteers.

Nonprofits can apply for the Flickr for Good program through TechSoup, which donates Flickr Pro memberships to worthy organizations. The pro membership, which normally costs \$24.95 per year, allows users to upload unlimited photos and gives you more information about your accounts statistics, as well as the ability to share 90 second clips of high definition video.

Photobucket is similar to Flickr in terms of features, but offers a stronger mobile application. It's a compelling option if you plan on uploading many photos onto the web from mobile devices. However, it does not offer Flickr's in-depth searching and categorization options. Photobucket also runs the free TinyPic service, which can be used without an account to quickly make images from your desktop properly formatted for the web. Additionally, dedicated photo sites like Photobucket allow you to easily embed your photos on your website, in emails, and on other web forums.

Most of the nonprofits we spoke to in our research use such sites primarily for internal or straightforward photo-sharing. Because these sites make it easy to post

digital photos online, they're handy for sharing pictures among geographically distributed staff, or posting pictures from an event or the field for constituents to view. Even better, most of these sites make it easy to pull the images into your website, blog, or Facebook page—for instance, your website's "Events" page could automatically pull three random photos out of your event photos on Instagram to show each visitor.

Some nonprofits are also experimenting with using these sites in more "social" ways that better meet our definition of social media—for instance, for collaboration and community building. Photo-sharing sites like Flickr have a number of cause-related group photo pools where like-minded people and organizations can share photos with each other. This sort of collaboration can lead to discovering new potential partners and supporters. Many sites let constituents comment on photos (though in our research several organizations mentioned that people are more likely to comment on a photo on a Facebook page than on a site like Flickr). "Tagging" photos—associating keywords or keyword phrases with them—is another useful way to let people outside the organization easily find or submit photos. Having constituents tag photos with a keyword for your event makes it easy for people to view all those photos in one place.

Not all of your constituents and supporters will want to be photographed or have their pictures posted to the internet. The same goes for people in a crowd. While you may not need people to sign releases, you should never post a picture of someone without first obtaining permission to do so. (For more on issues of privacy and security, turn to the Policy section on page 48.)

### What Resources are Required?

The photo sharing sites are free to use—obviously, you'll need some photos, but once you have them it only takes a few minutes to post them. Maintaining a continuing presence on these sites is not as important as on many other social media sites, so you could potentially use them only for particular events or purposes. For that reason it's difficult to assess the amount

of time required. You could post 10 photos from an event in less than half an hour, but consistently keeping up a stream of photos to catch attention and build a particular group could take an hour a week or more. Plan your time based on your specific use of these sites.

## Getting Started with Photo Sharing Sites

Setting up an account with Instagram, Flickr, Smug-Mug, or PhotoBucket is a straightforward process, and typically as easy as creating a login with a user ID and password. Then, browse to find your photos on your computer, upload them to the site, tag them, and distribute the link. If you have a lot of photos to load, many tools have bulk upload tools to speed the process.

## Tool on the Rise: Instagram

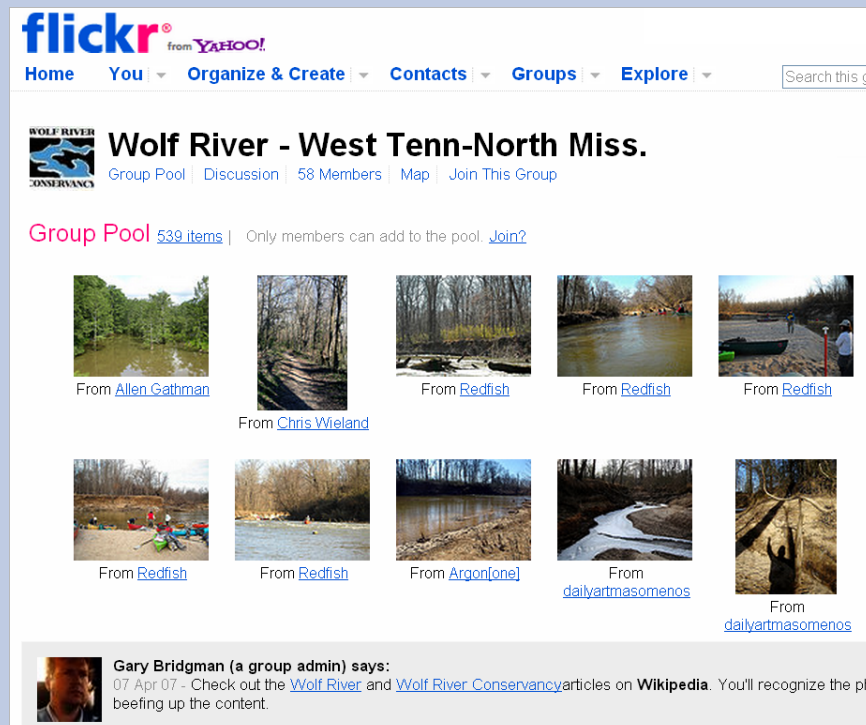
Users share pictures taken with the smartphone-centric Instagram application, and that photo-sharing is at the heart of the social tool—an Instagram page

without a steady stream of photos simply isn't an Instagram page. While beautiful, unique photos are great to look at, nonprofits don't need to share works of high art to make use of this tool. The artistic filters and square frames Instagram is famous for make even mundane photos look interesting. A few photos of your office, events, and volunteers working hard, or even full-blown visual campaigns based around Instagram, can be great to share.

Though usually described as a photo sharing application, a Nielsen study showed more than one million teens visited Instagram during a one month period to stay in touch and form a deeper relationship with the things they were passionate about. Instagram is a great example of how social media tools can be used in unexpected ways by select groups of users. People on Instagram can search for photos and users simultaneously using hashtags, so it can be a great way to connect with people who have shown previous interest in your cause.

Facebook acquired Instagram in April of 2012, partly as a way to reach defecting younger users. While Facebook has yet to integrate or alter the application in a

An example of a Flickr group, sponsored by the Wolf River Conservancy. The conservancy uses the group to encourage constituents to photograph the Wolf River and post their images. If you were an environmental nonprofit in West Tennessee, it could be useful to get involved with this group and engage the folks dedicated to photographing the Wolf River.



significant way, it can be a great way for organizations with a strong foothold in Facebook to share photos across multiple platforms and increase engagement with a younger crowd.

## Tool on the Rise: Pinterest

To the uninitiated, Pinterest, like Instagram, seems to be a way to share photos, but is much more than that—it's a way for people to put their passions on display and to be inspired by the content of others. In this way, it can be very advantageous to nonprofits.

Pinterest streams links in a visual way. Pictures and images get shared and adopted by other users who pin them into their pinboards, which are collections of inspiring or interesting content organized by category. You can also choose to “like” a pin, which can be a good choice for miscellaneous content that doesn't fit

in with any of your pinboards. You may also opt to have an open pinboard which any of your supporters can pin to, like a board for event photos.

It's a good idea to have your own content link back to your own website, and to use hashtags and descriptions that people might search for. Users can follow your entire organization, or just one pinboard in particular, to get updated whenever you post new content. However, you are also expected to share other people's pins, which is what keeps the Pinterest community going. When you repin something, you should follow the user that created it. This can be a good way to not only get new, relevant content, but maybe new followers in return.

Videos can be compelling, whether you use them to tell the story of your work or to educate people about your cause. With the advent of sites like YouTube, Vimeo, and low-cost Flip-style digital video cameras, video is becoming more and more attractive to nonprofits. A number of nonprofits have found that including a video as a part of a fundraising campaign can provide a boost to the appeal. Others are creating videos to educate advocates or clients. YouTube itself is particularly widely used—the website boasts over 490 million users, and of the 12 nonprofits that provided case studies about their use of video sites, all but one were using YouTube exclusively.

As with photo sharing websites, however, the majority of the nonprofits in our research were using these sites primarily as a way to easily upload and share videos—in other words, as a straightforward communications channel, one that doesn't quite fall within our definition of social media. For instance, organizations that already have videos, like a public service announcement or short film made for a gala, can easily upload them to YouTube and send the link to supporters or embed the YouTube video into their websites to make it available to all visitors.

Video-sharing can be used in many different ways, including:

- **Encouraging conversation around videos.** YouTube allows anyone to comment on any video. Those we spoke to had a mixed reaction to the comment quality, however—some found they were random and rarely thoughtful, though some said they were able to spark useful conversation among constituents.
- **Spreading the word.** People like videos, especially short, entertaining ones. If you have such videos, try asking supporters to pass links to them on to friends and family, which also spreads your message. This could be as simple as asking performers to send around a video of your previous show to encourage people to buy tickets to your next one. On the other end of the spectrum, large nonprofits sometimes try to frame a core message or educational goal into a funny or entertaining short video with the hope that people will pass it around for its entertainment value (like “the

Meatrix,” a spoof of the Matrix that GRACE used to illustrate factory farm conditions). The hope is that the video will go “viral”—that many people will each pass it on to more, creating exponential growth and wide visibility. In practice, however, it's hard to predict what videos will go viral—not even experts who spend tens or hundreds of thousands of dollars on videos can get more than 30-40 percent of them to go viral.

- **Asking constituents to vote your videos up.** On a related note, you could also ask supporters to “vote your videos” up on a site like YouTube. Those that are viewed and liked by a lot of people are more likely to be shown on category pages, or even the homepage, creating more views—and potentially even more visibility.
- **Asking supporters to provide videos.** As video cameras and editing software become more and more affordable, it's possible your supporters have the tools and interest to create videos themselves. Perhaps they're willing to send in their videos to build a repository about your cause.
- **Hosting a video channel.** If you have access to a lot of video, or interest in compiling video about your issues, it's possible to create a “channel” of videos. Channels feature videos you choose grouped together on one page. Typically you keep them updated over time to feature the latest videos related to your topic, so be sure to put time aside to find and include new videos.
- **Experimenting with short videos.** Mobile applications like Vine and Instagram Video make short, looping clips more accessible, and let you record and share short videos yourself, usually on a smartphone.

### What Resources are Required?

YouTube and most other video sharing sites are free. In fact, you can apply for a nonprofit-specific YouTube account, which provides more features—such as the ability to add clickable asks on top of videos—and lets you upload longer videos.

The amount of time required for these sites is harder to define. It depends on what you're planning to do.



The most straightforward approach is to set up an account and upload a video—it's easy, and takes less than an hour, even if you don't have any experience with the site. Make sure to check in at least a couple of times a week to read and respond to any comments. If you're hosting a video channel, or want to keep up a continuing stream of videos, the time commitment is likely to be similar to any social networking channel—two hours a week or more.

Keep in mind, of course, that this doesn't include creating the videos themselves. Making watchable videos require at least a basic set of skills, and editing them can be much more time-consuming than you think. It's possible for someone with video experience to whip together a short, informal video in an hour or so, but polished videos often take days, if not weeks, to create. Developing and executing a concept that both entertains and educates, as is often desirable for a viral video, could take months.

## Getting Started with Video Sharing Sites

YouTube and Vimeo have both been around for some time, and each offers users slightly different features. With YouTube, you have the opportunity to get a lot more viewers, but your organization is also competing with lots of other content. Vimeo is designed for artistic content rather than home movies or humorous content. There's a smaller—but more engaged—user base compared to YouTube. If you need a simple

means of embedding videos on your website and through other social media channels, Vimeo might be a compelling option as it offers a clean, modern interface.

Videos shared on either service can help you raise funds. Vimeo has a built in donations function in its “Tip Jar,” which allows users who want to support your cause to donate right below the video. Vimeo also has pay to watch features, where viewers can pay a select amount to see your content, however this feature requires that you have a Vimeo Pro account, which costs \$199 per year.

YouTube offers a number of monetization options by adding advertisements before your video, but YouTube also offers a program specifically for non-profits. Users must apply for the YouTube Nonprofit Program, but being accepted will give you access to a number of well implemented features, like a donate button, and a call to action overlay. Invisible People, an organization which creates video campaigns to help the homeless in America, has had great success in gaining the funds needed to help housing and food programs, both in the way that the videos can be shared across social media, and in gaining donations directly from the videos.

Like photo sharing sites, you can use a video hosting website simply to put up videos when you have them—or, to create a “channel” over time. Creating an account is easy regardless of the site—for YouTube, which is owned by Google, you simply

Repower America, an advocacy organization for clean energy, features video prominently on its website. The centerpiece of the homepage is a massive, interactive mosaic of embedded videos, featuring activists and community members discussing environmental and energy concerns. There are videos and photos from all 50 states and visitors to the site can upload their own videos to the website.



need a Google account. Then, upload video up to 10 minutes in length. Most modern video cameras and editing equipment will export in a format that can be uploaded to YouTube, but if you have trouble, the site offers extensive help. If you have a lot of videos, or want to showcase others, consider creating your own channel.

Google also provides a non-competitive grant program to let most nonprofits access additional YouTube features, like the ability to upload longer videos, to

overlay links on top of videos (like a call to action for people to donate), or to be listed on the Nonprofits page. It's an easy grant to apply for, but it can take months to hear back.

For tips on creating a video start-to-finish, and an overview of best practices for shooting and editing, check out Idealware's free diagram, *How To Make a Gorilla Video* (<http://www.idealware.org/gorilla-video>).

Having recently surpassed 225 million members, LinkedIn is becoming more prevalent for skill-based networking. A LinkedIn profile is essentially a resume. People describe their work history and skills, and can include educational background, references, associations, and more. Each person can request to link their profile to other people they know—when you link to people you see their profiles and the entire list of people they know. LinkedIn has two sides: on one hand, it works somewhat like Facebook, with groups for professional networking; on the other, it's a useful place to search networks to find potential contacts and new friends.

Because the site is targeted at professionals interested in networking, LinkedIn is likely to be of particular interest to groups whose mission is to support people in their jobs (like an association of nonprofit executive directors, for instance) or who have a focus on careers, specifically in particular groups (like a “young professionals” group). As an organization, you can create a LinkedIn group for people to join. Hosts or members can hold discussions, post resources of interest, or create a job board. Like most other social media channels, starting conversations is key to having a successful LinkedIn group. Members can also ask questions posed not only to group members, but to their contacts as well, essentially tapping into an extended network of people.

LinkedIn also provides an interesting way to look for connections to people your organization might want to meet. If you're looking for new donors, staff members, volunteers, or board members, especially those with specific skill sets, consider LinkedIn as a recruiting tool.

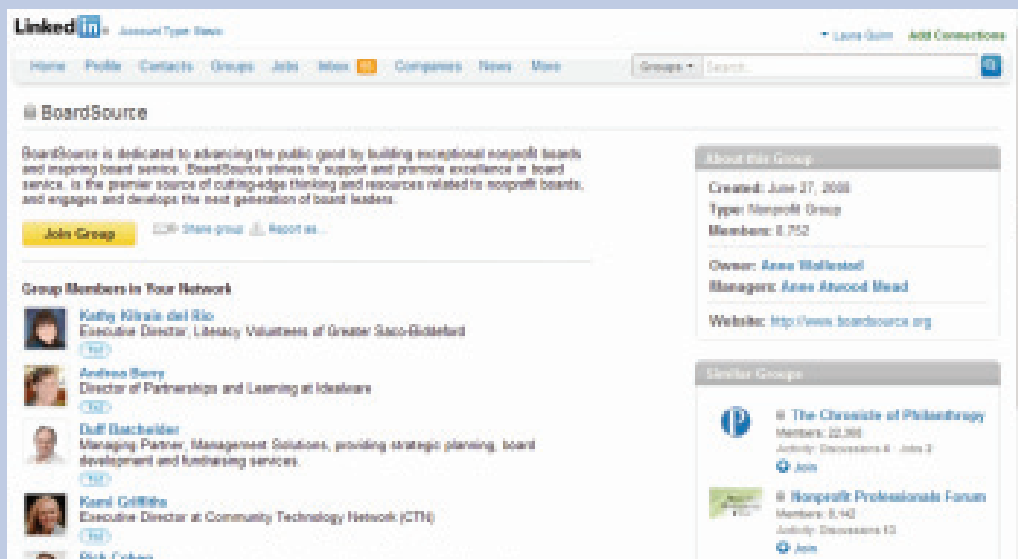
Because you can see all the LinkedIn contacts for each of your group members, it can be straightforward—if time-consuming—to look through each person's connections to see if there's anyone to whom you'd like an introduction. This makes LinkedIn a resource for networking with like-minded organizations as well—for instance, foundations or other organizations who may have an interest in supporting your organization. LinkedIn also offers recruiting solutions, and has now started discounting them somewhat for nonprofits. LinkedIn offers service in China, which can be a good method of outreach to that country without using a dedicated service.

## Getting Started with LinkedIn

If you've decided that LinkedIn is a good fit for your needs, start by setting up an individual profile page for yourself. With your own page created, build a company page for your organization—the LinkedIn Learning Center has setup instructions for nonprofits here: <http://learn.linkedin.com/nonprofits/>.

Much like starting on Facebook, it's important to get people to connect with your LinkedIn page. Staff, core supporters, and their personal friends can help you establish critical mass with your organization's network. Encourage your staff members to create a profile and then participate in LinkedIn conversations. Like with other social networks, remember to include a mention of your LinkedIn presence in your eNewsletter, website, or other communications.

BoardSource, an organization that helps nonprofits build effective boards, has a lively LinkedIn group that members use to share resources and have conversations. LinkedIn works well to help support the nonprofit professionals it works with.





### Geolocation and Mobile Applications

Does your organization have a public physical location, like a museum? Or do you do a lot of on-site advocacy or volunteer events? If so, place-based applications—social networking tools that track your physical location and let you easily “check-in” to tell friends where you are—could be worth exploring.

Geolocation applications are changing the way we live our daily lives, and they’re connecting people to causes in ways they never have before. Nonprofits can capitalize on these growing trends. These geolocation and mobile-based social networks can be a great way to engage with local supporters, and many do not require the substantial maintenance, responding, and updating of other tools.

### Foursquare

Foursquare has been around for a number of years, beating out tools like Whrrl and Gowalla in the geolocation market. With Foursquare, users “check in” at a particular location, and are sometimes awarded with incentives for doing so. Users can earn virtual “badges” for visiting a location or performing a particular action. Users can also unlock badges for performing a sequence of events, such as checking into four different museums in New York City. The user who checks in at a particular location the most times is called the “mayor” of that location, which unlocks an additional badge, and is posted for everyone to see in the Foursquare application.

Your organization can simply offer digital incentives that tap into the competitive element of Foursquare by awarding visitors badges for each visit, or a certain number of visits. Red Cross of America, for example, used a custom Foursquare badge as a way of saying thank you to supporters who donated blood, and as a reminder to donate again in the future. Remember, though, that you must create your own custom badges and have them approved by Foursquare. Typically, unique badges that will be unlocked frequently and offer real life incentives are the most likely to be approved.

You may also wish to thank your current mayor using such other tools as your Facebook page or broadcast email. This can increase competitiveness among your supporters and help you get more repeat visitors. You might consider offering real life incentives on Foursquare, such as giving whoever is mayor free admission to all of your events. The Taft Museum of Art in Cincinnati is using offers several Foursquare incentives, for example: for every five check ins, users can earn a free dessert, a guidebook on the museum, or even a free membership to the museum.

While encouraging users to check in at your events may not directly increase attendance at events, it can still be a great way to market events and your organization in general. Check-ins on Foursquare are shared across other social networks, so the potential for reaching a wide number of supporters with a single tool is high.

Beyond the traditional methods of engagement with Foursquare, some have used the application for program delivery in other ways. The University of Pennsylvania relied on Foursquare users for its My-HeartMap Challenge campaign. The idea was sparked by the goal to create an easily accessible map of automated external defibrillators across the city. While the organization did not have the time and resources to send out people to verify each AED’s location, they knew they could rely on crowdsourcing through social media to meet the goal.

Thousands of AED locations were submitted, and the two users who spotted the most were awarded \$9,000 each. Not only was the university able to create a nearly comprehensive map of AED’s in Philadelphia, it was successful in increasing awareness about AED’s, and engage with supporters locally. It plans on repeating the campaign in other cities across the country.

### Other Location Based Services

Even if you don’t have a physical location that encourages visits from your supporters, more traditional tools for businesses can help you gain perspective on your community’s thoughts on your organization. Having a presence on location-based review sites like Yelp, Around Me, and Google Places can help supporters

find your phone number, website, and office hours quickly from anywhere.

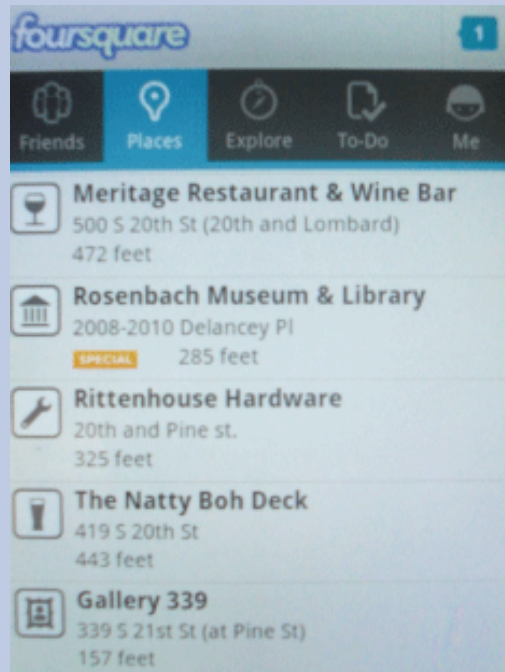
Encourage your volunteers and supporters to write reviews of your organization on these sites. Eventually you might receive feedback from the outside world, which could be positive or negative but will offer additional perspective on the public's view of your organization, and another opportunity to respond to criticism in an effort to change their minds.

You can also advertise offers and deals with many of these networks. You may already offer free membership for volunteers, or services for major donors, but advertising these incentives in an interesting way will make them more likely to stand out to more supporters.

## Getting Started with Place-Based Applications

Setting up your organization on a tool like Foursquare is a very straightforward process, requiring little more than your organization's name and address. Beyond that, there's little to customize or update, and you can almost just "set it and forget it." It doesn't hurt to tell your supporters that they can now check in when they visit, or think about offering a discount, but it's not imperative. People using these tools on their phones will find you in the list of nearby locations, and, in the case of Facebook Places, are already following you on the tool.

The Rosenbach Museum and Library has been using Foursquare and other place-based applications to enhance its brand as a technology-forward organization and to encourage people to spread the word. It finds that Foursquare provides an opportunity to thank and build a relationship with dedicated patrons."



There are a huge number of social media sites, and the options change over time—but not as quickly as you might think. They tend to change over a year or two rather than a month or two, so you will have time to consider and implement a strategy.

How do you keep up with what's available and what's changing? Try to keep an eye on the strategies used by large nonprofits and those covered in the nonprofit press. Wait to see what's working for others before diving in.

To help, we provide brief summaries below of some of the other tools that might be worth considering—some more niche-oriented, some just beginning to be of possible interest, and some already fading from interest.

### Google+

Google's social media offering has generated a lot of buzz. After a highly successful invite only beta period, Google released its social media service to the public in September of 2011. Since Google is such a big name, the initial hype surrounding it was enormous. New users clamored to it, as it was assumed that it would make all other social networks obsolete. Unfortunately, it simply could not live up to those lofty expectations. By 2012, users were spending a second on Google+ for every hour they were spending on Facebook. Additionally, several technical frustrations with the service eventually led to a decline in users, and caused many journalists to call it a failed experiment.

However, as of May 2013, Google+ had a total of 235 million active users in a given month, making it one of the most popular social networks in the world. Google continues to incorporate interesting features, such as being able to determine who sees what content, adding an animated profile picture, and integrating with existing Google apps like Google Hangouts to make it more appealing to users. However, the place for Google+ in the nonprofit social media landscape isn't yet clear.

### Niche Social Networking Sites

Facebook and Twitter attract huge general audiences. Your organization, on the other hand, may instead want to reach a niche group with a specific set of interests. It's worth taking a look at the world of niche social

networking sites—and there are hundreds to choose from, from BlackPlanet (targeted at African-Americans) to Goodreads (for book-lovers). You can find a useful list of niche social networking sites at <http://www.convertiv.com/niche-social-networking-sites/>.

These sites vary widely in functionality, but they all let you read posts that show what people in the community are thinking about, pose questions, and make comments. If you're going to use these sites, you're likely to have more success with a presence that continues over time rather than just swooping in suddenly to post about your event or fundraising drive. Think of them as conversation channels, like Facebook or Twitter, and put aside at least an hour per week per social network to actually read some of what's posted and have a conversation with the community. Otherwise, you risk losing audience—or never attracting it to begin with.

### Nonprofit-Specific Social Media

Can social networks be used for good? Certainly they benefit from population, but if you put over a billion internet users on the same website, can they drive social change? A number of tools are aimed specifically at the nonprofit sector with these goals in mind.

### Petitions

Get enough concerned citizens to sign in support of your issue, and you have a chance to make a difference. Years ago petitions made the jump to the internet, and now entire communities of like-minded people gather to create, sign, and promote them. Websites like Care2 and Change.org exist to facilitate new petitions, collect signatures, and achieve social, political, or environmental change, among other goals. Even the White House now offers We the People, a site on which any American citizen can browse and support petitions, or create their own, on far-ranging topics like gun control, internet privacy, and immigration, to more-wishful ideas like funding the construction of a Death Star and requiring congressmen and senators to wear their financial backers' logos on their clothing. Petitions are by no means a guarantor of policy change, but can generate wider public interest in your cause.

## Giving Portals

In recent years, a variety of “social middleware” sites have arisen—portals to connect potential donors with nonprofits. One of the most recent was the now-defunct Jumo, which has since merged with the GOOD community. More stable communities have persisted, including Causes.com, GlobalGiving, and Fundly. On these sites, nonprofits create public profiles users can search or browse based on interest, mission, or geographic region. The site itself takes online donations, but many require a monthly fee, and a small percentage of each donation.

## Crowdfunding

Crowdfunding is another fundraising tactic that can be of use to nonprofits trying to implement a specific project. Sites like Kickstarter and IndieGoGo let users create projects with a fundraising goal, and provide deadlines to meet them. Supporters donate in increments, typically from small amounts like \$1, \$5, \$10, and so on, up to donation levels in the hundreds. It's common practice to include some type of reward for each donation level as an added incentive to give—for

example, everyone who pledges \$5 or more will get a thank you card, \$10 or more gets a sticker, and more.

With Kickstarter, if you don't meet your goal by the deadline, you don't get the money. It operates on an all-or-nothing model—you receive none of the money raised if you fail to meet your goal—while IndieGoGo lets you keep what you managed to raise. Nonprofits may also look into sites like Crowdrise, which allow your supporters to create friend to friend fundraising campaigns for your organization.

The power of the crowd doesn't have to be limited to fundraising, however. Crowdsourcing can be used to collect data relevant to your mission from a wide geographical area. For example, supporters can collect water samples from streams near their homes or create electronic versions of historical records and other physical data sources or any information important to your cause. NGO Post, an organization based both in the US and India, for example, provides an online forum for individuals to share and discuss social welfare efforts and report on issues like arts and culture, education, or human rights.

---

# CHOOSING TOOLS TO MEET YOUR GOALS

---

*There are a lot of social media tools that might be useful, but you need to consider your own goals to determine what's likely to actually work for you. In this section, we walk through five of the most common high level goals—fundraising, advocacy, recruiting and engaging volunteers, supporting events, and outreach—to talk through how social media might support them.*

## FUNDRAISING

As a free way to access a large population of potential supporters, social media seems like an attractive platform for fundraising, but nonprofits are finding it difficult to convert their social media followers into donors. The social media audience is, in general, a casual one. They're there for fun and socializing, not to be asked for money.

---

**Social media is best used to support or promote your bigger fundraising campaign, as opposed to trying to fundraise through social media alone.**

---

Social media can be a useful addition to your existing fundraising strategy, however, supplementing your events, email, or direct mail appeals. Social channels are also a good place to build new supporter relationships, move supporters “up the ladder” and thank them for their donations. And while it's likely best to avoid making frequent donation requests through social media on your own behalf, tools like Facebook and blogs can be a great way for your supporters to reach out to their own friends in a personal fundraising appeal to support your organization.

### Promoting Existing Campaigns

Social media is best-used to support or promote your bigger fundraising campaign as opposed to trying to fundraise through social media alone. For instance, you can use photos and videos on social sites to entertain or inspire your supporters or use blogs to tell longer written stories. Videos allow more extensive content than Facebook or Twitter alone, which makes them ideal for telling detailed, creative and engaging stories about your organization.

### Moving People Up The Ladder Of Engagement

Sharing pictures, videos, and blog posts on social networking sites is also a good way to “break the ice” with new supporters. Illustrating the work you do can attract people already sympathetic to your cause, while a compelling story may convince those unfamiliar with your cause to take notice. Here the goal is not the donation, but engaging new people in the discussion. Once new supporters notice you, they will hopefully be interested in learning more about your organization and becoming more invested in your mission.

Publicly thanking donors using social media tools and showing the work that their donations support can also be a great relationship-building tool. Not incidentally, thank-yous also show potential donors the amount of support you have from others, and encourage them to join in.



## Using Tools Live At Fundraising Events

During a gala, walkathon, or other fundraising event, your donors and participants could use social media to discuss the event with their friends. For example, you could set up a “Facebook table” with laptops where attendees can post to their friends when they make donations, or just share info about the event. In a walkathon setting, you could use Twitter to live-blog from your accounting room, letting your online supporters follow the progress to your fundraising goal. This could also motivate people to make last-minute donations online or in person.

## Social Media As Friend-To-Friend

Social media channels like Facebook are excellent platforms for friend-to-friend fundraising, also called group or distributed fundraising. In its most basic form, this is simply enlisting your current supporters to invite their own friends and family by email to donate money to an organization you support. Many organizations have engaged supporters to raise

funds on their behalf through walk-a-thons or offline events, including everyone from staff and volunteers to program participants and current donors. Now, online tools like Causes.com or Razoo and popular crowdsourcing tools like Kickstarter and IndieGoGo readily integrate with Facebook and other channels, making it easy for your supporters to share a campaign with their friends. For instance, a Facebook “birthday campaign” is a popular way to encourage personal friends to give to a cause in honor of their own birthday.

## Finding Potential Donors

Some social media channels can be used for less-direct fundraising efforts. Browsing networks for and friending other organizations, foundations, and potential donors may not immediately result in donations, but can build relationships for the longer-term. For example, LinkedIn provides tools that make it easy to see who in your network might know a major donor or staff member at a local bank or foundation that you'd like to approach.

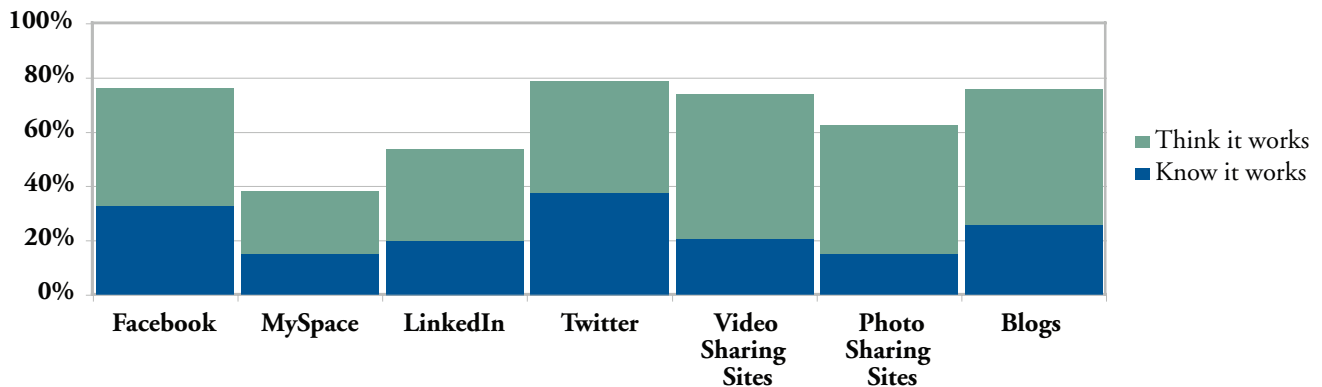
House of Charity's *Feed the Groundhog* fundraising campaign, which coincided with Groundhog Day, combined direct mail and social media in an effective way. A series of YouTube videos posted on Facebook supplemented and explained the mailers, which asked donors to place their donations into a groundhog's mouth.



## WHAT DID THE RESEARCH SAY?

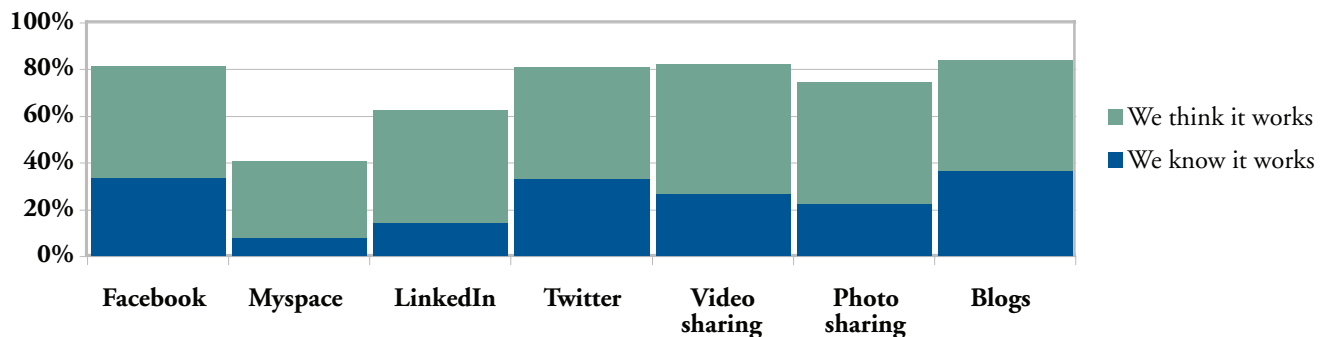
As reported in our *Social Media Benefits Survey*, nonprofits using social media found many specific channels useful for reaching out to new constituents (note that the percentages are of those actually using the channel).

### Reaching New Supporters For Your Organization



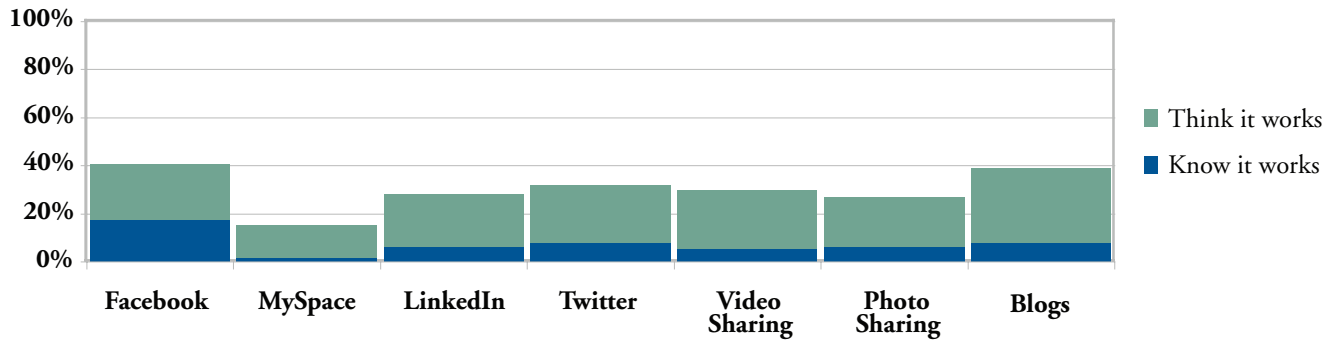
The results were similar when we asked about enhancing relationships with their existing audiences:

### Enhancing Relations with Your Audience



However, they went down substantially when we asked about fundraising:

## Raising Money For Your Organization



The case study analysis showed similar findings. Of those who spend at least two hours a week on each social media channel, 54 percent reported results we considered a substantial success beyond simple growth in the social media tools themselves—for example, an increase in website traffic, substantive feedback, or new volunteers. Another 5 percent said they saw success, but it was less conclusive in our eyes. And 19 percent said they had seen no results beyond the tools. (An additional 7 percent said they didn't know, or they didn't know how to measure.)



Is your organization trying to influence decision-makers? Inform citizens and voters? Spread awareness of a cause? If so, you're an advocacy group—and social media may be a valuable addition to your toolkit. Sites like Facebook and Twitter can be a useful first step for engaging new supporters and helping to spread your information to more people. Different channels can even be the battlefield where supporters take action, by signing a petition, contacting legislators or other decision-makers, or just showing their support for the cause. Events can also play an important role in advocacy campaigns, and social media is a great way to promote and support such events. (For more information, see Events on page 37.)

Let's look at the different ways to use social media for advocacy.

---

## Social media's not just a way to spread the word—it can also help with the actions your campaign is taking.

---

### Educate About Your Issue

Using social media to present your issues can engage and mobilize your constituents. For instance, a Twitter feed can provide supporters with quick updates as your campaign develops, as well as distributing new resources to them. A blog lets you write about the issues and the campaign at more length. Eloquent written information can not only help to build your movement, but can position your organization to press and peers as an important voice—which then helps your information reach a wider audience.

Social media also provides a way to solicit and display supporter-created content, like photo albums of signs your supporters created for a rally, or a YouTube channel showing videos filmed by your constituents. A substan-

tial number of photos or videos can show how much support you have for your issue, and such supporter-created materials can also come in handy in the future for re-use.

### Taking Action

But social media's not just a way to spread the word—it can also help with the actions your campaign is taking. Facebook and Twitter are effective ways to circulate online petitions, helping you to reach beyond your direct supporters to friends of your friends. Or, you could ask people to take action within the social media platforms themselves, like asking them to change their profile pictures to an image that represents support for your cause.

Another form of action is to rally supporters to tweet

#### Workers Interfaith Network

Workers Interfaith Network is a religion-based labor advocacy organization with a focus on improving wages and conditions for workers. The organization originally came to Facebook through Causes.com in an effort to reach a new audience. Instead, staff found that Facebook was more useful for engaging current constituents and keeping them updated and involved.

The staff spends about three hours a week on Facebook. Because it's primarily an advocacy organization, much of that time is spent posting petitions and events. The site has become an important part of Workers Interfaith Network's communication mix. While it still sends out weekly email blasts, Facebook complements those communications, delivering important updates of breaking news in between emails so supporters aren't overwhelmed by email.

This practice proved important recently during the deliberation of an unpopular bill at the local statehouse. Workers Interfaith Network relied heavily on Facebook to keep protestors at the statehouse updated when the deliberations and votes on the bill were postponed or rescheduled. Along with other media channels like Twitter, blogs, email, and the organization's website, Facebook helps provide the up-to-minute information that supporters want.

directly to politicians, companies, or public figures, now that so many of them are using Twitter. One or two tweets may not be noticed, but an onslaught from a large group of your supporters can draw attention to an issue. Since other users are likely to also see the tweets, the effort can attract attention to the cause. This can also work on Facebook—Kentucky Fried Chicken’s Facebook page was flooded with so many PETA protestors posting on its wall in support of more humane chicken conditions that within hours, the company called PETA to negotiate an end to the barrage.

## Thanking and Celebrating

At the end of a successful campaign, don’t forget to thank your supporters. When the campaign or event wraps up, send a brief Facebook update or tweet, and then take the time to craft a more polished email or blog post afterward. Celebrating creates a sense of energy that can help keep supporters motivated until your next action.

You can also use photos and videos to supplement blog posts as longform ways to thank supporters. They allow you to display images from rallies or clips of speeches as a retrospective of the campaign.

## WHAT DID THE RESEARCH SAY?

In our 2011 Facebook survey, we asked respondents both if they had seen success moving people to action and if those calls to action were important to their missions. When asked whether or not they saw success moving their supporters to action through Facebook, approximately 66 percent of respondents reported moderate to substantial success. This high success rate may be indicative of the ease and prevalence of online advocacy actions, like petitions and pledges. These actions are also easily spread friend-to-friend in a social media setting, which can lead to greater reach than traditional petitioning methods.

As free platforms for networking with new and existing supporters, social media channels can supplement your existing recruitment and engagement strategies, but it's not always as easy as saying, "Hey, we need volunteers." While directly asking for volunteers can get responses from repeat volunteers and die-hard supporters, it may not be enough to attract new volunteers. Converting new supporters into volunteers through social media can take time, and constant direct appeals may scare them away. Instead, social media is a good way to bring new supporters into your community.

### Conversation and Community

Social media provides new supporters and potential volunteers a space to learn about your organization as well as a safe space for your current volunteers and other supporters to connect with each other and the organization. For example, current and past volunteers could post comments or stories about volunteering to

---

**"We like to promote people when they do things on their own, like volunteer fundraisers who host events, which then encourages other people to do the same types of things, or gives ideas to other people."**

**-Mike McFall, Williams Syndrome Association**

---

### New York City Anti-Violence Project

The New York City Anti-Violence Project was founded in 1980 as a reaction to neighborhood incidents of anti-LGBT violence. All-volunteer run until 1984, the organization still relies on volunteers for a number of tasks—as many as 125 different volunteers each year, half of them new. And while it employs several methods to attract and retain volunteers, it's found Facebook to be a good way to help meet its volunteer needs.

AVP uses three distinct types of volunteer-recruitment posts. Some are built around events that need more traditional, grassroots mobilization efforts, which are the easiest for their organizers to write. These calls are often as easy to say as, "Come stand with these folks." Others focus on more socially oriented events. These events are messaged as, "Here's this fun thing to support AVP, come support us and help others support us," basically a code phrase for, "We're having an event and we need logistical help." The third kind is program-oriented, and focuses on specific asks, like for AVP's speakers bureau program. This type of recruitment post requires extra steps to speak more about the program, but the ask is secondary to the overall message—that people want to be a part of the event because it's important.

your Facebook wall or blog, which new supporters can read, comment on, or ask questions about. Social media venues are also a good space for potential volunteers to voice their concerns about volunteering in a way that the community can respond. Past volunteers and staff can discuss these concerns in an open environment to help mitigate any fears or address any problems that may come up.

### Recognize Current Volunteers

Social media is also an excellent platform for thanking your current volunteers. Simple tweets and status updates right after or during a big volunteer event can provide immediate recognition. Photos and videos of your volunteers in action can help show new supporters what to expect, which can mitigate some

---

**“The expectation when folks show up, as well as the frequency of communication leading up to when they do show up to volunteer, is the same regardless of your method. Facebook just allows you to reach a higher number of people, or different populations.”**

**-Joyce Li, New York Anti-Violence Project**

---

of the concerns they might have about volunteering. By recognizing your volunteers' efforts, you let them know how much you appreciate them, which in turn motivates them to continue volunteering with your organization. Repeat volunteers can be some of your biggest advocates and can motivate new people to volunteer.

## **Reaching Out to New Volunteers**

Recruiting volunteers through social media is not always easy. There is a substantial jump in commitment between “liking” an organization and giving your time to help it. Networks like Facebook or Twitter are best thought of as stepping stones to your organization, an introductory part of your larger recruitment strategy.

Your Facebook page or Twitter feed doesn't exist in a vacuum. Be sure to integrate your social media channels with your website and processes. When promoting a big volunteer event or fundraising drive, it makes sense to direct supporters to your website signup page or volunteer portal, or to a page or blog post explaining the event. Remember that if you're sending potential volunteers to a website, that site needs to be engaging and helpful.

## **WHAT DID THE RESEARCH SAY?**

In our 2011 Facebook survey, we asked respondents both if they had seen success moving people to action, as well as if those calls to action were important to their mission. When asked whether or not they saw success moving their supporters to action through Facebook, approximately 66 percent of respondents reported moderate to substantial success. This high success rate may be indicative of the ease and prevalence of online advocacy actions, like petitions and pledges. These actions are also easily spread friend-to-friend in a social media setting, which can lead to greater reach than traditional petitioning methods.

Social media tools can help you to communicate with supporters about an event—prior to it as a means of spreading the word and increasing attendance, as a real time communication during the event itself, or as a means of following up with participants after it has ended.

### Promoting Your Event

Social media can be a useful part of an integrated communications strategy to spread the word about an upcoming event. Facebook, for example, features a basic event and RSVP tool which allows supporters to easily invite friends not already in your network. You can feature pictures or videos of similar past events to encourage attendees, and if you're already using a separate event registration tool, you could post the link and ask people to share it via Facebook or Twitter. Social media channels also provide an opportunity to promote early bird or discounted ticket prices, as Facebook updates and tweets are often noticed earlier than email.

### During Your Event

Social media can be used to promote the event as it happens, as well. Consider putting your event location on geolocation tools like Foursquare or Facebook Places and encourage supporters to “check-in” to the event (perhaps with an incentive, like a T-shirt, for doing so). This approach can also help show the size and popularity of the event, emphasizing the impact it might have. Also consider “live-blogging” the event, either through your organization's blog or through tweets. For a geographically distributed organization, live-blogging engages supporters too far away to attend.

You can also use social media to communicate with participants at a large event, like a rally. Facebook and Twitter updates, for example, can be sent and read via mobile phones, and can spread a message in near real time. Remember that you may have followers using Facebook but not Twitter, or vice versa, so you might want to post to both channels.

During a gala or other fundraising event, social media can be used to enhance participation. Start a Twitter hashtag for your event (#Gala2012, for example) and encourage attendees to tweet. Some events even project Twitter onto a screen so everyone can keep up with tweets in real time. Your feed may still be full of comments and discussion of the event days later, which extends engagement. In addition, YouTube or Instagram updates can fill the role of a slideshow and bring new and unique content to a presentation or speech.

### After Your Event

Social media is an ideal space to follow-up after an event. Photos and videos of your attendees at an event allow supporters who didn't attend to see what they missed, and can help promote future events. Letting attendees post their own pictures, blog posts, and videos provides a way to share stories. Public discussions about what went well—or not so well—through Facebook, blogs, or tweets can help you plan future events and let your supporters be more invested in what you do. Your Facebook page or blog is also a great place to thank attendees and volunteers from the event, and to continue to build those relationships for the next event.

Social networks bring millions of people together with each other—and their own personal networks—in a free online space, a wealth of potential supporters that's very attractive to nonprofits. There are several ways to take advantage of this networking for outreach and promotion.

### Driving Traffic

Social media is successful at driving visitors to your organization's website. On Facebook or Twitter, for example, you can post links to interesting or relevant articles, blog posts, useful resources, even petitions or pledges for your supporters to click-through and read. Compelling and useful information can drive traffic from your social networks to any website. The trick is to balance posting links to what you want supporters to do—like make an online donation or sign a petition—with what they want to see, like an entertaining video or an informative resource.

Before attracting new visitors, of course, it's important to make sure your own house is in order. Your website is the official face of your organization online. Does it look up-to-date, or like a relic of the nineties?

### Building Lists

Organizations are not generally as successful using social media to build their email lists as they are at driving website traffic. However, subscribers to an email list are generally more prone to take action or make a donation

than social media followers, so it's a worthwhile goal to pursue. Try including a call to sign up for email updates in your social media channels—for instance, through posts, a sign-up box, or a custom tab in Facebook.

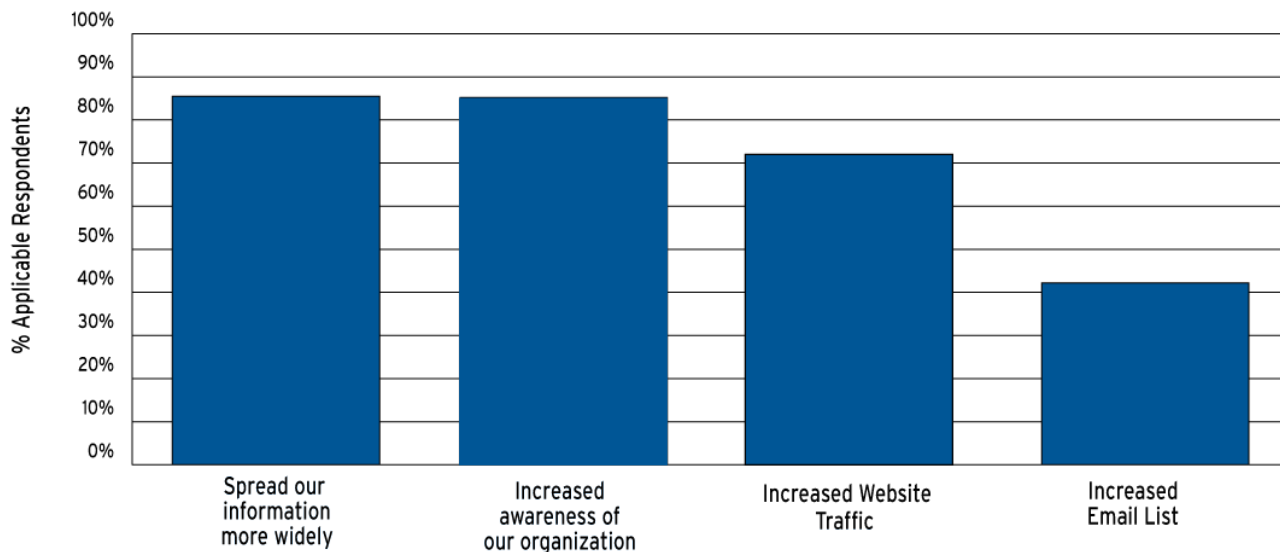
Because social media is a useful channel for calls to action, list-building tools like pledges can be effective on sites like Facebook or Twitter. It's a fairly simple and low-commitment request for visitors and supporters to sign up to support your cause, and then receive updates. However, make sure that you're not just trying to build your list by claiming that signing a petition or pledge will help your cause in of itself if you don't think it will.

### Viral Videos

People often talk about spreading the word by "going viral," but what does that really mean? Social media sites spread videos and other content through your network of friends and followers, but also allow your viewers to spread it through their own networks of friends. This friends-of-friends sharing is the "viral" motion that can catapult a video or other content to new audiences. It's important to note that, while some types of videos are more likely to "go viral," whether something does or not is very unpredictable. Viral marketing is an aspiration and pleasant surprise when it happens, but it's not a reliable strategy.



## WHAT DID THE RESEARCH SAY?



Respondents in our 2011 Facebook survey reported a lot of success reaching out to new and existing supporters, with about 85 percent seeing moderate to substantial success increasing awareness of their organization on Facebook, and spreading their information to a wider audience. It's important to note that respondents did not explain how they determined these results, so should be considered a measure of how organizations perceived their success.

Respondents also reported good results in increasing traffic to their websites. Just over 70 percent of organizations saw a moderate to substantial increase in traffic to their websites coming from Facebook. Web Analytics tools like Google Analytics are easy to implement, and allow you to track how visitors came to your website as well as where they were before coming to your website.

However, only about 40 percent of respondents reported a moderate to substantial increase in their email lists as a result of Facebook. Additional research on the correlation between Facebook fans and an organization's email list, based on data gathered from this survey, revealed that a typical organization can expect to have about a fifth as many Facebook fans—20 percent—as they have people on their email lists. For more information, view our Facebook Benchmark Scatterplot online at <http://idealware.org/blog/how-many-facebook-fans-should-your-organization-expect>.

---

# CREATING YOUR SOCIAL MEDIA STRATEGY

---

## HOW MUCH TIME SHOULD I SPEND ON SOCIAL MEDIA?

Because every nonprofit has limited staff time, assigning someone to one thing often means stealing time from something else. This becomes a big factor in communications. Because social media channels can be less formal than many communications methods, and encourage shorter messages, they're potentially easier to keep up with than direct mail or email communications. On the other hand, they can be deceptively time-consuming—although a Facebook or Twitter post could take just a matter of minutes, you'll also need to follow along with what people are saying, keep up a consistent flow of interesting information, and plan and evaluate your strategy.

As a rule of thumb, set aside at least two hours each week for every social media channel in your mix. If your time is limited to three hours or less per week,

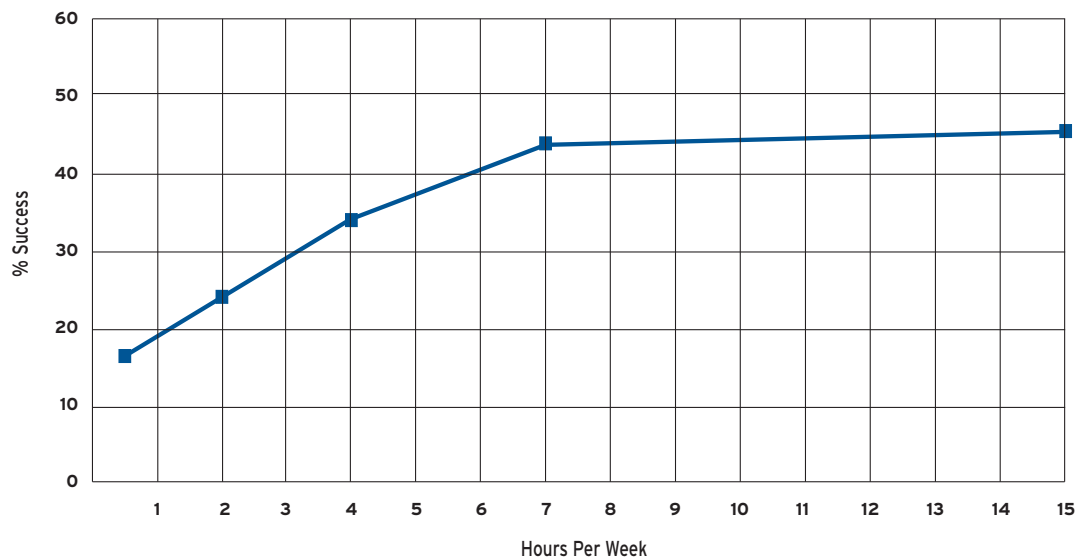
start with a single channel that seems like the best bet for you. It's far better to use one or two channels well than many channels poorly.

(By the way, it's possible to link channels so your blog posts automatically show up on Twitter, or Twitter posts on Facebook... or both. In our opinion, this is only worth doing in specific cases where the information is specifically applicable to both channels—for instance, your blog automatically posts the title and URL of each blog entry to a Twitter feed, which essentially creates a way for people to subscribe to your blog via Twitter. Otherwise, it's often a false time savings, and just automates the process of managing a lot of channels badly.)



## WHAT DID THE RESEARCH SAY?

In our 2011 Facebook Survey, we found that the more time organizations put into Facebook each week, the more likely they were to see success in their goals. Devoting time to social media does not necessarily guarantee success—of organizations spending the most time per week, only just under 55 percent were seeing success—but not putting in enough time almost guarantees failure. Only about 15 percent of respondents spending less than an hour per week on Facebook reported success.



This chart shows that more time spent on Facebook is likely to result in success, but that extra time would cost organizations more than they would get out of it. For example, it would take an increase of eight hours per week just on Facebook to raise the success rate from 45 percent to 55 percent.

The majority of respondents were spending four hours a week or less on Facebook, and organizations reporting success were spending an average of 2.6 hours per week. This supports our previous case study research, which showed that the 75 most successful organizations were spending on average two hours per week, per channel.

## DEFINING YOUR SOCIAL MEDIA VOICE

For the people following you primarily through social media, your organization is embodied by the things you post. What you say, and how you say it, is of critical importance to their perceptions of you. Your tone can tell your audience much about your organization (Are you research based? Quirky? Supportive?), but should also be influenced by the medium. A Facebook page tends to be more casual and informal than a blog, for example, which is in turn less formal than a website.

Social media channels are focused around person-to-person interactions, so it's also important to focus your posts around a personal viewpoint. Unlike a press release, posts to Facebook or Twitter should have more of a human perspective. You could provide, for example, a behind-the-scenes view of what goes on in the organization, or commentary on things happening in your area of expertise.

If you have more than one person posting to your Facebook wall or Twitter stream, think through whether you want them to all use the same tone. Are they posting as the organization, or can they bring their own individual voices? In other channels, like a blog, the author's name is usually already prominent—it may be helpful to have the author include their name or initials at the end of each post or tweet. Distinguishing between authors and voice can allow your staff members to fill different roles.

You've chosen social media tools that seem like they might work. You've defined goals and thought through, at the high level, how you want to communicate on social media. But how do you actually create a strategy post content to achieve your goals?

It can be very helpful to define a campaign—basically, a time period with clear start and end dates during which you push to achieve a specific goal through frequent, targeted posts. As an example, think of a volunteer recruitment campaign that takes place over three months and uses a number of different communication channels. Your need for volunteers may not end in three months, but the fixed timeframe helps you set priorities and timing and provides an obvious time to check in to see how your tactics are working.

There's no simple formula to decide what social media activities should be part of your campaign. Trial and error may well be your best guide. Brainstorm social media tactics that might be effective based on your goals—for example, you might post one new testimonial every day, or photos or videos, or round up all the relevant news on a core topic. Or you could try to engage people with polls or questions or petitions. Pick a core set of tactics that make sense to you.

Like fundraising campaigns, social media campaigns should be designed to achieve a particular set of targets within a specific period of time. Without a target or end

date, it's impossible to judge if your tactics worked. During the campaign, measure things that are highly targeted toward your goals by paying attention to what's happening and what people are saying—this allows you to adapt the campaign on the fly. After the campaign, review the metrics to measure your successes and failures. If it worked well, you have another tool in your communications arsenal. If not, you've learned what doesn't work for you and you can try something else next time.

But you want to hold onto your audience during these periods, too, so you can't just drop off the social media channel entirely. Think of the time between campaigns as more open-ended, flexible “maintenance” periods, and use a more moderate amount of activity to retain and grow your audience. In our volunteer recruitment example, you might throttle back to fewer posts of a more general nature following your big volunteer push.

The perfect time for experimentation is during maintenance periods, not during campaigns. Don't be afraid to test different strategies and use measurements to evaluate their relative success or failure. These are good opportunities to determine when is the best time to post, what types of posts your community wants to read, or what is the most effective way to spark conversation or some other type of action.

Choosing the right communications tools for each campaign isn't an either/or situation—for example, should you use Twitter, a blog, or email—but a question of finding the right mix of channels for your needs. Think of your communications mix at its highest level. Clearly, you can't plan social media communications in a vacuum. You need to integrate with the other types of communications you're doing, such as direct mail, email, phone calls, and person-to-person events and meetings.

Start with your campaign goals to define what tools you should use for specific needs. Don't think about each channel as a venue for saying whatever comes to mind willy-nilly but rather as part of an overall communications strategy. All your communications should move you in the same direction.

Different communications tools work in different timeframes. For example, it's not practical to send out more than a few direct mail pieces over the course of a year; email is more of a monthly or weekly communication stream while Facebook or blogs are something you might post to weekly—or a couple of times a week—and you can easily post to Twitter several times a day. Photo and video sites, on the other hand, are not particularly timing-specific. You could post weekly or more frequently, but you could also simply post photos or videos whenever you have them.

Depending on your campaign, you might want to choose a mix of channels that are similar in terms of timing, or one that uses channels with completely different timeframes. For instance, if you have just a week to get 10,000 signatures on a petition, direct mail isn't likely to be useful but Twitter and Facebook could be your best friends. On the other hand, if you're looking to encourage people to attend your conference in two months, channels with different timing can reinforce each other. You could send out an introductory direct mail, follow it up with several emails spaced out over that time period, create a blog focusing on all the great content and speakers, and use Twitter to try to get out the word (and maybe even earn some media attention).

Remember, however, that the channels that let you post frequently also generally come with the expectation that you will—it's not enough to post to Twitter several

times a day in the heat of a campaign, abandon it for months, and then pick it up again the next time you need it. That's not how people use Twitter, and that kind of behavior may lead them to stop following you. The same is true of Facebook or blogs. It's important to establish a baseline frequency that's close to what people would expect, and stick with it.

### Reinforce Channels Over Time

Think through ways to draw constituents from one channel to another. Add a link to your Facebook account from your website or automatically pull your Facebook posts into a webpage—these easy actions, and others like them, can go a long way toward making all your channels feel like a cohesive whole. Other examples include pulling a rotating set of photos from Flickr into your website, or putting links to your social media channels in your broadcast emails. If you have an email discussion list, that's already an engaged group, and a great place to talk up and link to other channels—or to use as a starter group for a photo or video experiment.

If you're communicating through multiple channels in a fairly close timeframe, it's important to coordinate them. For instance, if you're doing a direct mail campaign, it makes sense to mention it—and to possibly even have substantial tie-ins with frequent updates or additional stories—on your social media channels.

It should sound like the people in charge of the different channels are talking to each other, but the messages shouldn't be identical. Technically, it's possible to blast out a message to many social media channels at the same time, but that's almost always a bad idea. The platforms are different enough that you should consider the audience and expectations for each and tailor the messages accordingly. Twitter posts must be fewer than 140 characters, but a Facebook post could be longer and can include a link with a picture; a blog post could provide considerably more backstory. As supporters are likely using a particular channel because that format works for them, try to avoid making them switch to a different channel to get the information they want. Remember, they're using these channels to reach out to them where they are.

We've talked about the importance of measuring to keep tabs on your campaign, but what, exactly, do you measure? There's value in casting a wide net to gain a fuller picture, but balance the impulse to collect everything with a manageable and useful measurement plan. A few carefully selected and consistently collected data points are often enough to shed substantial light onto your strengths and weaknesses. Just because you can collect something doesn't mean you should.

Start with your goals. As we discussed, you must have a specific goal—"recruit more volunteers" and "get people to read our report" are actionable goals, while a nebulous goal like "increasing awareness" is virtually impossible to measure. Instead, ask yourself, "Why do I want to increase awareness?" What do you hope increased awareness will do for your organization?

How do you know you have an actionable goal? Start with the SMART acronym: Specific, Measurable, Achievable, Relevant, and Time-Based. Let's look at these one at a time:

### Specific

Merely having a social media presence is not a strong goal. Your organization will get more focused and demonstrable results if you first define what you hope to accomplish. Let's say your organization has a fundraising event coming up and you're planning your social media campaign to help convince people to attend. Promoting the event is too vague a goal. Recruiting attendees is better, but not specific enough. Recruiting 25 attendees who haven't attended before is a specific goal that gives you something to aim for—and something to measure.

### Measurable

Tracking results in real time can help your staff manage a diversified social media presence. Reporting on your successes with social media can also be a great way to sell board members on the value of social media, especially when it helps you to better meet your mission. Measurement will also help you decide if it is worth continuing to pursue social media tools.

A variety of third-party services can provide statistics about your organization's Facebook, blog, and Twitter presence, and many tools have their own built-in mea-

surement tools, like Insights for Facebook, or Pinterest Web Analytics.

There are different types of measures, and it's important to think about how well each relates to your goals. We divide online metrics into four groups:

- **Views:** Views tell you how many people you're reaching. Blog page views measured through a website analytics tool like Google Analytics or Facebook views measured through Facebook Insights can show you just how many people you're reaching. This can be useful if your primary goal is to spread a message—for instance, who should get a flu shot—but don't get too caught up in views. Expanding your audience is great, but if none of these people chooses to follow your information, engage with you or act to help your organization, then increasing your reach may not be useful to the organization as whole.
- **Followers:** This tells you the size of your supporter base. By looking at the number of Twitter followers, people who "like" your Facebook page or those who subscribe by RSS to your blog, you can get a sense of the number of people you're able to reliably get in touch with in order to spread a message or ask for help. Just as with views, it's all too easy to look at your number of followers as an end in and of itself rather than a means to reach your goals. Does it matter if you have a million Facebook fans if none of them ever does anything to help you?
- **Engagement:** It's often useful to get people involved—not just reading and following, but actually commenting on your blog, posting on your Facebook page and retweeting on Twitter. Counting the people who actively participate on one of your online channels confirms that you're saying the types of things people want to hear, effectively encouraging them to be more involved. If engagement itself is a core goal—for example, to get youth talking about sexual health, or to give homebound people a creative outlet—then these metrics provide a great way to track your progress. But if you're focused on other actions that directly help your organization, like volunteers, event at-



tendees or donations, then the conversion metrics outlined below will provide the core information to know if you're succeeding.

- **Conversion:** Do your online communications help create real world results? Conversion metrics help you measure actual, tangible outcomes for your organization, like donations, number of volunteers or event attendees. How do you count the impact of social media on such things? You could ask people where they heard about the opportunity, or attach online source codes so you can tell where someone came from to donate or register. Marketers often fall back on a method called “lift” to try to indirectly measure conversion—if you leave a gap between communications, you can roughly tie the results you see to the communication you just put out.

In deciding upon metrics, choose one or two measures to track the direct outcome of your campaign—these are likely to be conversion metrics—as well as some indicators along the way. For example, say your goal was to sign up 25 attendees for the upcoming fundraiser, and your targeted Facebook campaign only recruited five. On face value, the campaign failed. But say 300 people saw the campaign posts on Facebook and 50 responded to the event saying they were coming—you've gotten a much different story from your measurement. Maybe a conflicting event or bad weather kept people away, but your posts sparked interest, providing feedback for your next campaign.

You can and should try to quantify your results in some way. If you find yourself saying “that's impossible to measure,” prompt yourself by asking “what organizational results would I ultimately hope to see?” or “How will I know that this worked?” If you can't define what success would look like, that's probably an issue with your goal rather than something that can be addressed through measurement.

Make sure you're clear on what “success” means. Simply saying “we want this post to get more people to attend our events” is too general. Is one extra person at your annual gala a success? If your goal is to get 20 more attendees at your winter fundraiser this year than at the previous year's, you can track exactly how successful you are.

## Achievable

If you set your goals too high, you can become disappointed with the return on investment and stop maintaining your presence when it fails to meet your lofty expectations. Say you hope to get 100 new volunteers in two weeks through a social media channel and you currently only have five; it can be easy to blame the tool for being unable to achieve a nearly impossible goal.

You'll also find it useful to set benchmarks for success. If your goal is to recruit volunteers, set a specific number of volunteers who tell you they found out about the opportunity on Facebook, for example. Or, if you want to spread information, define a benchmark for how many page views of the resource you're sharing you'll need to consider it a success. Setting numbers gives you something to measure against. Tracking them makes it easier to know what to expect for next time.

Targeting a specific demographic can be helpful when trying to choose achievable goals. For example, “increasing awareness of our cause” is not only difficult to measure, but also lacks time limits for benchmarks. Will you go on increasing awareness forever, or is there an amount of “awareness” you will need to achieve? If your organization instead set its goal to “getting more young men from Greater Boston to attend our meetings this coming year,” it is more likely that you'll actually see successful results.

## Relevant

Now ask yourself whether this goal will help your mission and resonate with your target audience. Maybe you have a budding photographer on staff and want to share more photos online. If your supporters aren't checking out and sharing the photos you post now, it's unlikely your photos will engage the community on a more-cutting edge social media tool, either. If you can't connect your goal to the actual strategy you put into place, it will be more of a challenge to be successful. In this way, doing substantial planning and research about your goals and the tools and strategies that will fit will make it easier to feel successful.



## Time-Based

Design a timeline of smaller more-attainable goals, and stick to them. By reaching certain benchmarks of success, you will be more encouraged to move forward. Exploring a new tool, creating an organizational presence there, uploading certain content, and getting a certain number of followers are good small goals you could likely achieve before you see any results in your mission-based goal. Setting this timeline for success will also be helpful in determining when your presence is not helping or isn't worth the amount of staff time put into it. A good following takes time to build, but if you aren't seeing any results after six months of good content, interesting discussion, and frequent updates, the tool may not be suited for your mission.

Your social media activities will be cyclical. Begin by setting clear goals, define how you'll try to achieve them, and then how you'll measure if you succeed. Take action against those goals and measure how you did. Then you go back to the beginning and start all over again. Refine your tactics and your measures based on what worked (or didn't the first time). The whole purpose of measuring is to learn from what you did so you can do it better next time.

With all tools, there are certain best practices to keep in mind. Most of these tools are based around following or subscribing to different users' content. On

Twitter, for example, it's good etiquette to follow the users that follow you, but depending on the size of your organization, you might limit this list to only the users that provide compelling content. Additionally, as many social media sites gain precedence on the web, make certain that your tags and descriptions are search engine friendly. This could mean tagging posts with appropriate hashtags, like #nonprofit, or including language about your cause whenever possible.

Once your organization has set social media goals, continue to evaluate your presence and allow it to evolve. You may discover new features that could help you in your mission. The website itself may change, and your organization must continue to grow with it—for example, the Facebook timeline feature completely changed the look and feel of pages. By planning for such changes before they take effect, you can make the most out of new features and stay up to date.

You might discover that your strategies with social media may need to evolve. If you find you are unable to meet your goals, you might try experimenting with other kinds of content or uses for the site. Don't forget to continue to remind your current supporters of your new social media experiments and to encourage them to follow you.

Every organization has different needs, issues and concerns, so it's difficult to create a "one-size-fits-all" social media policy. You need to think the issues through for yourself. But it can be effective simply to hold a conversation at your organization to talk about key questions, concerns and suggestions. These conversations can be just as important and useful as having a finished policy in hand.

### Personnel

First, think about who should be in charge of your social media presence. This person will be able to answer staff questions on policy, monitor activity, and lead your social media campaigns. Is this person in charge of all your social media, or do you have different people running different tools (for example, one person in charge of Facebook, another Twitter)? This may seem like a good job for an intern or a volunteer, but neither is permanent, and your Facebook page will still be there even after a college student graduates.

Who else at your organization is allowed to post to your social media channels? Are they posting as themselves or the organization? To which channels? Assigning certain channels to certain people can play to their strengths or interests and ensure that your organization is equally represented. You wouldn't want everyone trying to post on Facebook while your Twitter feed is ignored.

Finally, who is contributing the information that you post? Does each person find their own content, or does everyone pool resources?

### What Topics are Off-Limits?

Think through what topics are appropriate for your staff to post about or discuss on social media sites. Should your staff only discuss topics directly related to your mission, or is it acceptable to stretch their legs a little? Are there any topics that should be approved by a supervisor before posting? What topics are always inappropriate for your organization—perhaps that are too removed from your mission or too controversial. It's a good idea to discuss these potential problems with your staff before they start posting.

### Privacy and Permissions

Social media is an open and public place. Not all supporters or constituents may be comfortable having their photos on Facebook or Instagram, and may not want to be mentioned by name at all. Be sure your staff takes care to respect the privacy and wishes of your community. To this end, your policy may require people to give permission before you can post a picture of them. This can apply to pictures of large groups or events as well. Organizations that work with kids should make sure to check with parents before posting a child's picture, and those that deal with sensitive issues should make sure not to reveal confidential information just by saying someone's a client—for instance, members of a support group might not want their colleagues and friends to know about their affiliation.

### Balancing Personal and Professional

Sites like Facebook or Twitter are, of course, social places, and it is to be expected that your community won't always want to talk business. That's a good thing—but you should discuss when it is and is not appropriate for staff to post purely personal stories or pictures on your organization's page. It's not always bad to have a few personal discussions, and they can really help engage your audience in a way that is only possible on social media.

Staff probably also have their own social media accounts. You'll want to identify things that would be inappropriate for them to say about your organization on those accounts. They may be representing your organization when they talk about current events or other issues whether they intend to or not. Should they disclose where they work when in a relevant discussion? Or should they not mention your organization at all?

## What if it Goes Bad?

A written social media policy can act as an emergency response plan, but even an informal discussion lets your staff know who to talk to when a problem arises. Think through what those issues might be, and plan for them. Examples include:

- Clients posting about negative experiences they've had with one of your services.
- Rude comments posted to your community (religious organization, neighborhood organization, school).
- Posts that include misinformation about your programs or work.
- Someone reposts your work/property without attribution.
- Repeated negative posts or obscene comments.
- Violation of your community guidelines.

Most issues or negative posts are not malicious. If a client complains about their experience with you, you have an opportunity to respond in a constructive way and learn how you can improve your services. Think through how your specific organization should react when these issues come up. In what circumstances should you respond, and how? In what circumstances should you ignore posts or take them down?

## WRAPPING UP

Regardless of the channels you choose, or your organization's mission, your goal is the same when planning a communications strategy: to use the channels that best fit your needs and resources in a way that helps you fulfill your mission. For example, choosing a channel with a lot of potential doesn't make any sense if you don't have the resources to devote to it. Similarly, spending a lot of staff time on a channel that doesn't reach your organization's audience—or result in any tangible outcomes—is a misguided use of resources.

The information in this guide is a starting point to help you choose the best channels for your organization, and to point you in the right direction to make them work for you. Social media works on momentum—followers beget followers—and you'll likely find that getting started is the hardest part, but you've already taken the first step.

Whichever channels you choose, integrate them with your existing channels to create a cohesive whole—a strategy to reach as many segments of your audience as possible, attracting and engaging supporters and keeping them interested and informed.

Remember, social media is not just a means to distribute one-sided requests or missives. It's a conversation. If you want your supporters to hold up their side of it, be sure to hold up yours.

---

# WORKBOOK

---

Ready to figure out what this all means for your own organization? This Social Media Decision Makers Workbook will help you to define your goals and audiences and to brainstorm the channels that make the most sense for you. Based on those channels, it helps you think through what you're actually going to do, how much time it will take, and what some of your policies should look like.

The worksheets are in the same order as the guide itself, and the guide will tell you where they fit in. Feel free to fill them out as you read it, wait until after you've finished it, or even pull out just one or two that seem particularly useful. The important part is to use them in a way that is helpful to you.

---

**This workbook will help you to define your goals and audiences and to decide on the channels that make the most sense for you.**

---

# 1. IDENTIFYING YOUR SOCIAL MEDIA GOALS

Before you can make decisions about which social media to use, you should be clear on your goals. Be specific—"reaching out to people" is too broad, for example. This type of goal will make identifying your strategy difficult and measuring your progress all but impossible.

We've created a list of sample goals to get you thinking about your own. Check off all of the reasons why you want to use social media with your organization.

- |  |  |
|--|--|
| <input type="checkbox"/> Reach a youth audience                          | <input type="checkbox"/> Recruit new members, advocates or patrons     |
| <input type="checkbox"/> Promote an event                                | <input type="checkbox"/> Support a group of members, alumni, etc.      |
| <input type="checkbox"/> Build excitement prior to an event              | <input type="checkbox"/> Tell stories about the work you do            |
| <input type="checkbox"/> Get people to take a particular action          | <input type="checkbox"/> Get press coverage                            |
| <input type="checkbox"/> Draw traffic to a particular online resource    | <input type="checkbox"/> Connect with other like-minded organizations  |
| <input type="checkbox"/> Build your email list                           | <input type="checkbox"/> Change hearts and minds on a particular topic |
| <input type="checkbox"/> Solicit donations for your organization         | <input type="checkbox"/> Gather photos or videos from supporters       |
| <input type="checkbox"/> Get supporters to solicit donations for you     | <input type="checkbox"/> Understand what people are saying about you   |
| <input type="checkbox"/> Recruit volunteers                              | <input type="checkbox"/> Keep up to date with a particular issue       |
| <input type="checkbox"/> Brand your staff as experts on a cause or issue | <input type="checkbox"/> Coordinate people in an action or a project   |
| <input type="checkbox"/> Get your constituents to talk to each other     | <input type="checkbox"/> Other _____                                   |
| <input type="checkbox"/> Get feedback from your constituents             | <input type="checkbox"/> Other _____                                   |
| <input type="checkbox"/> Keep your supporters updated on happenings      | <input type="checkbox"/> Other _____                                   |
| <input type="checkbox"/> Build a community around an event or topic      | <input type="checkbox"/> Other _____                                   |
| <input type="checkbox"/> Let supporters publicly support your cause      | <input type="checkbox"/> Other _____                                   |
| <input type="checkbox"/> Disseminate information about an issue or topic |  |

Now, go back through the list and choose your **top three goals**. Tailor them so they're specific to your organization (i.e., "Understanding what people are saying about Idealware") and write them on the lines below.

These goals will be your focus throughout this workbook.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



## 2. ENSURING “SMART” GOALS

Now that you’ve identified your three most important goals for social media, let’s dive deeper. Define how each of your goals is “SMART”—Specific, Measurable, Achievable, Relevant, and Time-Based.

	Example	Goal 1	Goal 2	Goal 3
<b>Your Goal:</b>	Encourage more youth aged 16 to 22 to volunteer.			
<b>Specific</b> How will you know you’ve succeeded in your goal? <i>S</i>	We’ll recruit at least five more 16 to 22 year olds to cook or distribute food.			
<b>Measurable</b> How will you measure your success? <i>M</i>	Increase in # of 16 to 22 year olds who say they found us on social media channels			
<b>Achievable</b> Are your specific benchmarks realistic compared to past results? <i>A</i>	We’ll recruit at least five more 16 to 22 year olds to cook or distribute food.			
<b>Relevant</b> Why does this matter to your organization? <i>R</i>	We rely heavily on youth volunteers to staff our food pantry.			
<b>Time-Based</b> Over what timeframe will you achieve this goal? <i>T</i>	By the end of the year.			

### 3. DEFINING YOUR AUDIENCE

When thinking about social media, it's critical to specifically define the audience you want to reach. "The general public," for example, is too vague. Each organization has many different types of constituents who can be reached through social media channels. The challenge is figuring out who you really **want** to reach.

In the diagram below, brainstorm a list of all your constituents in the top box. (Having trouble coming up with constituent types? Use the word bank for ideas.)

Then, identify which of those you **could** reach through social media. Write them in the second box.

Finally, write the constituents from that list who you **want** to reach through social media in the lower box.

These represent the audience you should focus on when planning your social media activities, and as you continue to work through this workbook.

All of your constituents	Word Bank
	Alumni
	Board members
	Card holders
	Case managers
	Clients
	Contributors
	Donors
	Event attendees
	Families
	Former donors
	Foundations
	Friends
	Grantees
	Local businesses
	Members
	Newsletter readers
	Partners
	Past volunteers
	Patrons
	Those on your email list
	Those on your mailing list
	Those who purchase tickets
	Potential donors
	Press
	Prospects
	Resident experts
	Senior citizens
	Staff
	Staff alumni
	Store patrons
	Students
	Vendors
	Visitors
	Volunteers
	Youth

People you could reach with social media

People you want to reach

## 4. A SAMPLE AUDIENCE SURVEY

Knowing which social media channels your constituents use will help you determine the right mix for you, and this sample audience survey can help you figure it out. It can also help gauge your constituents' likely reactions to some of the methods you're considering implementing. Set up this survey in a tool like SurveyMonkey or Zoomerang to conduct an online survey, or distribute in both paper and online for greater reach.

Thanks for your help! We are conducting this brief survey to understand how social media can keep you more involved in our work. All answers are anonymous, and will only be viewed by {your organization} staff.

How often do you do the following, either personally or professionally?

	Never	Occasionally	Daily	Several times a day	I don't know what this means
Use Facebook					
Use Twitter					
Use LinkedIn					
View online videos					
View photos on a online photo sharing site					
Read other people's blogs					
Use a location-based application					
Write posts for a blog					
Post videos online					
Post photos online					

If {your organization} were to use the following, how likely would you be to participate?  
 {fill in the left column with specific tactics your organization is considering}

	Not Participate	Participate Occasionally	Participate Frequently	Participate and Encourage Others to Participate
ex. A Twitter account posting news and resources about child welfare				
ex. An email discussion list for you to share information and best practices with other members				
<b>[your tactic]</b>				
<b>[your tactic]</b>				
<b>[your tactic]</b>				





What types of information would you most like to receive from us?

Other thoughts or comments?

Would you be willing to be interviewed in more detail as we work through our strategy? If so, please write your name and contact information.

## 5. BRAINSTORMING TOOL POSSIBILITIES

Consider the strengths and weaknesses of each tool against your goals in order to determine which channels are right for your organization. Use this worksheet to brainstorm. Write down your first social media goal and brainstorm the ways each social networking channel could help you meet that goal. Repeat for your second goal, and then your third. On the next page, do the same for the other tools.

	<div>Facebook</div> <div><hr/><hr/><hr/><hr/></div>	
		
<div>LinkedIn</div> <div><hr/><hr/><hr/><hr/><hr/><hr/><hr/></div>	<div>Goal 1 <hr/></div> <div>Goal 2 <hr/></div> <div>Goal 3 <hr/></div>	<div>Twitter</div> <div><hr/><hr/><hr/><hr/><hr/><hr/><hr/></div>
		
		
	<div>Blogs</div> <div><hr/><hr/><hr/><hr/></div>	

Again, write down your first social media goal and brainstorm the ways each channel could help you meet that goal. Repeat for your second goal, and then your third.

The diagram consists of a central box with three lines for goals, and four surrounding boxes for different social media channels. Arrows point from each channel box to the central goal box.

**Blogs**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Other**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Goal 1** \_\_\_\_\_

**Goal 2** \_\_\_\_\_

**Goal 3** \_\_\_\_\_

**Video Sharing**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Photo Sharing**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## 6. DECIDING WHICH CHANNELS ARE RIGHT FOR YOU

Now that you know what each tool is good for, let's decide which are good for you. First, consider how much time you can commit to social media channels. As a rule of thumb, estimate two hours per channel, per week.

Number of hours a week you can commit to social media

÷ 2 =

Maximum number of social media channels you can take on

Now, write in your goals on the chart below, and rate each channel as to how well they're likely to help you meet them, on a scale of 1-5 (1=not very, 5=extremely). Also consider how easy it will be to create content and for your staff to get up to speed on how to use each tool (1= hard, 5= easy).

	Goal #1: _____ _____ _____	Goal #2: _____ _____ _____	Goal #3: _____ _____ _____	Content: How easy will it be for you to produce the necessary content?	Expertise: How easy will it be for you or the right staff members to get up to speed?	Total	Rank
Facebook							
Twitter							
LinkedIn							
Place-Based							
Blogs							
Video Sharing							
Photo Sharing							
Other							

Compile the scores for each channel: Add the numbers in each row and enter that sum into the total category. You already determined the number of social media channels you can afford to commit to—circle that many of the highest ranking channels, and record them below:

\_\_\_\_\_

Look at your list of channels. Do they resonate with you for your organization and its needs? If not, don't be afraid to tinker. Ultimately, only you can decide which channels are best for your organization.

## 7. DEFINING CAMPAIGNS AND MAINTENANCE

We find it helpful to define a structure for the ebb and flow of social media by organizing your strategy into campaigns and maintenance periods, much like you would an email communications or direct mail process. The worksheet on this page will help you develop your first campaign, and to determine what your maintenance strategy will look like.

### Campaign

#### Campaign Plan

**Campaign** \_\_\_\_\_

Start \_\_\_\_\_ End \_\_\_\_\_

Goals \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Who is your target audience?

\_\_\_\_\_

\_\_\_\_\_

What tools will you use?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What will success look like?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Maintenance

#### Maintenance Plan

**Tool 1** \_\_\_\_\_

Who will manage? \_\_\_\_\_

Post frequency? \_\_\_\_\_

Types of info posted? \_\_\_\_\_

\_\_\_\_\_

**Tool 2** \_\_\_\_\_

Who will manage? \_\_\_\_\_

Post frequency? \_\_\_\_\_

Types of info posted? \_\_\_\_\_

\_\_\_\_\_

**Tool 3** \_\_\_\_\_

Who will manage? \_\_\_\_\_

Post frequency? \_\_\_\_\_

Types of info posted? \_\_\_\_\_

\_\_\_\_\_

#### Goals during maintenance

1. To maintain and build audience for future campaigns \_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## 8. THINKING ABOUT TONE AND VOICE

It's hard to find the right balance between personality and mission in your posts. A few "News Items" and "Personal Tidbits" can be useful, but try to steer towards "Social Content". Using the campaign you just defined, write a sample post to fit into each box below (we've provided some examples for a specific upcoming event).

<p>HIGHLY PERSONAL</p> <p>-----&gt;</p> <p>NOT AT ALL PERSONAL</p>	<p><b>PERSONAL TIDBITS</b></p> <p><i>Hanging up the balloon—the smiley face ones are my favorite!</i></p>	<p><b>SOCIAL CONTENT</b></p> <p><i>Behind-the-scenes view (Ex: Picking up Ali Smith, our keynote speaker. She's one inspiring woman.)</i></p> <p><i>Question (Ex: What do you want Ali to address in her keynote?)</i></p> <p><i>Personal and heartfelt (Ex: Just wait until you hear about the winning organizations. I'm so proud to be part of such an amazing community. )</i></p>
	<p><b>IRRELEVANT</b></p> <p><i>What's up with that new American Idol judge?</i></p>	<p><b>NEWS ITEM</b></p> <p><i>Register now for our awards ceremony on Dec 6th at the JFK Center</i></p>
	UNRELATED TO MISSION	-----> IMPORTANT TO MISSION

It's also important to think about whether you're posting as an individual or as an organization. Choose two or three posts from above, and then try them out in both a first person (individual) and an organizational voice.

<p><b>INDIVIDUAL</b></p> <p><i>I just picked up Ali Smith, our keynote speaker. I'm really inspired just to be in the car with her!</i></p>	<p><b>ORGANIZATION</b></p> <p><i>Picking up Ali Smith, our keynote speaker. She's one inspiring woman.</i></p>
---	--

## 9. INTEGRATING COMMUNICATIONS

Your social media channels don't live in a vacuum. Each needs to integrate with each other and with your other communications channel, like email, direct mail, and phone calls. For the campaign you defined, list the core communications channels you'll use and how you'll use them.

Channel	How will you use it to support your campaign?	How often will you use it/post to it?
<i>Blog</i>	<i>To increase ticket purchases for the awards gala, we'll post profiles of nominated organizations, including a photo and a story about their work</i>	<i>One profile per week</i>

To coordinate the different channels, it's very useful to have a communications calendar. Map out when each of the posts and communications above fall on the calendar below. If your campaign is more than a month long, feel free to use your own calendar.

	Monday	Tuesday	Wednesday	Thursday	Friday
<i>Week 1</i>					
<i>Week 2</i>					
<i>Week 3</i>					
<i>Week 4</i>					
<i>Week 5</i>					

## 10. MEASURING YOUR CAMPAIGN

If you don't measure your campaign, it's impossible to know if it worked or how to improve it. Using the pyramid below, map out one potential thing to measure from each of the categories—plus two bonus measures at the bottom. Refer to page 45 for a description of each of these types of measures.

Which goal do you want to measure?

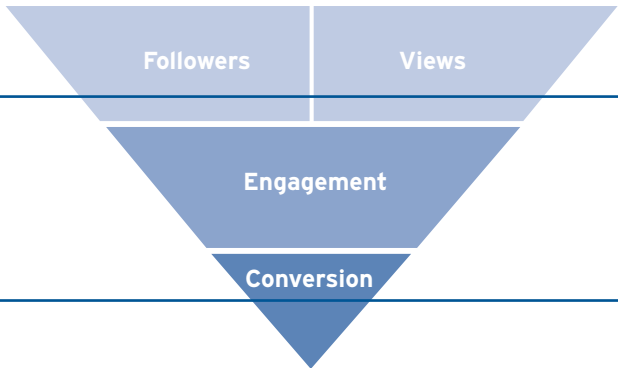
---

How, in general, will you know if you're successful?

---



---

Category	Choose One Metric to Measure	Set Your Numeric Target
<b>Views</b> How many people you're reaching (i.e. page views, impressions)	<i>(i.e. Page Views of Event page)</i>	<i>(i.e. 1,000 page views in May)</i>
<b>Followers</b> How many people have opted to hear from you (i.e. email subscribers, Facebook "Likes", Twitter followers)		
<b>Engagement</b> How many people have actively participated online? (i.e. comments, mentions, re-tweets)		
<b>Conversion</b> What are the tangible, real-world results (i.e. donations, volunteers, registrations)		
<b>Bonus Metric 1</b> (another metric from any category above)		
<b>Bonus Metric 2</b> (another metric from any category above)		

## 11. CREATING A SOCIAL MEDIA POLICY

Having a social media policy can help your staff understand when it's appropriate to get involved and what types of things they should post. Talk with others in your organization about the questions below. You'll likely find the conversations themselves to be useful. For a complete workbook on this topic, see *Idealware's Nonprofit Social Media Policy Workbook*, available for free at <http://www.idealware.org/reports/nonprofit-social-media-policy-workbook>

### SOCIAL MEDIA ROLES

*Who's doing what, in terms of social media?*

Who's in charge of all social media?

---

Who's coordinating between channels?

---

Who's allowed to post to each channel?

---

---

Who's contributing information to be posted?

---

---

### TOPICS

*What topics work well—or not—for you?*

For those allowed to post, what types of things should they generally be posting about?

---

---

---

What topics require approval before posting?

---

---

What topics (if any) shouldn't be discussed?

---

### PRIVACY AND PERMISSIONS

*What should staff do to make sure you respect privacy and permissions issues when you post.*

Photos (of kids or adults)?

---

---

Materials that might be copyrighted?

---

---

Client or Personal Information?

---

---

---

### PERSONAL VS PROFESSIONAL

*Where does professional end and personal begin?*

When is it okay to post something purely personal on an organizational site?

---

---

---

What would **not** be appropriate for staff members to say about you on their personal social media sites?

---

---

---



## 12. HOW SHOULD YOU RESPOND?

It's hard to figure out when and how you should respond to a post about you, or on your own social media sites. Always? Never? What if it's really bad? Think through your own policy for the situations below.

### THE POST IS POSITIVE

In what cases do you respond?

---

---

Who responds? What types of things do you say?

---

---

### THE POST IS NEUTRAL

In what cases do you respond?

---

---

Who responds? What types of things do you say?

---

---

### THE POST IS NEGATIVE

1. Could you turn a complaint into a customer service opportunity? **IF YES** You should probably respond! Who will respond? What types of things do you say?

2. Does the post have misinformation in it? **IF YES** You should probably respond! Who will respond? What types of things do you say?

3. Will it damage your community? **IF YES** Consider taking it down. Who is in charge? What will they do, under what circumstances?

4. Does it include vulgarity or purposely inflammatory language? **IF YES** This gets complicated. Who (if anyone) responds? What types of things do you say? This gets complicated. Who (if anyone) responds? What types of things do you say?

5. Are they likely to keep posting objectionable things simply because you're responding? **IF YES** If none of the above were true, but they're likely to keep posting, it's almost certainly better not to respond.

---

# AUTHORS AND CONTRIBUTORS

---

## Authors

**Andrea Berry, Director of Partnerships and Learning** Andrea oversees Idealware's fundraising and training activities including the Field Guide to Nonprofit Software, sponsorship, corporate and individual giving, grants management and online seminars. Prior to joining Idealware, Andrea held fundraising positions in education, health research and museums and has taught math, performing arts and history in traditional and non-traditional educational settings. She brings a breadth of experience with fundraising software, particularly as it relates to small nonprofits, and has worked as a consultant with nonprofits across New England to help identify appropriate donor management software. Additionally, as a former teacher, Andrea brings front-line tested expertise in curriculum development and training.

**Elizabeth Pope, Director of Research and Operations** Elizabeth Pope leads Idealware's software research projects, conducting interviews and product demos, writing articles and reports, and helping to design project methodology. She earned an M.S. in Library and Information Science from the University of Illinois at Champaign-Urbana, where she honed her research, instruction and tech skills. Before moving to Maine, Elizabeth worked in archives and libraries in New York City for several years. Her background also includes fundraising and content development for nonprofit organizations.

**Chris Bernard, Editorial and Communications Director** Chris is a longtime freelance writer who has worked in journalism, advertising, and corporate marketing and communications, and as a technical writer for several high-tech startups. He brings 19 years of experience telling stories and crafting messages to his work with nonprofits.

**Kyle Andrei, Research Analyst** As Research Analyst, Kyle is responsible for researching software through demos, interviews, and surveys, and using that information to create Idealware's reports and articles. In addition, Kyle also produces Idealware's Ask Idealware videos, drawing on his broadcasting experience. Kyle is a graduate of Indiana State University, where he split his time between managing the student radio station, researching video game communication and working on local elections.