



Getting Started with Social Media:

A Strategy Toolkit for Nonprofits

RITA ALLEN
FOUNDATION





Social Media Is Powerful

Welcome!

This toolkit is designed to help small nonprofits work through the process of developing a solid social media strategy. It is written for organizations considering new social media efforts, but it can also help guide reexaminations of existing efforts. It is meant to be a flexible framework and a jumping-off point. There are many different directions you can take. What's important is to engage in ongoing strategic thinking about your social media efforts.

The toolkit was originally developed to supplement "[Tweeting for a better world](#)," which grew out of an intensive capacity-building project to help a diverse group of smaller nonprofits develop thoughtful social media strategies. The first recommendation is to [read this article](#), which lays out the steps and reasoning behind social media strategy for nonprofits.

Each section of the toolkit also includes links to relevant worksheets on strategy, benchmarking, evaluation and more—ready for customization and collaboration.

In 2015, we updated and expanded the toolkit's content. We revisited the social media efforts of one of the original six organizations, [Educators 4 Excellence](#), and also sought advice and perspectives from three other nonprofits that have successfully engaged diverse stakeholders through social media: [Code for America](#), [DataKind](#) and [Public Lab](#).

Like these organizations, we hope a strategic approach to social media brings you new opportunities for learning, engagement and impact.

Elizabeth Good Christopherson

President and Chief Executive Officer

Rita Allen Foundation

For nonprofits of any size, the ever-changing world of social media can provide powerful tools to engage volunteers, advocates and donors, and to build program offerings and impact. The challenge is how to do social media right — how to develop a strategy that is appropriate for an organization's audience, goals and resources.



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Overview

This toolkit will help you build a social media strategy that connects to your organization's real-world goals. The first template provides an overview of some of the questions the toolkit addresses—think about these questions as you go, and revisit them at the end.

Social media is ripe with diverse approaches and experimentation. The second template asks you to identify and investigate social media programs you wish to learn from on an ongoing basis—including the social media of leaders in your field, organizations with similar goals, and organizations whose approaches you admire.

Key Strategy Questions



Benchmarked Social Media Practices



1

Choose Appropriate Social Media Goals and Connect Them to Organizational Goals

Effective social media strategy flows from core organizational goals. Being clear about your audiences, activities, and intended short-and long-term outcomes will help you identify opportunities to use social media in your work. The templates in this section ask you to revisit these goals, considering your intended impact (what you're trying to accomplish) and theory of change (how you make it happen).

In addition to targeting organizational goals, your efforts should play to social media's strength: encouraging authentic interaction through conversation with your audience. The final template in this section asks you to think about which gaps in your effectiveness social media can best serve.

Intended Impact/Theory of Change Part I



Intended Impact/Theory of Change Part II



Matching Goals with Social Media



2 Define and Understand Your Community

The next step is defining target communities for your specific engagement goals. Are you trying to reach your entire set of stakeholders (volunteers, donors, program participants, etc.) or a subset of these? What kinds of actions do you hope they will take? Also consider what these communities want. What are their social media habits? What will they gain from your social media? The templates below will help you create surveys and interviews to find out how your target communities would like to interact with you via social media.

When you take the time to craft audience personas—representations of your ideal supporters based on a combination of the demographics and other detailed information about specific members of your target audience—you will assure that you are attracting and building your tribe.

In addition, continue to spend time on social media yourself, paying particular attention to your benchmark organizations. Most of all, listen. How can your social media go beyond one-way communication to accomplish your goals and those of your communities?

[Survey Questions](#)



[Interview Questions](#)



[Audience Personas](#)



Photo Credit: Educators 4 Excellence



This popular Facebook post features a video celebrating five years of teacher advocacy by Educators 4 Excellence and includes the voices of E4E's leadership and members throughout the United States.

Bringing a Movement of Teachers Online

Case Study

Educators 4 Excellence (E4E) is a national, teacher-led network that seeks to elevate the teaching profession and foster student achievement by helping classroom teachers learn about and take action on policies that affect their work.

E4E was one of six nonprofits to participate in the Rita Allen Foundation's 2011 capacity-building workshop on developing strategic social media efforts. Since then, E4E has achieved excellent growth in its membership and influence, progressing from a small group of New York City teachers to a network of more than 17,000 members, with five chapters operating in different regions of the United States.

"Following the workshop, we approached our organization's initial work with a greater sense of how to leverage social media as a tool for connecting teachers to one another, to policymakers and to the media," says E4E's cofounder and co-CEO Sydney Morris. "As a result, we've grown from 2,500 followers on Twitter to more than 17,000 and from 400 Facebook followers to more than 5,000. Teachers and even job applicants have shared positive feedback about the news and content we share on social media."

Social media offers valuable tools for connecting E4E's community of teachers, who may otherwise feel isolated in far-flung classrooms. However, social media plays a somewhat different role for E4E than first

anticipated. E4E hosts events to allow educators to learn from one another and discuss the issues that affect their classrooms. At first, social media seemed like a natural venue for extending these conversations beyond the events. But the E4E community found online platforms too public for frank conversations. E4E listened and refocused its social media approach to building event attendance and keeping members interested and involved between events. Read more in "[Tweeting for a Better World.](#)"

Digital Manager Justin Lam helps the organization maintain an active presence on both Twitter and Facebook, with the primary goal of engaging current and potential E4E members. Lam selects blog posts and policy recommendations written by E4E teachers, as well as news articles and other content, to help inform teachers about key policy issues.

E4E is continuing to experiment with ways to make communication a bridge to advocacy and action. Action-oriented posts have included voter guides on local school board elections, graphics distilling complex policy ideas, and petitions to the New York City mayor's office to support the district-wide development of positive school climates. "At the end of the day, it shouldn't be about us being on social media for the sake of social media," Lam says. "It should be about being on social media in order to amplify the voices of teachers who want to be leaders in improving education for their school communities and students."

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- Justin Lam, Digital Manager, Educators 4 Excellence

3 Craft Your Story

One of the most powerful ways to connect with your community is through the power of story. Who are the people you are helping? How are you making a difference? By crystallizing your stories—and inviting your network to share theirs—you can encourage personal connections that lead to impact. Use the template in this section to gather your organization's and community's stories.

Research shows that most people become overwhelmed by issues such as world hunger or childhood poverty. They are simply too big or too far off for us to care about.

When we focus on one individual's story, we can humanize the purpose of our cause, engage our audience's empathy and motivate them to get involved. By focusing your community's attention on one child, that you can engage people to care and act.

Think beyond text: social media is an excellent platform for visual stories told through videos, photos or infographics. Show others how you are changing the world. Can you present before and after photos or videos that tell a compelling story?

See [Additional Resources](#) for tools for collecting and presenting stories.

Also consider opportunities for your leadership and staff members to share their stories and expertise as part of a social media approach that extends beyond your organization's official accounts. By building each individual's influence, you build the influence of the entire group.

Gathering Stories



Photo Credit: DATAKIND

Top Three Most Popular Channels for Nonprofit Storytelling

Social Media **72%**

Newsletters **68%**

Website **67%**

Sharing the Stories behind the Data

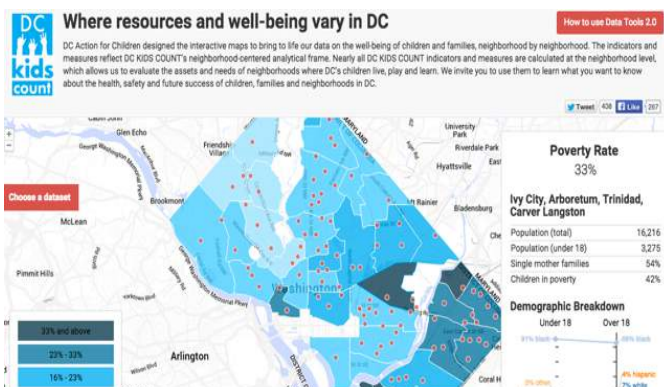
DataKind harnesses the power of data science in the service of humanity by bringing together teams of data science volunteers and social change organizations on projects that address tough humanitarian challenges, from homelessness and human rights to traffic and fire safety.

“Across the world, more than 10,000 individuals—data scientists eager to volunteer their skills, social change makers eager to use data to advance their work, and supporters eager to keep the momentum going—have signed up to get involved with us,” explains DataKind Communications Specialist Miriam Young. “With about 500 new people following us on Twitter every month, social media has been an important tool not only for strengthening our community, but growing it and engaging even more in the Data for Good movement.”

The primary goal of DataKind’s social media efforts is to nurture and connect its global community of volunteers and potential volunteers. “We are humbled by the thousands of people worldwide who have reached out to us wanting to use their skills to give back,” Young says. “Unfortunately, we don’t have enough individual volunteer opportunities for everyone. But through Twitter, we engage people in other ways, providing them with interesting learning resources, connecting them to each other and spreading the word about volunteer opportunities from our peers.”

Twitter is an important channel for highlighting DataKind’s [blog](#) posts—particularly its “Get Involved” monthly roundups of volunteer opportunities, which include projects and events sponsored by DataKind and by other groups—just one example of new content that DataKind created in response to feedback from its community. Young uses [Bitly](#) to track how many people click on social media links to blog posts, and also keeps tabs on the number of shares each post receives. Reporting on these metrics on a monthly basis has helped the DataKind team to evaluate which types of content resonate most through its network and are most effective at raising the organization’s profile. Often, the most shared posts help connect people with ways to help, or illustrate novel ways of applying data science solutions to social challenges.

One notably popular blog post, “[Mapping Youth Well-being Worldwide With Open Data](#),” described how volunteers from DataKind’s Chapter in Washington, D.C., developed a visualization tool that was repurposed by a DataKind U.K.-based team and later by a Code for America group in Kentucky. “With very little promotion, more than 200 individuals shared this story after we featured it in our monthly newsletter,” Young says. “My theory is that our community is interested in stories about the community in action—how individual efforts are building and connecting to have greater impact. This piece illustrated the power of open data, open code and a global community collaborating.”



A widely shared DataKind blog post tells the story of a data visualization project that went “viral,” spreading from a DataKind Washington, D.C., team to other groups worldwide tackling child poverty.

4 Plan for Engagement

Social media offers nonprofits opportunities to engage with their constituents, donors and volunteers as well as other organizations with similar goals. Think of your social media platforms as a place for multidirectional dialogue rather than one-way broadcasts. Identify places where you can have a conversation one-on-one or in smaller groups. Be social!

To spur engagement, consider hosting a live Facebook Q&A or Twitter chat, creating a contest, posting a survey or crowdsourcing ideas for your next program or event. Invite members of your community to guest blog or podcast an interview with a board member. Publicly thank volunteers; amplify the expertise within your community. The more you showcase their ideas, the more tied they will be to the efforts you have underway.

It is also important to monitor conversations on social media channels. People are talking about you, your organization, your programs and the causes that you care about. How and when will you jump in? Use the templates in this section to think through how you can use social media for engagement and to develop a policy for responding to complaints or misinformation about your organization online.

Engagement Strategies



Online Policies and Procedures



Photo Credit: Jeff Warren (CC BY-SA)





A Lively Network of Citizen Scientists

Case Study

The Public Laboratory for Open Technology and Science ([Public Lab](#)) develops open-source hardware and software tools and creates methods that allow citizen scientists to collect environmental data to add to or counter what's made available by government and industry. Using do-it-yourself measurement tools, residents are able to make informed decisions about local environmental risks.

Just as Public Lab opens up the scientific process as a tool for people to positively influence their communities, the organization looks for ways that social media can provide value to its network as part of an “integrated user experience” of engagement, says Executive Director Shannon Dosemagen. Public Lab’s Facebook and Twitter accounts are proving to be powerful tools for expanding its community and spreading resources, especially as people increasingly turn to social media feeds as their primary sources of news and information.

The organization’s website is itself an interactive wiki and publishing platform—an open forum for community members to post stories, data and step-by-step instructions. The language of social media is built into Public Lab’s pages as something people are familiar with: visitors can “Follow,” “Like” and comment on individual posts.

Public Lab’s presence on social media evolves with its community. Messages that generate high numbers of shares and likes help shape posts going forward. Videos tend to be highly effective for reaching new audiences and sharing stories and how-to instructions. And new networks are branching off organically—

for instance, a chapter in Spain supplemented its mailing list with a Twitter account to better serve its community. A Web Working Group, a team of five staff members and community organizers, compiles monthly reports on the growth of mailing list subscribers, user-contributed research notes and wiki pages.

Ultimately, Dosemagen says, each of Public Lab’s portals for online interaction needs to pass a key test: “Is it leading to a more meaningful experience? You can tweet all you want, you can post Facebook content, but if it’s not creating a stronger engagement in the lifecycle of data, what’s the point?”

Understanding the ins and outs of engagement is not simple. Public Lab is partnering with science and environmental education specialists at the University of California, Davis School of Education, to more comprehensively assess the roles of social media and communications in deepening the engagement of citizen scientists. This research, which is supported by the Rita Allen Foundation, is intended to create a framework that can be used by other organizations.

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- Shannon Dosemagen, Executive Director, Public Lab

5 Create a Content Strategy

Social-sector organizations often find themselves pursuing important efforts with limited resources. Consider strategies for using social media efficiently, including repurposing your content when possible.

Once you have written a blog post or email newsletter, how can you highlight key ideas on your social media platforms to cultivate conversation, build and extend community, and harness the energy and passion around your nonprofit's mission? After a key presentation at an annual event or local conference, how might you highlight major points in a blog post or share the slides from your talk? How can you repurpose relevant images and infographics across your social media platforms?

Use the template in this section to plan a quarterly calendar of your social media content. Consistency is more important than quantity of posts. Strive for a set schedule so people begin to look forward to your updates every Tuesday, for example.

Once you've created your strategy, it pays to revisit it often. Social media moves quickly and so does your audience. Regularly check in to be sure you're active on the platforms that matter to your community.

Social Media Calendar



This tweeted quote by Code for America Founder and Executive Director Jennifer Pahlka continued to generate engagement well beyond the organization's annual Summit.



Code, Video and Inspiration

Code for America believes government can work for the people, by the people, in the 21st century, if we all lend a hand. In collaboration with communities, government staff and technologists, Code for America builds and encourages digital products and services that make government simpler, more effective and easier to use.

Code for America uses social media to keep in touch with its broad network of [government partners](#), current and former [fellows](#), and local [Brigade](#) volunteers from around the world (more than 40,000 volunteers at last count). The Marketing and Communications team focuses the bulk of its efforts on Twitter, but also maintains a presence on YouTube, Facebook and Github. Code for America's strategy is to elevate the voices of its network and be a good partner by sharing information and inspiration that speak to its audience.

“The people who are connected to our network really want to use their skills for good —they want to do something,” says Marketing Manager Zoe Blumenfeld. “Twitter is a great place for them to connect as professionals to ideas and opportunities. Facebook is more of a place to spread mission-oriented content — especially images and videos.”

The annual [Code for America Summit](#) is a dynamic, in-person convening of government innovators, technologists and other partners, and Code for America uses digital platforms to bring the event to broader audiences. Between 2014 and 2015, the number of tweets referencing the hashtag [#CfASummit](#) nearly doubled, while the reach of Summit-related messages tripled; the event's hashtag was trending nationally for four hours.

Blumenfeld attributes this growth in part to higher attendance levels, as well as to the popularity of tweets including inspirational quotes from the Summit. Her team pushes to post videos from the event as quickly as possible, but also views them as evergreen content. “People have been sharing the videos well after the event,” she says. “We invest so much in the Summit that we would hate to have the content just live there. So we use it throughout the year and repackage it in different ways. It's not framed as, ‘this happened at an event.’ It's more like, ‘these are the practices and principles that make up our work.’”

“People have been sharing the videos well after the event. We invest so much in the Summit that we would hate to have the content just live there. So we use it throughout the year and repackage it in different ways. It's not framed as, ‘this happened at an event.’ It's more like, ‘these are the practices and principles that make up our work.’”

- Zoe Blumenfeld, Marketing Manager, Code for America

6 Determine What to Measure

In some ways, measurement in the online world is easy. Followers, likes, views, comments, social media mentions—each can be counted and tracked. Every quarter, set measurable goals for improvement, such as increasing the click-through rate to your website from Facebook and Twitter by 15 percent, increasing likes and shares of your posts by 20 percent over the next six months, or increasing the social media mentions of your organization by 10 percent.

Consider how to connect your social media goals to your overall organizational goals—for instance, by assessing your reach with targeted stakeholders through periodic surveys and asking event attendees what brought them there. Ultimately, you're measuring resonance, relevance and reach. Ideas light up the world if they resonate with people. Ideas resonate if people find the message relevant and the messenger credible. Audiences are likely to share messages that excite them. This extends your reach.

Set up alerts for social media mentions of your organization's name, your key ideas and hashtags and your top stakeholders. See [Additional Resources](#) for tools for monitoring social media channels.

The templates in this section help you work through the process of defining what you will measure and how you will define short- and long-term success.

What to Measure



Definition of Success and Targets



7 Allocate Resources to Get the Job Done

- On a more practical level, you will need to consider how your social media work will fit into your organizational resources and structure. While many social media tools themselves are free, the first template in this section walks you through potential start-up costs for social media.

What will drive ongoing costs is staff time—the time it takes to create content, to post, to respond to comments (including challenging ones), to analyze what’s working and to test new approaches. The second template provides a framework for projecting staff time.

The third template will help you decide who within your organization will be taking on social media roles, including creating and approving content and strategy. As you delineate these roles, assess whether your team members feel well equipped to tell stories, to share updates, to post photos from live events. If not, a series of training sessions on storytelling, mobile or social media might be in order.

If you don’t have sufficient team members to do everything you wish, think about enrolling volunteers. If ten people spend one hour a week online sharing content that you’ve prepared in advance for them, your reach will expand exponentially.

Also consider creating a formal policy covering social media conduct and official procedures in the event that something goes wrong.

Projected Initial Social Media Costs



Projected Ongoing Costs: Staff Time



Key Processes and Roles



8 Experiment, Monitor and Modify

Social media lends itself to learning by doing. Experiment with different approaches and see what works for your audiences. The last template will help you think systematically about experimentation and modification.

Throughout your efforts, try to understand how your communities are reacting to your social media, not only online, but in the wider world of your organization's work. Which of your actions are expanding your reach to new target audiences who are potential donors, volunteers and influencers? Which are raising your profile and building engagement with others who are working on the same issues or in the same community? Listen, learn, try new things and have fun.

Learning Agenda



Photo Credit: Code for America



RAF

Getting Started with Social Media: Worksheets





Key Strategy Questions

A successful social media strategy answers several important questions linking to your organization's real-world goals. The templates that follow will help you work through these questions, but it's a good idea to have them in mind from the start.

Goals

Which impact or organizational goal(s)* have you decided to focus on in your social media efforts?

Rationale

How will social media advance the goal you selected?

Target Audience

Who is your target audience to achieve this goal?

Audience Behavior

What are the social media habits of the audience you selected? What will they get from your campaign?

Tools

What tools will you use?

Audience Use of Tools

How will your target audience use your social media tools?

Approach

How will you use the tools? What is your approach trying to accomplish?

* Example Organizational Goals: Donor Engagement, Donor Retention, Engaging Community, Generating Brand Awareness, Building Thought Leadership.



Benchmarking and Landscape Research

Select 4–5 benchmark organizations whose social media you will track, including leaders in your field, organizations with similar goals, and organizations whose social media approaches you admire. Visit their social media profiles/websites, considering the below points, and conduct follow-up interviews if you have questions.

Organization Name:

| | |
|------------------------------------|--|
| | |
| Type of organization | |
| Audience | |
| Platforms | |
| Number of followers | |
| In what ways are we aligned? | |
| How do they engage their audience? | |



Intended Impact/Theory of Change I

Social media strategies should flow from your organization's goals—your intended impact (what you're trying to accomplish) and theory of change (how you make it happen). To have a successful social media strategy, you first have to be clear on your intended impact and theory of change. Social media can enhance or deliver on parts of programs created around your theory of change. It can also play a role in achieving organizational goals, such as fundraising and brand awareness.

Who?

Whom do you wish to benefit (age, ethnicity, gender, geography)?

What?

What outcomes do you hold yourself accountable for? What can be measured to demonstrate achievement of these outcomes?

Why?

Why do these outcomes not currently exist? What are the obstacles?

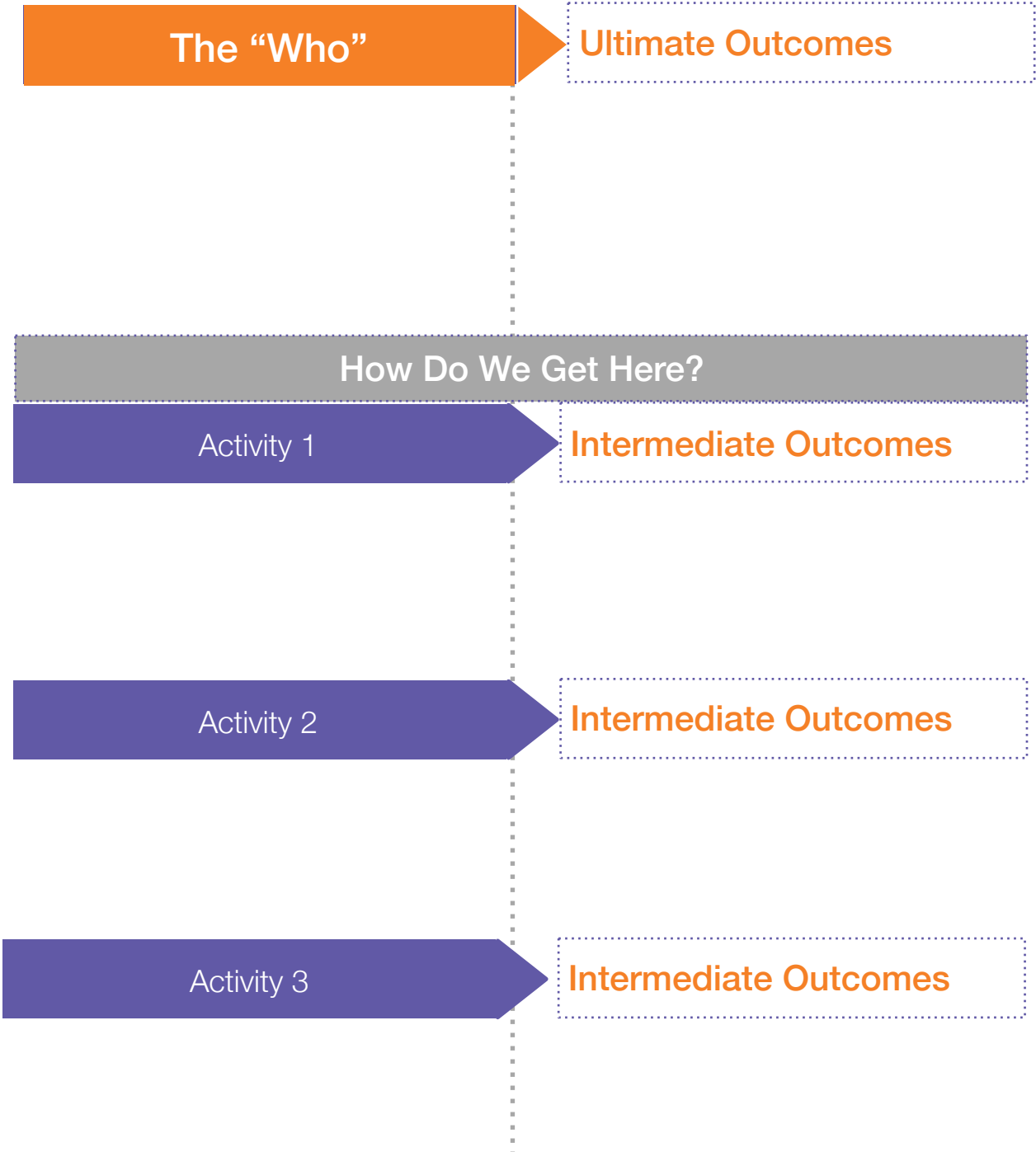
How?

What evidence is there that your actions will lead to your target outcomes? What will you do to address the obstacles?



Intended Impact/Theory of Change II

An organization's intended impact should be realistic, time-specific and measurable and it must be placed in the overall context of broader social change. Your organization's key activities are what bring those you serve closer to the ultimate outcomes you envision, via a set of intermediate outputs. Laying out these linked parts will help you identify opportunities to use social media to enhance your efforts. Enter your information below.



*Source: Bridgespan Client Work



Matching Goals with Social Media

Your social media strategy should target essential needs in your theory of change. It should also play to social media's strength: encouraging authentic interaction through conversation with your audience.

Where are there pressing gaps in our theory of change?

How can social media address this gap?

How appropriate is this goal for social media?

How can social media address this goal?



Survey Questions

These are starter questions—edit them and add more. Use question #2 to test out tactics you are considering, (e.g., a Facebook contest or a Twitter account with a particular focus). Use surveys to test emerging hypotheses at the start of a new initiative, when you want to reach a large number of people and receive more, higher-level answers.

1

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

Choose one: Never | Occasionally | Daily | Several times a day

| Personally | Professionally |
|---------------------------------|----------------|
| Use Facebook? | |
| Use Twitter? | |
| View videos on YouTube? | |
| Read other people's blogs? | |
| Write posts for a blog? | |
| Comment on posts you read? | |
| Post videos online? | |
| Post photos online? | |
| Share something you see online? | |
| Give to causes online? | |



2

If [Organization] were to try the following, I would likely:

Choose one: Not participate | Participate occasionally | Participate frequently | Participate/encourage others to participate

Idea

Survey Answer

Idea 1

Idea 2

Idea 3

Idea 4



Interview Questions

Use interviews to test emerging hypotheses at the start of a new initiative, when you want to ask targeted, in-depth questions and probe deeper on responses. Use the findings of interviews and surveys to determine which audience segment is ripe for social media, how they use social media, and what incentives would motivate them to participate in your social media efforts. The questions below are possible starter questions for a new social media effort; edit, add to and change the questions to reflect what you'd like to learn. Plan for 30–60 minute interviews with 3–5 individuals, either in person or over the phone.

1. Which social media platforms are you currently using?
2. How often do you use these platforms?
3. For what purpose are you using each of these platforms? (e.g. to stay connected with friends, to stay up to date on a particular issue, etc.)
4. Does the platform you use vary depending on the purpose?



Interview Questions - Continued

5. If we were to participate on X social media platform [be specific if you want], how likely would you be to engage?
6. Which social media platform would you be most likely to use to connect with us?
7. Is there anything we could do to encourage your active participation? (e.g., host contests, provide a certain type of information, etc.)
8. How often would you like to see new information from us on your favorite social media platform?



Audience Personas

Creating audience personas helps you to gear your social media efforts to your target audiences (donors, volunteers, etc.) You may have several different target personas that have little overlap, which will inform your social media efforts. Use these questions to guide your persona development. You may not answer every question.

Persona name:

Choose a descriptive name that brings to mind each target audience.

Background:

What is their personal and/or professional background?
What is their lifestyle, interests, hobbies and education?

Demographics:

What is their age range, gender, household income? Where does he/she live (e.g., urban/suburban/rural)?

Key characteristics:

What are some key identifiers of this persona? What interest or habit makes them unique and memorable?

Ecosystem:

Who is in this person's ecosystem?
Whom do they trust and rely on for information?

Goals:

What are their aspirations?
What are they hoping to achieve in order of priority?



Audience Personas - Continued

Challenges:

What stands in their way to achieving these goals? What annoys them?

How we help:

In what ways do you help them overcome their challenges and/or achieve their goals? What's in it for them to be involved with your efforts?

Quotes:

Include actual quotes from the interviews you have conducted that represent the persona.

Common objections:

Identify the most likely objection this persona will have to getting involved with your organization or efforts.

Aligned:

How clearly is he/she aligned to your efforts? Does he/she not see the problem yet? Is he/she fully committed? Or somewhere in between?

Other commitments:

Where else are they committed? What other organizations or activities take up their time? Where and why do they donate?

Message:

How will you communicate with this type of audience? How will you get them to engage?



Gathering Stories

Uncover stories to share on social media by speaking with your staff, your supporters and the people your organization serves. Use the checklists below to prepare for your story-gathering efforts. Add your own ideas as needed. Most stories have a “hero” — who are the heroes in your organization? (Donors, volunteers, beneficiaries, staff?)

Staff

- Do we have a way to preserve the stories we are gathering (shared hard drive, cloud based storage like Dropbox or Google Drive)?
- Does our team have the skills (interview skills, storytelling skills) required to effectively gather stories?
- Does our team have the equipment (software, recording equipment) required to effectively gather stories?
- Do we have standard intake forms, release forms or interview questions prepared and available?
- Have we established a way to share the stories we gather internally so that everyone can use them?
- How will we feature our staff as “heroes”?



Beneficiaries

- Have we decided when we will gather stories from our beneficiaries? (Before, during, after?)
- Have we decided how often we will gather these stories? (Weekly, monthly, annually?)
- Do we have an established process for gaining permission to use these stories?
- Have we determined how to make it easy for our beneficiaries to share their stories? (Online surveys, in-person interviews, testimonial videos?)
- What is the information we most want to know from our beneficiaries?

- What is the best way to measure our impact?

- How will we feature our beneficiaries as "heroes"?

Donors, Volunteers and Other Supporters

- Have we decided when we will gather stories from our donors, volunteers, etc. (At annual events, during donor calls, at recognition days?)
- Have we decided how often we will gather these stories? (Weekly, monthly, annually?)
- Do we have an established process for gaining permission to use these stories?
- Have we determined how to make it easy for our community to share their stories? (Online surveys, in-person interviews, testimonial videos?)
- What is the information we most want to know from our community?

- What is the best way to measure our impact?

- How will we feature our community as "heroes"?



Engagement Strategies

The key to success online is to think about engagement rather than one-way broadcast. To identify opportunities to increase your engagement online, answer the questions below. Use your answers to inform your social media calendar.

Whom should we amplify?

- Are there others talking about our organization online?
- Are there other organizations working to address the same challenges we are?
- Who are the top influencers online who talk about the issues we care about? What companies have aligned their efforts with our cause?
- What celebrities have aligned their efforts with our cause?
- Who is writing about the issues we care about? (bloggers, researchers, academics, journalists, government organizations)

Whom in our community should we highlight?

- Whose voices resonate with others?
- Who has shown the most commitment to our cause?
- Who has expertise in our arena?
- Who has a community of followers that we'd like to reach?
- Whom do we want to thank?
- Who has been impacted by our work?
- Who can share a great story about the impact we are having?



In what ways can we best tell our story and showcase our cause? (add your own ideas)

- Interviews (in person, video, audio, written)
- Invite others to guest blog
- Host a survey
- Invite others to share, follow, forward, favorite, +1
- Conduct a contest
- Invite volunteers to live tweet an event
- Share images or infographics
- Crowdsourcing ideas
- Share videos
- Create and share how-to videos
- Share audio files
- Create and offer a class
- Convene an online event



Online Policies and Procedures

Documenting online policies and procedures and assuring all members of the staff and all stakeholders know them in advance will avoid surprises. While it may never be needed, take the time to think through possible scenarios in advance and set policies and procedures to address them.

Add any questions that might be unique to your organization.

1. Who has been approved to speak on the organization's behalf online?
2. Are there levels of approval?*
3. How should staff refer to the organization?
4. Are staff members encouraged to share their point of view online? Are there any limitations on staff engagement online?*
5. Are there certain topics/subjects that we will not comment about online?
6. Are there times of the year that we must be active online? (holidays, remembrance days, awareness day/month) Why?
7. Are there times of the week, month or year that we should not be active online? Why not?



Online Policies and Procedures - Continued

8. Who is approved to comment online when the organization has been criticized or targeted?*

9. Who is approved to comment online when one of our staff has been criticized or targeted?*

10. Who is approved to comment online when one of our stakeholders (donors, partners, beneficiaries) has been criticized or targeted?*

11. What is the standard disclaimer to be used when publishing online about the organization?

*These guidelines can be outlined in the roles worksheet.



Photo Credit: Teradata Partners User Group 2014



Social Media Calendar

Customize a monthly (or quarterly) calendar to serve as a guideline for your online activities.

| SUN | MON | TUE | WED | THU | FRI | SAT |
|-----|-----|-----|-----|-----|-----|-----|
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Color Coding

| | | | | | | |
|----------|-----------|----------------|----------------|------------------------|----------------------|---------------------------|
| No Posts | Blog post | Upcoming Event | Amplify Others | Highlight Stakeholders | Survey or Crowdsorce | Share Video or Audio File |
|----------|-----------|----------------|----------------|------------------------|----------------------|---------------------------|

For a more sophisticated social media calendar, sign up for a free account with [Buffer](#). Other tools for managing your social media queue are [Hootsuite](#) or [Edgar](#).



What to Measure

While surveys and interviews are used to understand audience behavior at the start of a new initiative, evaluation should be done on an ongoing basis using available metrics. Longer-term metrics might include number of people attending events and the number of new donors; short-term metrics might include number of likes and followers, average number of shares for a Facebook post, and the frequency of retweets and mentions. Other metrics might include the number of times your organization is mentioned online, how large a following you are gaining for event hashtags you create, or the number of times people are quoting and talking about your ideas.

| | | |
|------|-----------------|----------|
| Goal | Target Audience | Platform |
|------|-----------------|----------|

| | | |
|----------|---------------------|--------------------|
| Approach | Longer-term Metrics | Short-term Metrics |
|----------|---------------------|--------------------|



Definition of Success and Targets

Being clear on targets for each platform and setting specific timeframes will help in measuring success. Interim and daily targets should build toward ultimate goals. Interim targets could include “followers will increase to X” or “number of users taking action will increase by Y%”; daily targets could include “Z% of active users will view & comment on posts.” To keep social media goals on track, be clear on who evaluates results and how often. For instance, a social media manager might track daily targets each day, while an executive director might review interim targets monthly and long-term goals quarterly.

Long-term Goal

Timeframe

Interim Targets

Daily Target



Projected Initial Social Media Costs

Getting started with social media doesn't require a great deal in terms of initial investment in products and services. For most organizations, custom-built social media tools aren't necessary. Facebook and Twitter are great places to start.

PRICE APPROXIMATIONS AS OF FALL 2015

| Initial Investment | Product/Service | Range of Costs |
|-------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|------------------------------------------------|
| EQUIPMENT | Computer equipment | \$199–2,500/year |
| Your estimated costs: | | |
| SOCIAL MEDIA PLATFORMS | Facebook, Twitter, YouTube, Pinterest, Instagram | Free |
| ONLINE COMMUNITY | Ning, Mightybell, Facebook Group | Free—\$1200/year |
| Your estimated costs: | | |
| MEASUREMENT TOOLS | Facebook Insights, Google Analytics, Topsy (for Twitter), YouTube Analytics, Klout, Social Mention, Sprout Social | Free—\$700/year |
| Your estimated costs: | | |
| INITIAL CONTENT & STRATEGY DEVELOPMENT SOCIAL MEDIA STRATEGIST | Social Media Strategist (10 hours week, \$100/hour) | ~\$13,000/3 months (10 hours/week, \$100/hour) |
| Your estimated costs: | | |
| TRAINING | Workshops Webinars | \$300/workshop Free—\$75/webinar |
| Your estimated costs: | | |
| TOTAL PROJECTED INITIAL INVESTMENT | | |



Projected Ongoing Costs: Staff Time

Ongoing social media costs are largely driven by staff time. These time estimates are starting points for small organizations just getting involved in social media. For such organizations, having a meaningful presence on Facebook and Twitter can take a minimum of a quarter to half of one full-time staff member’s time. How much staff time you will need to devote to your social media strategy depends on a variety of factors, such as how many channels you use, how frequently you post, how closely you want to manage the community, and how many voices you want in the channel.

| CATEGORY | ACTIVITY | APPROXIMATE TIME REQUIRED | TIME |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|------|
| Content | <ul style="list-style-type: none"> Screening for relevant third-party content Screening audience content | <ul style="list-style-type: none"> 2-6 per week 1-5 hours per week | |
| Web | <ul style="list-style-type: none"> Posting to social media tools Responding to comments/questions Surfing relevant web and social media sites | <ul style="list-style-type: none"> 2-6 hours per week 1-4 hours per week 2-5 hours per week | |
| Measurement | <ul style="list-style-type: none"> Measuring results of social media tools Evaluate progress towards goals Quarterly strategic review | <ul style="list-style-type: none"> 1-3 hours per week 4 hours per month 3-6 hours per quarter | |
| TOTAL PROJECTED TIME | | | |



Key Processes and Roles

Adjust staff titles to fit your organization, and add as many columns as needed for those with a role in social media. Add and edit procedures to fit activities that are delegated to different people. For instance, different types of posts may be handled by different people. In order to mitigate risks, you may want to put in place a formal policy covering personal social media conduct (how staff refers to the organization, disclaimer to be used when publishing elsewhere, which guidelines of the employee handbook apply) and official procedures (who needs to know if something goes wrong, who gives official responses, confidentiality agreements).

PROCEDURE

RESPONSIBILITY TO CREATE OR APPROVE

| | Executive Director | Program Manager | Content Creator |
|--------------------------------------------------------------|--------------------|-----------------|-----------------|
| 1. Update Facebook X times/ week | | | |
| 2. Measure daily goals on Facebook and Twitter | | | |
| 3. Create /solicit new content X times/month | | | |
| 4. Respond to posts, comments and questions within X time | | | |
| 5. Measure progress towards achieving targets X times/ month | | | |
| 6. Review social media strategy X times/year | | | |
| 7. Provide official response in case of an issue* | | | |

* Use the policies worksheet to outline additional details as needed.



Learning Agenda

This is a template to guide you through the process of experimenting, monitoring, and modifying your social media efforts based on their results. Print and complete additional copies as needed.

Learning Agenda Question

Questions should reflect the goals you're trying to achieve with social media, like "Will the benefits of social media effort X justify the resource requirements?"

Information Required to Answer

Inputs needed to answer the question, such as how much staff time is required for an effort, or which issues are most interesting to users.

Approach and Timeline

Describe the methods (including surveys, interviews, metric tracking) that will be used to answer the question and in what timeframe an answer can be expected.

If the Answer Is "No," We Will Discuss:

What can be revised if examination reveals that the effort isn't meeting its goals?



Additional Resources

More on Defining Your Organizational Goals

The Bridgespan Group

A rich collection of resources related to building nonprofit strategy

Reports on Social Media for Nonprofits

Nonprofit Quarterly

A study from the Case Foundation and Social Media for Nonprofits, based on a survey of almost 500 nonprofits

Tools for Social Media Management and Measurement

Hootsuite

One of several tools for managing social media across platforms, allowing multiple people to schedule and review posts

Google Analytics

Track social media referrals to your website

Tools for Social Media Monitoring

Google Alerts

Set up alerts for online mentions of your organization's name and your key stakeholders

Newsle

Monitor when your organization, board members or key donors make the news

Twilert

Set up Twitter alerts for your organization, cause, influencers or any keyword

Tools for Story Collection and Presentation

The Chronicle of Philanthropy

Various resources for nonprofit storytelling

Canva

A free tool that helps you improve the look of your content and quickly reformat an image to fit the requirements of Twitter, Google+, PowerPoint and other platforms

Piktochart

An easy way to create powerful infographics

Facebook Resources for Nonprofits

Nonprofits on Facebook

Facebook for Social Good



Additional Resources - Continued

Twitter Resources for Nonprofits

Twitter for Nonprofits

Notable Commentators, Blogs and Books

Beth Kanter

Author of *Measuring the Networked Nonprofit* and Beth's Blog, one of the longest-running and most popular blogs for nonprofits

Heather Mansfield

Nonprofit Tech for Good
Author of *Mobile for Good* and *Social Media for Social Good*

Social Media for Nonprofits

Denise Brosseau

Ready to Be a Thought Leader?

References

[21 Social Media Tips for Nonprofits](#)

[The 7 Steps to a Successful \(and Agile\) Social Media Strategy](#)

[A Strategic Guide to Social Media for Nonprofits](#)

Special thanks to Denise Brosseau of [Thought Leadership Lab](#) for her help with the 2015 edition of this toolkit.





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