Social Media Best Practices for Nonprofit Organizations

A Guide

Clarke Cole

June 2014
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Section 1.0, section 2.0, and each individual module are available on the CCGHR website in one complete document. Individual modules are also available for individual viewing and download. All of this can be accessed online at: [http://www.ccghr.ca/resources/social-media-modules](http://www.ccghr.ca/resources/social-media-modules).

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1.0 Introduction to the Guide

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The Canadian Coalition for Global Health Research (CCGHR or the Coalition) is a not-for-profit organization promoting better and more equitable health worldwide through the production and use of knowledge. **With an orientation toward health research challenges in low and middle-income countries (LMICs) to reduce health disparities, the CCGHR is a Canada-based global network committed to:** strengthening capacities of individuals, institutions and systems in Canada and LMICs to produce and use knowledge; speaking as Canada’s voice for global health research; building effective, equitable and respectful south-north research partnerships; connecting people, ideas and expertise, and; learning from and communicating our work. CCGHR members include global health researchers, people actively engaged in applying research to improve global health, organizations interested in funding health research, and members of the general public who share our vision and goals. The CCGHR began in 2001 as an informal network and has evolved through generous support from the former Canadian International Development Agency (now the Department of Foreign Affairs, Trade and Development), the Canadian Institutes of Health Research, Health Canada, the International Development Research Centre and other foundations. The Coalition is a registered Canadian charity and is governed by a volunteer Board of Directors.

A note on the author:
Clarke Cole is a recent graduate of the Honours Bachelor of Health Sciences Degree, specializing in global health, at McMaster University in Hamilton, Canada. Clarke prepared this manual as an independent research course at McMaster University in collaboration with the CCGHR. She is currently the co-founder and President of the McMaster CCGHR Student Chapter, the first of its kind in Canada, and is involved in various Coalition activities at McMaster University and at the national level. Having completed research related to social media and global health research in the past, she has prepared this manual to help guide the CCGHR and other similar organizations in creating and executing effective social media strategies. She is currently involved with research related to and execution of CCGHR internal and external communications strategies, including social media management for the CCGHR.

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Acknowledgements

*Special thanks to Dave Heidebrecht and Vic Neufeld for their supervision and guidance in the preparation of this manual.*

Mission Statement

This guide to social media use for non-profits was created to enable the CCGHR in developing and executing its own social media plan as a part of existing communications strategies. In response to the growing need for non-profit organizations to adopt social media strategies that are both effective and sustainable, given their resource limitations, this guide was designed. Accordingly, it is hoped that the guide will provide useful to the CCGHR and similar non-profit organizations in engaging in successful social media practices.

2.0 History of CCGHR Experiences

1.1 Previous Communication Tools

The Canadian Coalition for Global Health Research (CCGHR or “the Coalition”) began as an informal network in 2001 and has since grown to be an important Canadian nonprofit organization with the mission of promoting better and more equitable health worldwide through the production and use of knowledge. The main programs of the CCGHR are capacity development, policy influence, and networking. In order to achieve success in these areas, the Coalition must rely heavily on effective communication strategies. This includes internal communication that occurs between CCGHR members, located across the globe and from various fields and stages in their careers (students, global health researchers, organizations, members of the public, and more). It also includes communicating with external audiences, disseminating knowledge to the public and to policymakers, engaging in discussion on important topics in global health researchers, and expanding the Coalition network in meaningful ways.

The rise of social media has vastly changed the nature of conversation between nonprofit organizations and their audiences. Nonprofits are able to communicate with supporters and the public in new ways, and furthermore, these populations have new expectations of how they will be communicated with. Given its nature as a networking and advocacy organization, there is great potential for the CCGHR to use
Social media tools to its advantage. Various goals of the CCGHR are already in line with the strengths of social media. Importantly, the CCGHR's goal to foster a global health research network is highly compatible with one of social media's main characteristics: building and strengthening diverse networks. Social media reduces geographical barriers immensely, facilitating communication within global networks that the CCGHR works to achieve. More recently, mobile social media platforms have facilitated more equitable access to digital conversations, on a global scale, than ever before. Social media has many roles; it facilitates wide-scale dissemination of information, it allows meaningful, ongoing conversations to occur within networks, and it provides digital workspaces for users to collaborate on the production of knowledge. In summary, the benefits of social media are parallel to the goals of the CCGHR, and the potential to use these new digital tools to reach the Coalition's objectives is enormous.

In order to understand how the CCGHR can successfully utilize social media tools, we must first understand existing communication strategies of the organization. By doing so, any new communication strategies centred around the use of social media tools can be integrated appropriately.

The Coalition has published various communication strategies since 2001, each one building on the last to promote the best communication practices possible. Documents of interest, which are available through the CCGHR, are:

- Strategic Plan 1 – 2005 – 2007
- Strategic Plan 2 – 2007 – 2009
- Strategic Plan 3 – 2010 – 2014
- Strengthening the Network Concept Note – 2009
- Online Social Networking Concept Note – 2009
- Communications Plan – 2011
- Historical Scan – August 2013
- Online Engagement Final Report – August 2013

The inclusion of social media strategies in these documents is highly reflective of the evolution of social media over the past ten years or so. Early documents do not reference the use of social media but over time, the need for a CCGHR social media strategy was recognized. For example, while Strategic Plan 1 and 2 only speak to the need for a CCGHR website, Strategic Plan 3 goes one step further, identifying the need for social media tools to be utilized via the creation of an online social networking community. Next, Strengthening the Network Concept Note makes valuable inquiries about the lessons of social networking, and the more recent Online Social Networking Concept Note considers possibilities for social media strategies in concrete terms. For a deeper understanding of these documents, refer to them directly, or to Historical Scan: a document that summarizes CCGHR communication strategies over the years.
Social Media Best Practices for Nonprofit Organizations
Canadian Coalition for Global Health Research

Despite recognizing the need to engage in social media, no strategies have been integrated into CCGHR communication plans yet. Given the changes social media has brought to the ways in which we communicate, there is immediate need for the Coalition to bring together previous social media plans and experiences into a comprehensive strategy for the future. This strategy must be well-informed by the relevant literature, and be adaptive to further changes in the social media landscape, as they occur.

1.2 Current Social Media Use

The CCGHR initiated its presence on social media in February 2013, with the creation of Facebook and Twitter accounts. In addition, the organization engaged in its first blogging activity in 2013 through a CCGHR research project, ‘Gathering Perspectives’. This social media activity was complimented by the launch of the CCGHR’s new website in May 2013, which hosts the Coalition’s blog.

The following details will provide an account of social media activities from May to August 2013. Over Facebook and Twitter, the CCGHR promoted global health news, events, and job postings. Each day, the CCGHR posted 0-3 posts on Facebook and 3-20 tweets on Twitter. Facebook followers grew from 35 to 161 on Facebook and from 155 to 475 followers on Twitter. The CCGHR also posted 10 blog entries through the Gathering Perspectives blog. At this time, all social media activity was managed by one social media manager who was working approximately 21 hours per week. Refer to the Online Engagement Final Report, prepared in August 2013, for a detailed summary of the CCGHR’s current social media activities, including analytics.

Since August 2013, social media management has been jointly conducted by two CCGHR members. Resources became more limited than May to August 2013, thus there is no current summary on social media activities from the past four months (September to December 2013).

The CCGHR has seen measurable progress in its social media activities, disseminating information and knowledge to the public, engaging in meaningful conversations online, and significantly increasing the size of its’ online network. It has also learned valuable lessons in social media activities that can be applied in the future. However, much can still be done to improve the organization’s success using social media. The next section will reflect on major lessons learned through social media activity in 2013.

1.3 Lessons Learned

The following lessons in social media activity have been summarized from the document Online Engagement Report, from August 2013. For a more detailed
account of learning since the CCGHR began to use social media, refer to this document directly.

**Determining goals.** The CCGHR needs to develop a clear understanding of why it is using social media that is understood across members. It should set goals and priorities for future social media use.

**Establishing our presence.** The CCGHR must understand what it wants its social media voice to be, determine who is qualified to act as that voice, and strengthen this voice online.

**Curating content.** In communicating its voice, the CCGHR must consider what type of content it wants to contribute on each social media platform. Additionally, the timing and frequency of this content must be decided on deliberately.

**Creating a dialogue.** In order to spark the type of dialogue the CCGHR aims to over social media, it must establish a stronger online community.

**Responding.** The CCGHR requires a clear set of guidelines for responding to social media comments. Social media managers should be clear about their roles and responsibilities, and there should be a support system in place to guide them.

**Being realistic.** Setting goals and expectations for social media engagement by the CCGHR is important. The Coalition must keep in mind the resources that are necessary to build a strong social media presence. It is recommended that a minimum of 15 hours per week is spent on online engagement via social media platforms. A plan should be developed for who will contribute this time in the future.

**Integrating with internal communications.** The CCGHR requires a plan for how social media will facilitate both external communications (with publics, potential supporters and members) and internal communications (with current CCGHR members). There should be a plan outlining how to engage with members over social media effectively.

**Connecting with Low and Middle-Income Countries (LMICs).** In order to facilitate conversation with LMIC partners, the CCGHR must make concerted efforts, including providing social media teaching tools on the CCGHR website (to increase knowledge) and collecting social media information from members when they sign up.

**Continued learning.** In order to have a sustainable and continued presence on social media, the CCGHR must continue to reflect on its experiences through periodic reports and summaries of social media activities. This should include analytics for measuring success on social media.
1.4 Looking Forward

In the future, the CCGHR must make it a priority to strengthen its social media presence, by bringing together previous social media plans, experiences and learning into a cohesive social media strategy. The remainder of this guide, Social Media Best Practices for Nonprofit Organizations, will explore the various factors that an organization such as the CCGHR must take into account in order to achieve success with the use of social media.

3.0 Social Media Basics

Module 1: What is Social Media?

<table>
<thead>
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<tbody>
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<td>At the end of this module, readers should understand:</td>
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<tr>
<td>- The meaning of the terms</td>
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<tr>
<td>- Web 1.0, Web 2.0, and Web 3.0</td>
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<tr>
<td>- User-generated content (UGC)</td>
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<td>- Social media, with examples</td>
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<td>- Digital engagement</td>
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<tr>
<td>- Key characteristics of the shift from Web 1.0 to Web 2.0, and the importance of this shift to online interactions</td>
</tr>
<tr>
<td>- The importance of social media to the nonprofit sector</td>
</tr>
</tbody>
</table>

The Lesson

Social media is becoming an important part of everyone’s agendas – from maintaining your personal online presence to uses in marketing, business, and notably, the nonprofit sector. However, as Kaplan and Haenlein¹ note, “there seems to be confusion among managers and academic researchers alike as to what exactly should be included under this term.” In order to understand how your nonprofit can best utilize social media to build a strong online presence, you must first understand what exactly social media is. To do this, you must learn the meaning of the term social media, as well as series of other related terms that are being
used in conversation about it. Although it is not likely your organization will encounter these terms in daily social media practice, it is important to understand them in order to maximize social media success. This understanding may be particularly useful when reading other resources about social media.

Kaplan and Haenlein\(^1\) provide a useful description of social media that defines it in relation to another term, Web 2.0. Since the term Web 2.0 is often used in conjunction with Web 1.0 and, recently, Web 3.0, we will begin by defining these three terms and then continuing on to define social media itself.

**Web 1.0**, or the “static web”, includes platforms on which information is created and published by an individual and broadcasted to many people.\(^1,2\) Examples of Web 1.0 platforms are websites and e-newsletters.

**Web 2.0**, or the “social web”\(^2\) is a term that emerged in 2004.\(^1\) Having evolved from Web 1.0, it is used to describe platforms in which content and applications are created collaboratively and modified by all users in an ongoing manner.\(^1\) Examples of Web 2.0 include social networking sites and blogging platforms.\(^2\) Kaplan and Haenlein\(^1\) describe Web 2.0 as the platform for the evolution of social media.

**Web 3.0**, or the “mobile web”, combines tools from Web 1.0 and Web 2.0, but adds the ability to communicate anytime and anywhere. Example of technologies include group text messaging, mobile websites, as well as smartphone and tablet applications (“apps”).\(^2\)

Although all three of these platforms are still in use, there has been a shift in focus from Web 1.0 to Web 2.0, and more recently, towards Web 3.0. The emergence of Web 2.0 technologies marked an important shift in the way we communicate online. According to Berthon et al.,\(^3\) there has been a “shift in focus from companies to consumers, individuals to communities, nodes to networks, publishing to participation, and intrusion to invitation.”

Before defining social media, there is one last definition to consider. When you read about social media and Web 2.0, often the term “user-generated content” (UGC) is used. UGC is a driving force behind social media platforms and, more generally, Web 2.0.

**User generated content (UGC):** The Organisation for Economic Cooperation and Development [cited by 1] claims that there are three basic requirements for material to be considered UGC. The material must:

1. Be published on a publicly accessible website or a social networking site that is available to a select group of people (excluding email or instant messaging content);
2. Show creative effort (excluding reposts of previously created material); and
3. Be created outside of professional practices (excluding content for commercial marketing).

UGC contributes to the shifts associated with moving from Web 1.0 to Web 2.0. For example, the presence of UGC has facilitated a shift in the locus of power from the firm to the consumer.\(^3\) In the past, firms had control over what information consumers could access,
but now, the power largely lies in the hands of consumers. Now, if a consumer searches for a product online, the results are likely to be dominated by UGC in the form of opinions about that product. The presence of UGC online shapes the opinions of all users from large, diverse populations, and influences consumers’ opinions in the offline world (such as when they make a decision about what product to buy in store).

Now that we have taken the time to understand some key terms used to describe the online world, we can narrow in on social media itself.

Kaplan and Haenlein provide a useful definition of social media as it relates to Web 2.0:

**Social Media:** “...a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of User Generated Content.”

Social media content is made up of text, pictures, videos, and networks. Importantly, social media involves a high degree of online interaction, creating environments in which “individuals and communities share, co-create, discuss, and modify user-generated content.” Social media platforms include microblogs (i.e. Twitter), social networking sites (i.e. Facebook), wikis (i.e. Wikipedia), video or photo-sharing sites (i.e. YouTube and Flickr, respectively), recommendation sites (i.e. Yelp), and location-sharing services (i.e. Foursquare).

The ability of social media to promote ongoing communication, collaborative environments, and a shift in focus from the firm to the consumer gives it great potential that is being harnessed by diverse fields. According to Bowen, social media platforms should be used for digital engagement, in which organizations create active and interested relationships with the public. Ricadela [cited in 8] noted a comment from Reid Hoffman, the co-founder and chairman of LinkedIn, recalling his belief that “the ability to leverage relationships embodied in social networks will become one of the most transformative uses of the Internet.”

The power of social media is well recognized in the nonprofit sector. A recent statistic states that 98% of nonprofits are on Facebook, and the value of a Facebook "like" for a nonprofit over 12 months is estimated to be $161.30. The average donation made over social media has risen from $38 to $59 between 2010 and 2012, just two years. These figures are just some of many that illustrate the prominence of social media in the nonprofit sector, and the necessity for non-profits that have not harnessed its power to penetrate this set of online tools immediately.

### Steps to Take

1. Work to ensure you understand the definition and importance of the terms: Web 1.0, Web 2.0, Web 3.0, UGC, social media, and digital engagement. This will help you and any social media contributors at your organization to understand the basics of social media. It will also facilitate an understanding of any further reading on social media, especially from academic or technologically focused sources.
2. Begin to recognize the power of social media in the nonprofit sector, the necessity of ensuring your nonprofit harnesses this power through execution of its own social media strategy. Refer to further modules for an understanding of how to design effective social media best practices that are catered to your organization.

Resources

Heather Mansfield’s 2012 book, “Social Media for Social Good: A How-To Guide for Nonprofits” offers extensive advice for nonprofits desiring to use social media effectively. The guide is written in easy to understand terms and could be highly useful to any nonprofit seeking to develop its own social media strategy.

Mashable, a social media and technology resource online, offers a full beginner’s guide to social media at http://mashable.com/2012/06/12/social-media-beginners-guide/.

Stanford Social Innovation Review has an archive of social media articles and blog posts, which can be accessed at http://www.ssireview.org/.

References


Module 2: The Value of Social Media

Learning Objectives

At the end of this module, readers should understand:

- The value of social media to:
  - Organizations in general
  - Non-profit organizations
  - Scientists
- The importance of learning from social media experiences in fields outside of your own

The Lesson

Many individuals may not understand the value of social media, both to their own personal and professional development, and to the success of the organization they work with. This module will provide an overview of the value of social media, generally, to nonprofits, and to the scientific community.

The Value of Social Media

Social media is valuable to a variety individuals and organizations for many reasons. According to Kaplan and Haenlein,1 “Social Media represent[s] a revolutionary new trend that should be of interest to companies operating in online space—or any space, for that matter.” By looking on social media sites the importance is clear across many fields: for example, the President of the United States, Barack Obama, has an active Twitter account with 40.3 million followers. Kietzmann2 notes two other events from distinct fields that create a picture of just how present and important social media is: The New York Times hired its first social media editor over 4 years ago, and the Catholic Press Association provides educational materials on how the church can use social media.

Social media has been studied extensively in business and marketing for many years. More recently, a body of literature on social media for nonprofits has emerged, however, much can still be learned from the past experiences of others. Kaplan and Haenlein2 provide insight into social media’s value to organizations of all kinds:
“Social Media allow firms to engage in timely and direct end-consumer contact at relatively low cost and higher levels of efficiency than can be achieved with more traditional communication tools. This makes Social Media not only relevant for large multinational firms, but also for small and medium sized companies, and even nonprofit and governmental agencies. Using Social Media is not an easy task and may require new ways of thinking, but the potential gains are far from being negligible.”

Value of Social Media to Nonprofits

There is increasing recognition of the value of social media to nonprofits. Social media allows non-profits to build awareness of their mission, grow their influence, and empower their supporters to spread their message. One way to understand the value of social media to nonprofits is through the lens of building a “networked nonprofit”. Searce et al. explains this term by saying that organizations are intentionally filling the role of “network weaver”. A weaving network involves connecting both likeminded and diverse individuals and encouraging them to build relationships by working together on small projects. Here, we will briefly describe what it means to be a networked nonprofit, and follow with an explanation of the value of social media to these organizations.

The networked nonprofit. Although it has been suggested that the largest organizations are most successful, strengthening your network as a small organization can have huge benefits. Being a networked nonprofit involves emphasizing connectivity and social capital over hierarchy. A networked nonprofit must think of itself as part of a larger network, rather than at the centre of its own. It must focus less on the growth of the organization itself, and more on establishing a strong network with like-minded, long-term partners. It is important to focus on the long-term as a networked nonprofit, even if this occurs at the cost of certain short-term successes. A networked nonprofit must also focus on its mission rather than its own growth and development, and on trust rather than control. A critical behaviour of a networked nonprofit is to mobilize resources outside of its own control. This allows nonprofits to achieve missions more efficiently, effectively, and more sustainably than if they were working alone. It also allows them to focus on developing their own expertise, since its partners can provide other expert resources. According to Wei-Skillern and Marciano, nonprofits that pursue their missions through networks of long-term, trust-based partnerships consistently achieve more sustainable mission impact with fewer resources than do monolithic organizations that try to do everything by themselves.

Social media for networked nonprofits. Social media can, by nature, help nonprofits meet their networking objectives. The large and diverse networks that exist on social media and the potential to build new networks using social media are critical access points for nonprofits to engage with their networks. Social media increases nonprofits’ ability to communicate with various stakeholders, including: clients, regulators, volunteers, traditional media, and the general public. By networking with these stakeholders on social media, nonprofits can help to: weave community, access diverse perspectives from large populations, build and share knowledge, mobilize people, coordinate resources, and produce action. For example, knowledge can be built and shared through discussion in online spaces, and diverse perspectives can be accessed by crowdsourcing for expertise.
To complete this section, we refer to a table from Convio\(^3\), listing ten benefits of social media for nonprofits.

Table 1. Ten Key Benefits of Social Media for Nonprofits\(^3\)

| Ten Key Benefits of Social Media for Nonprofits
<table>
<thead>
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<tbody>
<tr>
<td>1. Learn what your supporters are saying and sharing about your organization.</td>
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<tr>
<td>2. Drive traffic to your various web properties—website, blog, Facebook, etc.</td>
</tr>
<tr>
<td>3. Improve results on search engine result pages with keyword rich content.</td>
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<tr>
<td>4. Drive visitors to online donation pages.</td>
</tr>
<tr>
<td>5. Enable supporters to distribute messages about your organization through their social web presence.</td>
</tr>
<tr>
<td>6. Empower your most passionate and influential supporters to promote your organization.</td>
</tr>
<tr>
<td>7. Enable grassroots movements in real-time and rapidly respond to unforeseen events.</td>
</tr>
<tr>
<td>8. Humanize your organization by not limiting communications to traditional methods or messages.</td>
</tr>
<tr>
<td>9. Acquire new contacts and build your email housefile.</td>
</tr>
<tr>
<td>10. Increase trust and loyalty from your supporters by allowing them to share their voice through feedback forums.</td>
</tr>
</tbody>
</table>

**Value of Social Media to Scientists**

Beyond the nonprofit sector, it is important for organizations to understand the diverse values and potential uses for social media. Certain organizations will benefit from learning about social media use in fields that relate to their work. For example, a nonprofit organization like the CCGHR, whose mission includes building and strengthening the global health research network in Canada, can benefit from understanding the value and uses of social media to scientists and to academics. This section will explore the benefits of social media to scientists, but all nonprofits are encouraged to explore social media values in the fields that are most relevant to their work. Learning from experiences in other fields, even unrelated, can also be helpful to understanding the landscape of social media.

There are many reasons why scientists should be encouraged to tap into social media channels. Social media allows scientists to build professional profiles, communicate with one another, and be a voice to the public for science.\(^7\) Darling\(^8\) states, "Social media can be a powerful tool to speed up how scientists create, publish and communicate their research."
To aid professional development, scientists can build profiles online that feature their appointments, credentials, publications, and research interests. Over sites like Twitter, researchers can connect with other like-minded professionals. The potential to network professionally over sites like Twitter and LinkedIn is significant, and online introductions can facilitate real-world interactions at future conferences and workshops. Researchers and other employers are also likely to post professional opportunities via social media channels like LinkedIn.7

Scientists can also use social media to impact different communities. The scientific community can be strengthened online by sharing publications, making researchers aware of work they may have otherwise not discovered. Also, scientists can promote their thoughts and opinions through personal posts and contributions to online discussions. Online discussions between researchers can facilitate “fast-paced discussions of topics that scientists ‘want and need to discuss’ (e.g., topics where peer review is not suitable or necessary)”.7 Scientists can circulate information about upcoming events, and also tweet from conferences to keep other scientists informed about happenings as they occur.7

By posting their work on social networks, scientists also have the opportunity to engage with the general public about academic findings. The ability for scientists and the public to communicate directly over social networks is exciting because of its potential in stimulating meaningful discussion and deliberation about current research (Darling, 2013). Not only can online scientific communities promote important causes to the public, but also connect with policymakers. This has previously been seen in the economic community, “where blog posts and online discussions led to groundbreaking policy decisions at the US Federal Reserve.”7

To illustrate the potential for scientists to engage with many audiences over social media, we can look to a study conducted by Darling. In a survey of 116 marine scientists who actively tweet, it was found that 55% of followers were scientists and 45% were media, NGOs and the public. Darling also noted the potential for policymakers to read scientists’ tweets, and that funding boards are beginning to turn to social media impact when considering the impact of a research project.8

**Steps to Take**

1. Ensure you understand the value of social media to your nonprofit, and that all staff and volunteers at the nonprofit also have some understanding of this value.

2. Explore the value of social media to other fields, including fields related to your nonprofit’s work and less related fields that offer valuable lessons in using social media effectively.

**Resources**

**For Nonprofits**
Social Media Best Practices for Nonprofit Organizations
Canadian Coalition for Global Health Research


Beth Kanter provides various resources on how nonprofit organizations can become “networked nonprofits”. She wrote an article called “Becoming a Networked Nonprofit” for the Stanford Social Innovation Review, which can be accessed at http://www.ssireview.org/blog/entry/becoming_a_networked_nonprofit. She also co-authored a book called “The Networked Nonprofit”, and authored a second book called “Measuring the Networked Nonprofit.”

For scientists

- ScienceOnline: a diverse group that comes together to conduct, share, and communicate about science online. http://scienceonline.com
- COMPASS: an organization working to connect scientists and their work with society; offers social media training workshops for scientists. http://compassonline.org/
- Escape from the Ivory Tower: a guide teaching scientists how to communicate effectively with the public through various media.
- Superfund Program at Oregon State University: offers a list of resources for science and social media. http://superfund.oregonstate.edu/

References


Module 3: Understanding Social Media

Learning Objectives

At the end of this module, readers should understand:

- How social media has changed the landscape for communication, through information exchange, formation of networks, and a shift in focus and control from the organization to the user
- Two behaviours that organizations can adopt to accommodate for these changes: listening and losing control of the message
- An example of a holistic model for engagement that is responsive to the current landscape of social media, called “working wikily” or being a “networked nonprofit”

The Lesson

In order to use social media effectively, it is important that nonprofit organizations understand exactly what social media is, and what the value is to the organization (see Module 1: What is social media? and Module 2: The value of social media). However, many organizations that understand these basics are still reluctant or unable to use social media effectively [cited by 1]. Lovejoy and Saxton explain, “Prior studies (e.g., Kent, Taylor, & White, 2003; Saxton, Guo, & Brown, 2007) have shown that nonprofit organizations have not been able to use websites as strategic, interactive stakeholder engagement tools.” Organizations seem to have a persistent misunderstanding of exactly what it means to engage effectively over social media [cited by 1]. This module hopes to address continued misunderstandings about social media by exploring the topic more deeply.

Using social media can be challenging for organizations because it requires them to learn about a new set of engagement platforms that differ greatly from traditional media. Engaging on these platforms successfully not only requires new communication strategies,
but ultimately, that organizations redesign how they operate. Organizations should be encouraged to get comfortable and communicate openly over social media, yet this can be a daunting task. Understanding the social media landscape can help organizations push themselves to design strong social media strategies and engage confidently online.

The Changing Landscape

The movement from Web 1.0 to Web 2.0 saw the introduction of social media into the digital landscape, and with this many changes to the way we communicate online (for definitions of Web 1.0 and Web 2.0 and a brief introduction to these changes, see Module 1: What is social media?). To make these complex changes easier to understand, we will focus on a few major areas: information exchange, networks, and shifting control. This will be followed by two tips for using social media in a way that is responsive to these changes. It is important to remember that the impact of social media on how we engage will continue to evolve, and thus organizations need to be willing to adapt continuously in order to find success in their online interactions.

Information exchange. Social media changes the nature of how we can exchange information in many ways. Bowen states, “Social media has transformed the way in which reporters gather and report information, the way public relations practitioners provide news, the way audiences collect information, and the nature of the interaction between publics and...organizations.” Social media tools allow vast populations to connect in common digital spaces, irrespective of their locations across the globe. This facilitates access to a greater diversity of perspectives than was previously available. Social media platforms also make it possible to connect and share information in many different forms and quicker than ever before.

Networks. The ability to exchange information quickly within large and diverse populations has created a “24/7 collaborative world”. Social media allows individuals, including nonprofit supporters, to connect, share and collaborate in new ways, forming unique and diverse networks in the online world. It allows people to see and utilize existing networks more easily, and forge connections with new ones. An interesting result of these networks is the “multiplier effect”, where sharing information with users in your network can prompt them to share this same information with new users in their own distinct networks. It is important to note that despite common beliefs, all age groups are engaging on social media. Although they may engage on different platforms and in different ways, it is possible to connect with networks of various age demographics online. The following infographic breaks down social media use by generation.
Shift in focus and control. The formation of new online networks via social media creates a level-playing field on the internet. As a result, there has been a shift in focus and control from the firm to the consumer (or from the nonprofit organization to the supporter). Speaking from a business perspective, professionals previously controlled mass communications through strategic press releases and strong public relations managers. Consumers did not have the ability to comment or provide feedback. Now, one could say that corporate communication has been democratized; social media users control the conversation about brands. While typically, nonprofits are guided to build a brand and attract funding by taking credit for their work, now they must address the shift in power associated with social media.

Solutions

Overall, social media has changed the way nonprofits are able to promote social change. The environment in which nonprofits work is more complex, online networks play a central role, and stakeholders want more involvement in organization activities. Given this landscape, there are two key behaviours that organizations should be encouraged to adopt on social media: listening and losing control. These behaviours will be explained below, followed by an example of a holistic social media strategy that incorporates them successfully.

Listen. Since social media gives every user the power to comment, review and publish, organizations need to talk less and rely on listening to build their brand. By listening effectively, organizations can make appropriate decisions about how to engage and then respond, which will increase the satisfaction of their followers and supporters. An example of successful listening can be seen in the MyStarbucksIdea campaign, in which the coffee
chain Starbucks asked consumers to contribute their own ideas for the company over social media channels. Starbucks was able to increase its recognition as a brand that listens and collaborates by deliberately using social media for the functions this tool so naturally provides.5,6

**Lose control.** Given that users control the conversation on social media, organizations must take advantage of their loss in control8,10 by working to maximize collaboration on ideas, knowledge, content, designs, and products.13 This involves creating a sense of co-ownership over an organizations’ decisions, which can be facilitated by listening (see above), openness, and genuineness.10,13 Although it may be difficult for organizations to let go of their power, this release can increase authenticity and transparency that will enhance the strength of the organization’s brand, and its resulting level of public support.14

**Model for Engagement**

To create a more complete picture, we will explain a mindset that nonprofits are being encouraged to adopt on social media, termed "working wikily"8 and acting as a "networked nonprofit"3 in two different settings. This approach involves actively participating in your networks, increasing openness and transparency in your communication, decentralizing decision making, and promoting collective action. For an organization to find success with this method, they need an awareness of the networks they are embedded in. They must find conversations on these networks, listen to these conversations, and take part in them (rather than broadcasting information). Actions that encourage your network to share your content with their own networks can expand the size of your audience greatly, attracting new supporters. Overall, organizations must work to cultivate their networks to find success on social media.3,8

**Steps to Take**

1. Work to understand the characteristics of the social media landscape highlighted in this module (information exchange, networks, and the shift in focus and control). Understanding these factors in addition to social media basics will help create a stronger and more successful social media presence for your organization. Remember that your organization must be willing to continuously learn and adapt their digital practices for engaging communities, since the current landscape is likely to change in the future.

2. Ensure your social media activity takes the social media landscape into account. Focus on listening and losing control as main features of your social media strategy, and consider mindsets such as "working wikily" and the "networked nonprofit" to help you meet these objectives. See Module 4: Designing a social media strategy, as well as the remainder of modules in this series, for more ideas.

**Resources**

Kietzmann1 presents a structure for understanding SM based on seven functional building blocks. These blocks can be used to break down social media and therefore allow firms to make decisions on how to use it that are informed and effective.
Convio® discusses how to listen in more detail, including basic and advanced listening tips, and noteworthy listening tools. Their report can be accessed at http://www.councilofnonprofits.org/files/Convio_Social-Media-Guide.pdf.

References


Module 4: Designing a Social Media Strategy

Learning Objectives

At the end of this module, readers should understand:

- An organization's **social media strategy should consider numerous factors**
- A **social media strategy should include various preliminary considerations**, such as integration with Web 1.0
- Research shows **social media strategies can be broken down into four distinct categories**, classified by an organization's comfort with uncertainty and the level of results achieved through social media
- Organizations can change their **social media strategies over time** to produce greater successes

The Lesson

Designing a unique social media strategy for your organization will be a challenging task. By taking a variety of factors into consideration, it will be possible to develop a comprehensive social media strategy that reflects the needs, goals, and capabilities of your organization. This module will provide a few preliminary tips for designing an effective social media strategy, followed by an explanation of four different approaches that companies can take to engage over social media. These may be useful to help you understand which category your nonprofit currently fits in, and how it can graduate to a more successful social media strategy.
Integrating with Web 1.0. To begin, first consider how your social media strategy will be integrated with your Web 1.0, or static web, presence (see Module 1: What is social media? for a definition of Web 1.0 and the static web). Static online tools remain the most powerful for nonprofit organizations, and they should spend a minimum of $2500 a year on Web 1.0. To integrate your social media presence with existing online tools, make sure you include social media icons (with links) on all communications, such as on your organization’s website and any e-newsletters.

Beginning engagement. It is important for your organization to begin using social media as soon as possible, given its immense role in modern networking. However, before you begin there are certain organizational tasks to complete. By designing a social media strategy, you will be able to avoid serious mistakes and maximize the chances of finding success on social media. It is suggested that you will need 12 to 24 months to get your social media plans into full swing. The factors your organization should consider in designing its social media strategy are covered throughout this series of modules. These topics include: setting goals, establishing a voice, choosing your social media tools, management, and monitoring & evaluation.

Characterizing social media strategies

Harvard University conducted a useful research study that analyzed the social media practices of over 1100 companies, ranging across various industries and located in numerous continents. The project also involved conducting interviews with 70 executives that managed the social media initiatives of their respective organizations. Based on the information gathered, the researchers were able to classify companies’ social media strategies into four distinct categories. These categories consider the level of uncertainty a company finds acceptable in is online activity, and the level of results it seeks in that activity. The strategies are temporal, where the first two yield relatively quick results and companies can move to the third and fourth through learning and preparation.

Understanding where your organization fits in this progression may help it define its social media strategy more clearly and set goals for future improvements to this strategy, moving from an earlier stage to a more advanced and successful one.

1) The “predictive practitioner.” This strategy involves only one specific department of an organization engaging in social media, such as customer service. Social media actions are certain and lead to results that can be measured easily with established tools.

2) The “creative experimenter.” This strategy involves greater uncertainty than the “predictive practitioner”, where the organization uses small-scale tests and an adaptive nature to improve its social media practices incrementally. Listening to customer opinions and responses facilitates this learning. The strategy is often employed by organizations with small budgets and few constraints on the return on investment (ROI) they must show to management.

3) “The “social media champion.” This strategy is more advanced than the first two, and is often utilized by organizations that are running large initiatives and who want to
produce predictable results. At this level, various departments in the organization may collaborate on producing strong social media content, and collaborations may extend to include external parties. Employing this strategy can help companies find new supporters, both internally and externally.²

4) “The “social media transformer.”” Last, and strongest of the four strategies, the “social media transformer” involves large-scale interactions that include external stakeholders. Here, the entire organization needs to restructure its processes, management and leadership styles. Social media strategies should be adapted based on learning.²

In addition to considering the above strategies, make sure you follow other organization’s social media presences, looking to stories of success as well as failure. See the Resources section for recommended case studies in social media for nonprofits.

**Steps to Take**

1. Consider how your organization’s decisions about factors in social media use (see various modules in this series) come together to form a cohesive social media strategy. Work to bring these decisions together into a formal document that can be used to inform your employees or volunteers, and that can be referenced when future changes are made to social media policy and activity.

2. To further classify your social media strategy, take the quiz provided by Harvard’s study on social media strategies (see Resources section of this module). Use this classification to help you understand your organization’s social media decisions and actions.

3. Think about how you can improve your social media strategy over time. For example, consider how you might move into the subsequent category of the model of social media strategies, leading to greater social media successes.

**Resources**

The study outlined in this module offers a quiz for companies to determine what their social media strategy is. The quiz is available at [https://www.bc.edu/content/dam/files/centers/cwf/rt/pdf/SocialMediaHBRJuly2011.pdf](https://www.bc.edu/content/dam/files/centers/cwf/rt/pdf/SocialMediaHBRJuly2011.pdf).

Mashable provides tips on how to stay on topic of social media news in its article "6 Ways to Stay on Top of Social Media". The article can be accessed at [http://mashable.com/2012/07/07/social-media-education/](http://mashable.com/2012/07/07/social-media-education/).

Convio’s free report “Going Social: Tapping into Social Media for Nonprofit Success” offers case studies on nonprofits that have utilized successful social media strategies. This report also outlines various resources for how nonprofits can design effective social media strategies, including:

- Convio’s blog: [www.connectioncafe.com](http://www.connectioncafe.com)
- Mashable: [www.mashable.com](http://www.mashable.com)
Social Media Best Practices for Nonprofit Organizations
Canadian Coalition for Global Health Research

- The Nonprofit Technology Enterprise Network's blog: www.nten.org/blog


References


4.0 Designing a Social Media Strategy

Module 5: Setting Goals

Learning Objectives

At the end of this module, readers should understand:

- Why setting goals is important to social media activities
- How to approach goal-setting for organization projects
- Why understanding your network will help your organization reach its goals
- How to meet objectives while letting the user maintain control

The Lesson

Before beginning to use social media, an organization first needs to set clear goals that outline what it wants to achieve by using it. These goals should be aligned with the overall mission of the organization, but also made specific to social media communication.¹ Next, it can select the social media tools that will best facilitate meeting those objectives. It is important to set goals prior to choosing online tools, because these tools show the best results when they are used for an identified purpose and customized to fit that purpose.²,³

As Bik² notes, “To save time and target the most efficient resources, it is important to think about the timeline of your goals and the time commitment you are willing or able to make. In addition, each social media portal offers unique features, which can complement each other when content is shared between sites.” Try to reach your goals in small steps, starting
with one to three objectives, in order to keep your social media plan realistic. Also work to focus all of your social media decisions and activities around your goals; consider what you are trying to achieve with each individual action, and whether that action contributes to meeting your organization’s social media objectives.

When designing individual projects, focusing on the goals of the project and how social media tools can help meet them will increase the likelihood of the project being successful online. If you’re concerned about your ability to use social media tools effectively, commit to learning the basics through free tutorials and take comfort in the fact that, with experience, your success with online tools will improve. Social media users are forgiving – as long as you do some homework, it is okay to rely on trial and error and make a few mistakes. (See Resources section to learn about some of these free tutorials.)

In line with becoming a networked nonprofit, understanding your organization's position within networks and understanding the dynamics within those networks, allows opportunities for impact to be identified. Nonprofits can then use this understanding to make informed decisions about which social media tools to adopt, and how to use them in order to effectively meet their goals.

Since losing control is a feature of social media that organizations must learn to accept, it is important to consider how an organization can ensure its goals are met. According to Wired’s founding executive editor Kevin Kelly, combining top-down and bottom-up approaches can help an organization tap into the creative generation of ideas by users “while still maintaining oversight, checks, and balances to ensure appropriate direction.” Also, it is important to note that many nonprofits’ goals may be centered around meeting the needs of different populations, and responding to the desires of their supporters. For example, if supporters want to see the organization spend more time focusing on a particular issue, it may be beneficial for the organization to do this. Social media channels that give the user control will make it possible for organizations to listen to the needs and desires of its supporters, and to adapt strategies that will better meet those needs.

**Steps to Take**

1. Consider what your organization hopes to achieve by using social media. Ensure management, or a designated social media team outlines these core objectives and disseminates them to the staff and volunteers that may be contributing to your organization’s social media activity. Be sure that when anyone posts on behalf of your organization, they always refer back to these goals, and consider how the particular contribution helps meet them. Your organization’s goals can be communicated through a detailed social media strategy.

2. If there is a particular project that involves social media activity, set goals that are specific to that project and refer back to them while the project is undertaken.

3. To evaluate how well your organization is meeting its goals, use metrics for monitoring and evaluation (see Module 18: Monitoring and evaluation).
Resources

In Convio’s free report “Going Social: Tapping into Social Media for Nonprofit Success”, three sample objectives for nonprofits using social media are provided. These objectives – building awareness, driving action, and advancing engagement – may be directly adopted by nonprofits looking to define their social media goals clearly. This report can be accessed at http://www.councilofnonprofits.org/files/Convio_Social-Media-Guide.pdf.

References


Module 6: Establishing a Voice

Learning Objectives

At the end of this module, readers should understand:

- The importance of establishing a consistent voice on social media
- That content and interactions on social media contribute to your organization's voice
- General guidelines for establishing your organization's social media voice
The Lesson

When using social media strategically, it is important that an organization has a unified voice to communicate to its networks. Social media research in the field of marketing states that as with any communications strategy, a social media strategy needs to share a clear story with the marketplace, whether it be about a product, service, relationship, or a general theme. This module will explore main characteristics of an organization’s social media voice, followed by guidelines on how to develop a strong voice for your organization.

Characteristics

Consistency with goals. One element of your organization’s voice will be in relation to the content you post online and how it reflects the goals and attitudes of your organization. When establishing your voice, consider how your goals for social media use relate to the overall goals and mission of your organization. It is likely that your online voice will be similar to the voice you have established for other communications strategies, but catered more carefully to the tools available through social media.

Consistency with audience. Establishing a voice will also create consistency for an organization’s audience. By ensuring all individuals who manage social media for your organization honour this voice, it will be possible to avoid a segmented message across content creators. This is important because social media pages that are managed by robots or teams are often distinguishable from individual accounts, and users may see “programmed” behaviour as unauthentic. Consistency is important because it allows meaningful relationships to be built. It helps to build trust, it allows the public to understand your organization, and it helps your organization meet the expectations of the public.

Content and interaction. Your voice will not only be delivered through the type of content you post, but also through how you interact online. Although this will be discussed more thoroughly in Module 14: Interacting online, in simple terms this includes how often you post and how you choose to interact with other users. Some general guidelines that may help you develop a voice in social media are outlined below.

Guidelines

Be active. Ensure you post fresh content consistently and engage in open, active conversation with your networks. Make sure your online presence goes beyond addressing negative attention.

Be interesting. Listen to your audience to see what type of content they want to hear from you. This will make your contributions more interesting to them.

Be humble. Avoid being over-confident about social media skills. Take time to learn about and explore a social media platform, including its history and basic rules, before using it.
This will help your organization convey a stronger voice when you do engage with networks over social media.⁴

**Be comfortable.** Rather than investing large amounts of money into a highly professional social media presence, work to incorporate it smoothly into your networks.⁴

**Be honest.** Using an honest voice is crucial to establishing trust with your audience. Transparency and openness are valuable traits to display, especially since users maintain control on social media. Honesty will help build stronger relationships with your listeners.⁴

**Be respectful.** Although openness and transparency are important traits, they need to be balanced with respect for security and privacy of the organization, and of information you gather from your supporters. Searce states an organization should learn "to determine what is proprietary and worth guarding, and what should be made widely available in service of the larger cause."⁵ (See Module 10: Choosing your tools for more on respecting privacy on social media.)

**Be unique.** A unique voice is more likely to be heard among the many organizations using social media. Although traits like consistency and honesty are more important, if you can engage with your audience in unique ways this may help set you apart from the masses.⁴

**Be positive.** Likeable Media argues that promoting your organization’s likeability is important. This can be done by ensuring your communication has a positive sentiment, and by considering what behaviour your audience would like.⁶

**Steps to Take**

1. Ensure management of your organization (or a designated social media team) works together to outline the qualities that your organization wants to convey through its voice on social media. Consider how this voice reflects the overall mission of the organization, and objectives of other communications strategies.

2. Establish a protocol to ensure that all individuals who post on behalf of your organization are familiar with the voice the organization wants to convey through social media communications. Information on the organization’s voice and how to effectively use it could be integrated into social media guidelines for your organization (see Module 17: Developing social media guidelines).

**Resources**

Refer to the References section of this module for further and more detailed readings on establishing a social media voice for your nonprofit.
Module 7: Donor Engagement

Learning Objectives

At the end of this module, readers should understand:

- Traditional donor engagement models
- The shift to donor engagement models that consider social media communication practices
- The necessity of re-evaluating any donor engagement models to incorporate the potential of social media to engage donors.

The Lesson

This module will explore the donor engagement model as it fits with modern social media practices. Organizations that are tapping into social media should consider re-evaluating any existing donor engagement strategies accordingly.
Traditional model. Dixon\textsuperscript{1} argues that nonprofits need a new donor engagement model that better reflects what modern successful nonprofits look like and incorporates the potential of social media to bring an organization success. Previous models were structured like a ladder or pyramid, where individuals entered the structure from the bottom and through calculated actions on the part of the organization, could be brought to successively higher levels in the model. Tools such as direct mail and phone calls could engage individuals, bringing their status from low engagement positions like supporter, to higher ones like volunteer or donor.\textsuperscript{1}

Transition. However, considering the call for the “networked nonprofit”, and the rise of social media tools like online competitions, video campaigns, and mobile giving, this model no longer fits. A nationwide research project in the United States demonstrated that social media has changed the way donors behave and communicate, and that this calls for a new donor engagement model.

New model. The new model must be fluid and continuous, where individuals’ needs are placed at the centre of engagement, rather than the organization filling this space. In this model, individuals can enter at any level of engagement and move between these levels easily, in any direction. The model also recognizes the influences of peers in the strength of the donor-organization relationship. As such, Katya Andresen, chief strategy officer at Network for Good, states, “Organizations need to recognize that they are not their best messengers anymore…When you rank the potential forces on a donor’s decision to give, family, friends, and peers rank higher than anything.” Last, this new model does not employ one fixed goal, but rather recognizes that there is more than one route to maximizing donor support.\textsuperscript{1} A diagram comparing the traditional donor engagement model with one that considers social media communication is provided below.

Figure 1. Donor engagement models\textsuperscript{1}
Last, we provide two tips on engaging donors effectively over social media.

**Diversity calls to action.** Instead of just asking for donations, focus on asking supporters to share, forward messages, advocate for your organization or cause, and volunteer for your organization. This extends support beyond donations to actions that help build your network, leading to stronger support (financially and otherwise) and a larger number of supporters. Identify supporters with influence and large online social networks, and encourage them to speak as a voice for your organization. To distinguish between different calls to action, think about the level of involvement you are asking for and the level of influence the call requires (i.e. sharing requires low involvement and high influence, whereas volunteering involves high involvement and low influence).¹

**Sustain continuous communication.** By encouraging continuous social media advocacy from your supporters in your external network, and from all staff and volunteers in your internal network, you can maintain continuous communication that will lead to greater impact. However, to ensure your internal communicators contribute to your organization’s social media presence effectively, make sure you set clear social media guidelines (see Module 17: Developing social media guidelines) and train your staff and volunteers appropriately (see Module 16: Social media management).¹

**Steps to Take**

1. Understand the difference between traditional donor engagement models and those that consider modern social media communications.

2. If your nonprofit seeks donations, consider how it can modify its donor engagement model to effectively incorporate the use of social media. Remember that any new strategy should use traditional engagement channels as well as modern ones.

3. Follow the tips provided in this module to effectively engage donors over social media.

**Resources**


**References**

Module 8: Reaching Target Audiences

Learning Objectives

At the end of this module, readers should understand:

- To define its target audience
- To locate this audience on social media platforms
- To build a strong audience through community engagement
- To continuously grow this audience

The Lesson

It is suggested that a critical question for marketers who are acting on social media is to ask, "Who are the targets?" Although the goals of marketers and nonprofit organizations in interacting online are not necessarily aligned, this question is also an important one for nonprofits to ask themselves. A nonprofit's target audience must be well defined and reflect the goals of the organization in terms of who it would like to engage with. Once an organization has defined its target audience for social media, it must find and engage with it online. Since "online communities, conversations, and user demographics...can vary across different tools...using multiple tools may be necessary to achieve one's goals." [cited in 2] Thus, an organization’s choices about which social media tools to use should reflect what its defined target audience is (See Module 9: Social media tools and Module 10: Choosing your tools).

Building a strong audience. Regardless of who an organization's target audience is, or where it engages with them, this audience must be strong. This does not necessarily mean an audience that is large in sheer numbers, but rather one that is valuable in helping an organization meet its objectives. An organization should ensure its interactions are focused on the entire community, not just the individual, and to find success on social media this community must be engaged. (See Module 14: Interacting online)

Growing your audience. There are two ways an organization can grow its community on social media, through paid growth and through organic growth. Paid growth involves using advertisements or sponsored stories to get the attention of new followers, or audience members. Organic growth involves social media users finding your online presence without the assistance of advertisements. Both of these methods are useful, and paid growth has the power to increase the success of natural growth. According to the social media marketing agency Likeable Media, an organization should never stop growing its community. Mansfield says the magic number is 5000 – if your organization can grow its community to
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this size on platforms including Facebook, Twitter and LinkedIn, it will then begin to grow exponentially.

Steps to Take

1. Define your organization's target audience(s), based on its defined goals in using social media (See Module 5: Setting goals).

2. Determine which social media platforms your audience is active on.

3. Engage your communities of interest through activity on the appropriate social media platforms, building an audience for your social media activity.

4. Grow your community through either paid growth or natural growth, preferably a combination of the two that reflects your organization's available resources.

Resources

Convio's free report “Going Social: Tapping into Social Media for Nonprofit Success” provides a set of questions addressing how to reach your target audience effectively, categorized as Engagement, Activities, and Tools questions. This report can be accessed at http://www.councilofnonprofits.org/files/Convio_Social-Media-Guide.pdf.

References


5.0 Selecting Social Media Tools

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Module 9: Social Media Tools

Learning Objectives

At the end of this module, readers should understand:

- A number of types of social media tools available for use
- The main features of these types of social media platforms, including examples
- The pros and cons of some key social media platforms

The Lesson

There are hundreds, maybe even thousands, of social media platforms, yet it can be difficult to distinguish between the variety of applications available. Many social media platforms now link to each other, creating a web of social media content that can be difficult to tease apart and use to your greatest advantage. The best way to tackle these challenges is to first understand the types of social media tools, their features, similarities and differences, and key examples of each. This module will explain different types of social media platforms (admittedly, not all) and provide examples of each. It will also attempt to compare some major social media platforms in terms of their pros and cons. Ideally, the information provided will allow you to begin the process of selecting social media tools for your organization to use (See Module 10: Choosing your tools for more guidance). Some especially popular social media platforms (Facebook, Twitter, and LinkedIn) are explained in detail in subsequent modules (Modules 11, 12 and 13, respectively). These tools are especially important for nonprofits to use, since they allow an organization to tap into large, existing user bases.

Social networking platforms. Social networking platforms are built to help people engage with each other, to connect over common interests and to build and strengthen networks. They often allow various types of content to be posted (text, links, images, video), and allow groups to be formed to help members organize themselves and their communication.

Examples: Facebook, LinkedIn

Blogs. A blog is a website or webpage that an individual or group manages, posting content such as text and photos on a regular basis. Blogs are often personal in nature and sometimes focus on a particular topic. A variety of open-source and paid platforms host bloggers on the Internet. Blogs allow individuals to share detailed information with their audience, and can facilitate in-depth conversations with users. The best blogs engage readers through interesting content and ongoing conversations between authors and
readers, conducted over comments sections on the blog. Examples: Tumblr, Blogger, Wordpress

**Microblogs.** Similar to blogs, microblogging involves an individual or group posting content, often text and photos, to users on a regular basis. Microblogs, however, involve extremely short blog posts that are often accessed over mobile devices (See Module 19: Mobile social media for more information). This type of social media facilitates listening to and sharing ideas quickly and in an ongoing manner. Microblogs enable less deep conversations than blogs, but make up for this by facilitating continuous communication. Microbloggers may post up to multiple times per day, and readers can respond by “liking”, “favouriting”, and reposting content, as well as by responding directly to posts. Examples: Twitter, the most popular microblogging site, allows posts of up to 140 characters. Other social media platforms, such as Facebook and LinkedIn, have microblogging functions embedded as "status updates", which function similarly to tweets (posts on Twitter).

**Wikis.** Wikis are collaborative online workspaces that invite users to co-create and modify content in an ongoing manner. Wikis can be used to create webpages as well as documents that will be used for other purposes. They can be fully accessible to the public, or closed to defined communities such as employees of an organization. Example: Wikipedia (the most popular public wiki).

**Video- and photo-sharing platforms.** These platforms focus specifically around sharing video and/or photo content with other users. Examples: On YouTube, the most popular video-sharing platform, over 100 million videos are streamed per day. Flickr hosts photo sharing. Pinterest is newer photo-sharing site that is also considered a microblogging platform. It is predominantly used by women (82%), and allows users to create "boards" for sharing photo content. Instagram is a photo-sharing platform that incorporates qualities of social networking platforms.

**Location-sharing platforms.** Location-sharing platforms allow users to “check in” to various real-world locations, allowing their online communities to see where they are and what they are doing. Example: Foursquare is a location-sharing platform that incorporates features of social networking.

Discussion forums. Discussion forums are sites set up to facilitate conversations between users on particular topics. Posts are categorized into threads to help organize information according to topic. Threads usually begin when users post a question to the community and other users respond with various answers and discussion on the topic.

**RSS Feeds.** An RSS (Rich Site Summary) feed is a type of URL that allows users to access new blog and website content without browsing the web. Users can subscribe to an RSS feed, and then select websites they would like to receive new content from, often sites that update their content frequently. This content shows up on a news feed on their desktop. RSS feeds can be synced with apps that allow them to view the feed from mobile devices. Examples: Google Reader is an RSS aggregator, and MobileRSS is an app that allows streaming of content to a mobile device.

**Apps.** Apps are software developed for use on mobile devices. They allow users to access social media platforms on their mobile phones and tablets. This facilitates constant access
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to social media platforms, including the ability to provide live updates from specific locations (i.e. conferences or other public events). (See Module 19: Mobile social media for more information.) Examples: A large number of social networking platforms can be accessed on mobile devices using apps, including Tumblr, Facebook and Twitter. Some social media, like Instagram, are designed specifically as mobile apps and can only be accessed in limited formats from a computer.5

**Recommendation platforms.** These sites take advantage of social media by inviting users to provide review and comment on the quality of services like restaurants and hotels. Reviews and comments are aggregated into ratings and users can access the platforms to inform decisions about where to eat, shop, stay, and more. Platforms also exist that aggregate recommendations about interesting content on the Internet. Example: Yelp is a platform for reviewing real-world services, while StumbleUpon is a platform that shows users collections of interesting sites based on previous users’ ratings of those sites.5,6

Now that you understand some key types of social media tools, and examples of each, it is valuable to consider their strengths and weaknesses in comparison to one another. The following table, created by Bik and Goldstein,5 explores the pros and cons of some key social media platforms: blogs, Twitter, Facebook, and Google+. Taking the time to consider the details of this table will help you better understand what each tool is useful for. Thinking beyond the table, to the values and shortfalls of any social media tool your organization is interested in using, will help you make an informed decision about which ones are best suited to you.

Table 1. Comparison of Online Tools5

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<thead>
<tr>
<th>Platform</th>
<th>Pros</th>
<th>Cons</th>
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<tr>
<td>Blogs</td>
<td>Longevity: posts are accessible via search engines</td>
<td>Time investment for preparing thoughtful posts</td>
</tr>
<tr>
<td></td>
<td>Robust platform for building an online reputation</td>
<td>Posts should be disseminated and advertised via other platforms</td>
</tr>
<tr>
<td>Twitter</td>
<td>Low time investment, short posts</td>
<td>Posts are quickly buried under new content</td>
</tr>
<tr>
<td></td>
<td>Ability to rapidly join in on online conversations</td>
<td>Twitter does not make its archive database accessible to search</td>
</tr>
<tr>
<td></td>
<td>The most current source for breaking news and topical conversation</td>
<td>Gaining followers can be a slow and difficult process</td>
</tr>
<tr>
<td>Facebook</td>
<td>Established juggernaut in the social media world</td>
<td>Privacy concerns</td>
</tr>
<tr>
<td></td>
<td>Ability to create “groups” and “pages” for a person or cause</td>
<td>Frequent changes to layout, features, and settings</td>
</tr>
<tr>
<td>Google+</td>
<td>Integration with Google tools</td>
<td>User base not unique compared to other sites</td>
</tr>
<tr>
<td></td>
<td>Easily manage privacy/visibility by grouping contacts into “circles”</td>
<td>Users still unsure how to use it</td>
</tr>
</tbody>
</table>

doi:10.1371/journal.pbio.1001535.t001

**Steps to Take**

1. Before considering specific social media tools your organization may want to use, first work to understand the types of social media that are available. Understand the types of social media outlined in this module and begin to explore examples of each.

2. To further your understanding of social media platforms, try to understand the differences between them and what benefits and weaknesses characterize each. In this way,
your organization can make a more informed decision about what tools are best for it.

3. Although understanding the unique features of different social media platforms is important, this is only the first step in choosing platforms for your organization to engage on. Read Module 10: Choosing your tools to learn about other considerations your organization must make when selecting social media platforms.

Resources

In its free report, Convio provides definitions and examples of social media tools, including a few that are not covered in this tutorial. This report is accessible at http://www.councilofnonprofits.org/files/Convio_Social-Media-Guide.pdf.

References


3. Herman J. HowTo.gov [Internet]. [no location]: Publisher; [no date] [last updated 2013 Apr 22; cited 2013 Dec 12]. Available from: http://www.howto.gov/social-media/social-media-types


Module 10: Choosing Your Tools
Social Media Best Practices for Nonprofit Organizations
Canadian Coalition for Global Health Research

Learning Objectives

At the end of this module, readers should understand:

- The value of choosing an organization’s social media tools carefully
- Six tips to consider when selecting social media platforms
- Five elements of social media that manifest differently on various platforms and should be considered when selecting tools for engagement

The Lesson

As noted in Module 9: Social media tools, there are a large number of social media tools available for use, and these tools can be difficult to choose from. According to Hanna, a lack of understanding of social media platforms’ fundamentals causes organizations to “risk chasing the latest application and treating elements as standalone platforms. Marketers [or organizations] must therefore learn to navigate and integrate these multiple platforms, while understanding differences among consumers [or users] in the various social behavior segments.” Although it is a challenging task, it is necessary that nonprofits make informed decisions about which social media platforms to engage on.

Here are six tips for selecting social media platforms effectively:

1) **Voice and goals.** Platforms should be selected in accordance with an organization’s voice and goals for using social media. Different types of social media platforms offer unique benefits, such as real-time updates over Twitter or engaging in meaningful conversation over Facebook. Additionally, platforms should be selected based on the features your organization requires to communicate effectively with its audience.

2) **Resources.** Make sure your decisions reflect your organization’s available resources – engage on the types and number of platforms that you can manage successfully and maintain activity through consistent high-quality contributions. Mansfield provides estimates of the necessary time commitment per week for nonprofits on each platform, including 15 hours on Facebook, Twitter, and YouTube, 5 hours on LinkedIn, and 10 hours blogging. See the Resources section for further information on the management needs for a variety of social media platforms.

3) **Multiple platforms.** Using a few tools well is more important than establishing a weak social media presence across many platforms. However, an organization should ensure its communication strategy utilizes multiple channels, both through traditional media and social media platforms. Online communities can be moved to different locations as the social media landscape changes, so building communities on multiple platforms will make it easier to adapt as tools become outdated. Make sure to use consistent account names and vanity URLs on each of your social media accounts (i.e., www.facebook.com/organizationname, @organizationname, etc.), to maintain consistency and allow users to find you on different channels with ease. Also, make sure you do not
spam each platform or community with identical messages. Frequently, supporters will follow your social media presence on different platforms, and they will want to see diversity in how you communicate over each one.

4) Target audience. Organizations should ask themselves which social media platforms their target audiences already live on (see Module 8: Reaching target audiences).² Engaging with existing online networks is generally a smart decision, as it allows organizations to benefit from existing popularity and user bases. If your organization wants to create its own social media tool, be mindful that it is not trying to replicate the functions of an existing platform. This is especially important because the more popular an application already is, the more attractive it will be to new users. Engaging on an existing platform is more straightforward and more likely to be successful.⁴

5) Location. Different social media tools are likely to be more popular in different locations, based on the history of social media use in that location and the tendency for populations to remain hooked on specific platforms.⁸

6) Purpose. When selecting and operating on social media platforms, it can be easy to get lost in the technical details. Try to keep in mind that social media is not about tools, but rather the experiences these tools facilitate and the relationships they help build.²⁹ Understanding this will make it easier to adapt as the function and popularity of different social media channels evolves. Reflect on these goals, and the goals of your organization, whenever possible.

Next, Kietzmann et al.³ identify five important elements of social media that are manifested differently on different social media platforms. Consider what your organization’s goals are regarding each of these elements. This will help inform your decision about which social media platform(s) to engage on.

Identity. Different social media platforms reveal user identity to varying degrees. This includes an individual’s name, age, gender, profession and location. Social media sites have different aims regarding identity and privacy. For example, whereas Facebook requires users to build a personal profile to interact, online discussion forums often allow users to contribute anonymously. According to Kietzmann,³ “Striking a careful balance between sharing identities and protecting privacy is crucial in selecting social media tools; the wrong mix can lead to a lack of accountability among users, encourage cyber-bullying, and pave the way for off-topic and off-color comments.” Organizations should consider what role they want identity to play in their online interactions, and select social media tools accordingly. They should also understand that users often assume privacy online,¹⁰ and make ethical decisions when using user information for data mining and surveillance purposes.³

Sharing. Sharing online encompasses the “...extent to which users exchange, distribute, and receive content”.³ Different social media platforms involve sharing information in different formats, such as text, pictures and videos. Additionally, information of different natures can be shared, such as personal experiences, personal opinions, and professional details. Organizations should consider what types of online sharing contribute to valuable conversations and relationship building within and between members of their online networks. Social media platforms should be selected with consideration of what type of sharing they facilitate.³
Presence. Two elements of presence are important to the way a social media site functions: physical location and online availability. Physical location, referred to as “checking in” (registering your real-world location on a social media platform), communicates a user’s current activity and accessibility in the offline world. This feature is characteristic of mobile social media applications (see Module 19: Mobile social media for more information). Online availability, often referred to as a user’s “status” (online, offline, busy, etc.) allows other users to identify whether or not they are available for instant online communications, or not. A user’s presence is important for facilitating connections, either in the real world by promoting meet-ups, or in the virtual world by promoting synchronous digital communications. Organizations should consider these factors in selecting social media sites.

Relationships. Social media platforms allow users to relate to different extents. Relating in this sense refers to the ability of two or more users to “converse, share objects of sociality, meet up, or simply just list each other as a friend or fan.” Some platforms facilitate formal, regulated interactions, while others allow an unregulated flow of information between users. Typically, online communities that value meaningful relationships also value identity. Organizations must understand how to build and maintain relationships, and whether these relationships should be formal and regulated, or informal and without structure. Developing meaningful relationships typically requires detailed identifiers to be revealed, whereas maintaining existing relationships requires simpler details. Remember that respect for identity and privacy must be maintained when in the process of building relationships. For example, when collecting information about a new supporter, that supporter is revealing personal identifiers in confidence that your organization will handle the information with respect for their privacy.

Groups. Social media platforms facilitate formation of communities and sub-communities in different ways. Some social media platforms inherently have groups, some allow users to create groups, and others allow users to privately sort their contacts into groups only they can see. Groups are important in connecting users based on common factors (i.e. interest, location). They can be communities that exist only online, or they can be reflective of communities that exist in the online world. Additionally, groups can be open (any user can choose to join), closed (requests to join must be approved by a manager), or secret (users can join by invitation only). The presence and nature of groups on different social media platforms should be considered by organizations when making decisions about where to engage online.

Steps to Take

Choose social media tools for your organization carefully, considering the steps and elements outlined in this module.

Resources

Heather Mansfield’s 2012 book, “Social Media for Social Good: A How-To Guide for Nonprofits” offers a section specifically focused on helping nonprofits decide which social media platforms to engage on. Mansfield goes through a variety of options in detail,
including guidelines for how much time each require.

References


Module 11: Facebook
Learning Objectives

At the end of this module, readers should understand:

- The **basic attributes of Facebook**
- A variety of tips on **how nonprofits can use Facebook successfully**

The Lesson

This module will explore the popular social media site, Facebook, first exploring its basic attributes and then providing tips on how nonprofits can use the site successfully.

Description

**Background.** Facebook has over 845 million active users worldwide and is considered the most-used social networking site in 126 countries, including United States, Australia, Japan, the U.K., Canada, Brazil and India. Facebook is seen by some as a personal networking site; only for interacting with family and friends. However, it is widely used by companies and other organizations for professional purposes. In fact, Facebook is even becoming an important news source, with 47% of Facebook users accessing news on the site, and 65% of Americans who access news on social media doing so only on Facebook. All nonprofits should consider using Facebook, due to the immense user base and variety of networks they can tap into on the site.

**Basics.** Facebook is a social networking site; it promotes connections among users through personal profiles, the ability to form online friendships and groups, and communicate through public posts and private instant messages. It is possible to post different types of information over Facebook, including text, photos, video, and audio. Also, the popularity of Facebook means it has been integrated well with many other social media platforms. Users can link their Twitter and Instagram accounts to Facebook, such that content they post is automatically posted on Facebook as well (however this is not a recommended practice for nonprofits).

Tips for Using Facebook

**Use Facebook naturally.** All social media platforms have their own strengths and should be used in a way that draws on these strengths. As sites like Twitter have become more popular, Facebook users sometimes feel the need to post briefly, efficiently, and frequently. However, drawing on the characteristics of other sites will only decrease your success on Facebook. Instead, remember to focus on showing your organization’s voice and personality through stimulating discussion, commenting, and posting a variety of media such as images and videos. For example, Mansfield recommends posting no more than one or two status
updates per day, a much different approach than one would see on Twitter. Importantly, do not automate your content or sync your post with other platforms – users want to hear your true Facebook voice, not an impersonal voice used across the entire web.8

**Find your voice.** If your organization uses Facebook naturally, it will have a Facebook voice that is distinct from its voice on other social media platforms. Although overall, this voice should reflect the social media goals of your organization, certain elements will be unique to Facebook. Try to gain an understanding of how your Facebook community sees you by looking at what types of your content they like, comment on, and share.8

**Be funny.** Organizations may shy away from posting funny content because it seems unprofessional and, simply put, being funny isn’t always easy. However, it is worth noting that social media that goes viral is almost always funny.9 Nonprofits have the tendency to convey “overly earnest, alarmist, or guilt-inducing” voices9, so being funny should be seen as a strong attribute of an organization’s social media presence.6,7 An example of an organization that saw success in using humour online is the U.S. Centers for Disease Control. According to Chang,9 this organization “achieved widespread attention for disaster preparedness by posting a blog that illustrated key preparedness principles for two emergencies: earthquakes ... and the impending Zombie Apocalypse.”

**Target your posts.** Instead of always posting to your entire Facebook network, consider targeting your posts to particular groups. Facebook allows you to segment your fans according to various demographics. These include age, gender, interested in, relationship status, all educational information, workplace, language, country, state or province and city. Posting tailored messages to targeted groups means you will not reach as many people, but it also means a higher proportion of those people will engage. This will increase your Facebook statistics, leading your posts to be included in more followers’ News Feeds. Also, higher engagement means an increased likelihood that users will share your material with their networks, ultimately reaching a much larger audience. Consider posting multiple targeted messages at the same time, so that different demographics you engage with received tailoring information on a common topic.6

**Encourage staff to be active.** Encouraging staff and volunteers to be active on your Facebook page will help keep the engagement level up. However, remember that these individuals should be transparent about their role in your organization, so as to avoid any confusion or lack of trust by the public (See Module 17: Developing social media guidelines for more on this).8

**Post photos.** In order to take full advantage of this social media platform, it is important to focus on visual content.6,7 Photos get up to twenty times more engagement than links, status updates, and video posts.5 Facebook sees attention gained through photo posts (via likes, clicks, comments, shares, etc.) as a reflection of your popularity on the site, leading your information to be posted on other users’ News Feeds more frequently.6 This will increase the number of people viewing your posts and therefore act as an opportunity to expand the size of your network. Some tips for posting photos: In addition to posting photos individually, you can increase your photo content by adding images to text posts.7 Photo albums garner extra attention because they have a unique appearance on users’ News Feeds; users are likely to click on the album and browse all of the photos, rather than viewing the photo as it appears embedded in their feed. Rather than posting a video
directly, consider posting a photo of that video and a link to it, increasing the number of users who engage directly in your organization’s website or YouTube channel. You can do this by posting a link to the video, clicking x to remove the direct streaming feature, and then uploading an image of the video on the same post.⁶

**Add extra text.** Although this tactic shouldn’t be used too often, it can be valuable to write more text in a post than Facebook will display automatically. This causes the “see more” button to appear on users’ News Feeds. Users will be prompted to engage by clicking this button, improving your page’s statistics such that Facebook will feature it on more users’ News Feeds. Longer posts will also show your audience that you’ve put time and care into your communication, potentially leading to more shares. One way to increase post length is to include the French translation (or another relevant language) of the content following the English version.⁶

**Use analytics.** Facebook provides statistics on your page’s traffic, engagement level, and leads.⁷ Your organization should be sure to take advantage of these statistics. They allow you to see who you are connecting with and evaluate how to connect with new target audiences. Beyond the basics, there are many interesting ways you can use Facebook analytics. Carter recommends evaluating which days your fans are more and less responsive, by measuring the number of likes and comments per post, per day of the week. Use this information to design a Facebook schedule that takes advantage of users’ activity, posting more material on more active days as well as more important material. This tip can be extended to evaluating engagement of your networks on all types of social media platforms. For specifics on how to calculate this information on Facebook, see the Resources section of this module.¹⁰

**Steps to Take**

1. Work to ensure your organization, most importantly social media managers, understand the basic characteristics and values of Facebook for nonprofits.

2. Follow our tips for Facebook use and also seek out other sources for Facebook best practices. Examine the way organizations that are successful on Facebook use the site in order to better inform your choices.

**Resources**


**References**


Module 12: Twitter
Learning Objectives

At the end of this module, readers should understand:

- The **basics of Twitter**, including how it works and what is it best used for
- Some **tips for using Twitter successfully**
- A **useful way to categorize the content and intention** of nonprofits’ tweets

The Lesson

This module will explore the social media platform Twitter. First, the platform will be described to facilitate strong understanding of its components and their uses. Next, some tips for using Twitter successfully will be described. Last, the practices of U.S. nonprofits on Twitter will be broken down to help inform your own organization’s decisions.

Description

**Background.** Twitter is a microblog, a type of social media platform that allows users to interact using short messages.\(^1\)\(^,\)\(^2\)\(^,\)\(^3\) Twitter is one of the most popular social media sites in the world, boasting over 200 million active users.\(^3\) Although it was at one time considered a social networking site, in 2010 Twitter began rebranding itself as an information network.\(^4\) It is a major marketing tool, platform for political campaigning, and is said to have helped facilitate major social movements such as the Arab Spring and protests in Brazil.\(^3\) Also, Twitter is recognized as an important resource for academics, allowing them to stay on top of news in their field and network with other professionals.\(^5\)

**Basics.** Twitter functions based on a 140-character limit for posts.\(^5\) Users post their own content as tweets, they are followed by others in their network, and have the option to follow others’ tweets. Notably, the site is set up with a main focus on conversations, with much less importance placed on identity than social networking site like Facebook.\(^6\) Each user has a personal profile that usually provides limited personal information (or creates an online alias). Posts, called tweets, are mainly made up of text, but can also include shortened links to photos and videos (such that the character limit is not eaten up by a link).\(^7\) Users have personal feeds that display the tweets of the accounts that they follow. Users have the option to retweet others’ posts, favourite them, and/or respond to them. Users can also send direct and private messages to other users, or tag them in posts publicly.

**Nature of conversation.** The design of Twitter, by nature, “allows for more opportunities for direct interactivity, two-way exchange of information, network creation, and public, open dialogue.”\(^8\) The site’s 140-character limit facilitates fast, synchronous conversations that can be brief, or ongoing throughout a period of time.\(^5\)\(^,\)\(^7\) The frequent use of Twitter mobile apps makes it possible for users to tweet in real-time, throughout all hours of the day.\(^5\)\(^,\)\(^7\) Due to the newsfeed function and the fact that users post frequently, tweets are
quickly archived into the past. The average lifespan of a tweet is 90 minutes. This pushes users to constantly check their accounts for the most relevant and up-to-date information. Kietzmann says, “When Twitter is used correctly, participants should feel that they have an up-to-the-minute personalized news feed and are participating in relevant and meaningful conversations.” However, it is important to note that Twitter is best used for staying on top of relevant, up-to-date conversations, and not for sharing deeper, richer information.

**Hashtags.** Another important feature of Twitter is the hashtag function, in which users tag their posts with common phrases directly preceded by the hash or pound sign (i.e. #hashtag). Twitter aggregates posts with the same hashtag, building pages that show all conversations occurring on the site over a common topic. This feature allows popular themes on the site to be identified at any given point in time. Users can connect over common discussion topics, helping to form new networks. Users can also intentionally link their conversations using a common hashtag, such as for a particular conference or event. By adding this hashtag to any post related to the event, these comments are aggregated in one space that summarizes what everyone on Twitter is saying about the event. This tactic was used successfully for the 2012 General Meeting of the American Society for Microbiology, for which the hashtag #asm2012 was used. So many people tweeted about this event that it was featured on Twitter’s main page as a “trending” topic.

**Tips for Using Twitter**

**Set up your profile.** Ensure you select an appropriate user name, an engaging profile photo (likely your organization’s logo), and concise but interesting information for your profile description. These details will help engage users that want to view your profile before deciding to follow you.

**Start following.** Explore the conversations happening on twitter, search for organization that are relevant to you, and think about who’s content you want to follow. Who your organization chooses to connect with on Twitter will be important to extending its network. Your feed will be made up of tweets from those that you follow, so you should think about what conversations you want to remain aware of. Start slow, pay attention to whose content you value, and be prepared to revise your list as necessary. You may find some users tweet too often or tweet uninteresting content that fills up your newsfeed. To revise your feed, you have the option to unfollow accounts in addition to following new ones.

**Tweet.** This may be the most difficult task to succeed at on Twitter, and organizations should be advised to dive in with confidence. There is no need to “wait for full-time staff or perfect content curation” to become a part of the conversations happening on Twitter. Work to engage your followers with interesting, recent information that show’s your community what is going on in your organization’s field and networks. Add links to more detailed information where possible. Consider tweeting insightful quotes on occasion.

**Engage and build your network.** To engage and expand your network, try to post content that sparks authentic dialogue. Retweeting others’ content (so their tweet is reposted to all of your followers, from your account) is a great way to forge connections and show your respect for their voices. Favouriting and commenting on users’ posts is also important. You can even send a tweet directly to another user’s account by tagging them in
the content (i.e. @UserName), a useful tactic for forging connections that should be used sparingly. Last, make sure you respond promptly to users that engage with you on Twitter, through retweets, comments on your tweets, favourites, and direct messages. All of these activities can encourage others to follow you because it establishes trust and mutual respect necessary to build an online (and perhaps also offline) relationship.

**Tweet your other content.** Twitter is a great place to promote the other activities of your organization. Online content from other social media platforms or from your organization’s website should be linked to frequently in your tweets. Also, your organization should speak to its offline activities via Twitter and can do so by promoting upcoming events.

**Make a schedule.** The fast-paced nature of Twitter means that your organization needs to tweet frequently, but deciding just how often to tweet can be difficult. Part of an organization’s voice on Twitter will be determined by the frequency of its posts; followers will have judgments about whether you post too often, not enough, or just the right amount. Smith suggests five tweets per day is the optimal number, but advises that there is no need to adhere to this number exactly each day. Similarly, Mansfield recommends four to six tweets per day. Harley Davidson tweets once per day, which is enough to keep their brand visible while not crowding followers’ feeds with information. No matter what frequency your organization decides on, reflect on how this choice meets the goals of your organization. If you want users to follow you to know about all recent news in your organization’s field, post many times a day. If you want to post content only related to your own events and work, less often may be better. Also, consider your available resources; if you cannot post valuable content multiple times a day, opt to post interesting material less often. To help with resource constraints, tools such as HootSuite can be used to automate the times pre-written tweets are posted (see Module 16: Social media management). Make sure you use these services only when necessary, since users can often detect when accounts are robot-run, and this will lower your organization’s authenticity online.

**Use ethical conduct.** According to Bowen, "Courts have ruled that libel can take place via publication on Twitter. Now that the Library of Congress is archiving all Twitter transmissions, there is little doubt that tweets are indelible, published public speech." Take responsibility for the content of your tweets and know that they have the power to tarnish your organization’s reputation and success. If your employees or volunteers tweet on personal accounts, make sure they identify these accounts as so. If you pay individuals to endorse you, make sure they are transparent by indicating that they are officially representing your organization. Also ensure you check facts on the content you post and the context in which you post that content. This can help you avoid unforeseen conflicts, such as posting content that may upset a fellow organization or be misinterpreted by important stakeholders in your organization’s success. (See Module 17: Developing social media guidelines for more on this.)

**Nonprofits on Twitter**
To finish this module, we will briefly describe the ways nonprofits are using Twitter to engage their publics. Lovejoy analyzed the Twitter practices of the 100 largest nonprofits in the US, elucidating important information about how these organizations take advantage of Twitter’s social networking capabilities.

Lovejoy identified a typology for nonprofits’ use of Twitter, breaking it down into updates for informing, building community, and prompting action.

**Informing.** Nonprofits tweeted with the primary purpose of providing information 59% of the time. This includes spreading information about their organization, its activities, or any other information that would be interesting to followers. By nature, this communication is mainly one-way and includes links to further, more detailed information.

**Community.** Other tweets (26%) were made with the purpose of fostering relationships, creating networks, and building communities. These tweets prompted or contributed to conversation. They were often about acknowledging others’ content and thanking users for their contributions (13.2% of tweets).

**Action.** These tweets had the primary aim of getting followers to take action, in the form of donating, purchasing, attending, joining, protesting, volunteering, applying, voting, or “learning how to help”.

Based on this information, organizations can be categorized as information sources, community-builders, and promoters. Consider how your organization wants to be seen on Twitter, and how the type of content you post affects your voice.

**Steps to Take**

1. Work to ensure your organization, most importantly social media managers, understand the basics of Twitter and what it is best used for.

2. Follow our tips for Twitter use and also seek out other sources for Twitter best practices. Examine the way organizations that are successful on Twitter use the site in order to better inform your choices.

3. Use Lovejoy’s breakdown of nonprofit practices on Twitter to inform your own organization’s choices. This breakdown can also be useful in evaluating the goal of each tweet your organization makes.

**Resources**


**References**


Module 13: LinkedIn
Learning Objectives

At the end of this module, readers should understand:

- The value of setting up a LinkedIn account for their nonprofit
- Details of LinkedIn, including its basics, professional focus, and the groups function for nonprofit organizations
- Some tips on how nonprofits can use LinkedIn successfully

The Lesson

LinkedIn, although not as widely popular as Facebook and Twitter, is an important social network for nonprofits to tap into. Using valuable information provided in Mansfield’s book, Social Media for Social Good: A How-To Guide for Nonprofits, this module will briefly describe the social media platform and how organizations can use it to their fullest advantage.

Description

Basics. LinkedIn is a social networking site that boasts more than 100 million users from over 200 countries. Its primary purpose is to facilitate networking among professionals, and every professional and nonprofit organization should seriously consider making their own account on the site. Although users are prompted to share less personal information than on a social networking site like Facebook, profiles are central to the site. User profiles act almost as online resumes; they include details of professional employment, education, and skills. Users can “connect” with other professionals on the site (known or that they would like to know), join “groups”, and engage in “answers”. Also, users can “claim” company pages, which are official pages for different organizations. Your organization should have a company page on LinkedIn.

Professional focus. One important characteristic of LinkedIn is that it was built specifically for professional networking. This removes some of the ambiguity professionals face when using social networking sites like Facebook, where the line between personal and professional can become vague. LinkedIn is ideal for those who do not want to merge these two aspects of their lives, as well as any professionals looking to build stronger connections with their professional networks.

Groups function. The benefits of LinkedIn for nonprofit organizations can be harnessed by using the site’s “groups” function successfully. Many nonprofits have not yet tapped into the potential of LinkedIn groups, and those who have often abandoned their efforts due to lack of understanding. Those organizations that have stood by their LinkedIn groups are now beginning to see benefits, encouraging others to begin to engage with this social media
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Canadian Coalition for Global Health Research

platform.¹

Tips for Using LinkedIn

Set up your group. To begin, set up a group by clicking “Groups” on LinkedIn, followed by “Create Group”. Although many nonprofits name their group directly after their nonprofit, consider if a more general, topically themed name will be more interesting to users. Sometimes, the name of your nonprofit may narrow the number of LinkedIn users interested in engaging more than a generic name would do. You can change your group name up to four times, and should settle on the name that gains the most attraction (measured via number of new members).¹

Require approval to join. Set your group such that its manager must approve member requests. This will keep your organization's level of engagement up, as it requires social media managers to log in frequently to accept requests. While logged in, managers should also be moderating discussions to keep engagement up, and removing any spam. In accordance with this setting, utilize the Group Templates feature (under "Manage > Templates") such that users who request to join receive an email thanking them for their interest, and recently approved members receive welcome emails. This increases positive engagement with your members with little strain on your managers.¹

Focus on topics. Make sure your group description encourages discussion on a variety of topics related to your nonprofit. This will help members understand what types of conversations you want to host, and how they can contribute to them.¹

Write group rules. Publishing expectations of your group will help members understand what type of content to post where. It will also allow your LinkedIn managers to act with transparency when removing and relocating comments that are not posted in accordance with your group rules. Make sure you remove spam, an unfortunate occurrence on the site.¹

Engage well. Engage your members by contributing to and moderating discussions regularly. Send announcements out once a month, at a predictable time, that summarizes the group activities and provides a bit of information about your nonprofits recent and upcoming activities.¹

Enable promotions and jobs. By enabling these two functions, discussions will be kept organized and on-topic. Your LinkedIn manager can move inappropriate posts in discussions, such as event promotions, to the promotions section. Enabling the jobs section allows members to share and post jobs, facilitating better networking within the group.¹

Steps to Take

1. Work to ensure your organization, most importantly social media managers, understand the basic characteristics and values of LinkedIn for nonprofits.

2. Follow our tips for LinkedIn use and also seek out other sources for LinkedIn best
practices. Examine the way organizations that are successful on LinkedIn use the site in order to better inform your choices.

Resources


References


6.0 Executing and Managing the Strategy

Module 14: Interacting Online

Learning Objectives

At the end of this module, readers should understand:

- The importance of curating social media content well
- How to curate your organization's content, considering content value and types, choosing platforms, scheduling, and conversation.

The Lesson

This lesson will focus on one specific element of using social media: content curation. Content curation refers to how you decide on the content of your social media activity and how it is communicated online, from the actual words you post to the frequency and time of posts. Thinking strategically about these factors has important implications for your organization's success.\(^1\) In marketing, it has been shown that small details about using social media, such as the day of the week, time of day, and choice of content, affect audience response.\(^2\) Saxton and Guo claim that content curation allows firms to “mobilize stakeholders, build meaningful relationships, and ultimately foster increased accountability and public trust.” [cited in 3] Here, we will explore different aspects of content curation that
your organization should consider: value of content, type of content, choosing platforms, scheduling, and contributing to conversation.

First, we provide an insightful quote on the value of good content curation:

“The important thing to realize is that we're increasingly living in a world of information overload. So when people choose to listen to you it's because you're able to separate signal from noise. You provide a clear, contextually relevant voice within the topic or topics that you create and curate.”^4

**Content value.** Likeable Media, a social media marketing group, says that social media marketing should focus on providing value through content. This logic applies to nonprofits as well. Organizations should consider what benefits their community, and individual users, will receive from each post. Remember that your organization is not only competing with other firms and organizations for users’ attention, but also with users’ friends and family. Thus, information should be compelling and focused around what will interest the users. Organizations should also consider how each post reflects their goals for using social media and the voice they want to convey (see Module 5: Setting goals and Module 6: Establishing a voice).^5

**Content types.** Rosenbaum suggests a “three-legged-stool” philosophy for the type of content you post. Your organization should be sure to post some original content, invite visitors to contribute their own content, and repost interesting content such as links and articles from elsewhere on the internet. Be sure that you share others’ content fairly by taking the time to provide credit and links back to original sources. This is an important part of the social media culture that promotes collaboration and sharing of ideas, so you must be sure to follow the expected protocol. This comprehensive approach to curating content will increase the quality of your posts and users will be more likely to return to you for similar information in the future.^4

**Repost content.** Use social media platforms to promote sharing of information that your organization already shares through other media channels (i.e. its website).^6 However, make sure you don’t post identical information to each platform or sync posts to multiple platforms. Instead, present your content in a way that is responsive to the specific platform’s characteristics (i.e. shorter messages on Twitter).

**Choosing platforms.** Posting on multiple platforms, according to where your target audience lives, is an important consideration in content curation. Make sure the content you post on each platform is catered to its unique characteristics and strengths. For example, use platforms such as Twitter for “short, speedy, and numerous conversations” and blogs for deeper, meaningful pieces that involve less interaction with the audience.^1 For further guidance in defining your target audience selecting social media tools to engage on, see Module 8: Reaching target audiences, Module 9: Social media tools, and Module 10: Choosing your tools.

**Scheduling.** In deciding when and how often to contribute on your social media channels, create a schedule. Audiences will respond well to consistency and regularity in the way your organization posts. As a result, readers are more likely to become loyal followers, and new users are likely to be brought in. For example, by posting at the same time each week,
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readers will know when they can expect to hear from you. In designing a schedule, ensure your decisions reflect both your organization’s goals for social media use (see Module 5: Setting goals) and your available resources for managing social media (see Module 16: Social media management). Your organization can pre-schedule posts for times that its social media manager cannot get online. Although doing this too often can create an impersonal voice for your organization, it also frees up resources for more meaningful engagement. For example, if you schedule an automated event announcement in advance, social media managers can spend their time online responding to their users’ comments directly.

Conversation. Content should be posted with the intention of eliciting a response of some sort, and establishing a longer conversation. Kietzmann claims that, “Firms which know when to chime in—and, when not to—show their audience that they care, and are seen as a positive addition to the conversation; this is in contrast to firms which flood conversations that were not ‘theirs’ in the first place.” In tandem with this, organizations should be sure to not only start conversations, but also contribute to existing ones by reading others’ posts, and responding through actions such as commenting, sharing and liking on Facebook, and retweeting and favouriting on Twitter.

Steps to Take

Use the 5 tips above to guide curation of your social media content, both for individual posts and designing an overall strategy for your social media contribution.

Resources

Chang recommends a video on how nonprofits can edit the content and descriptions of their Facebook updates. It can be found at: http://www.nonprofitfacebookguy.com/how-to-edit-the-title-and-descriptions-of-your-facebook-page-updates/

Jason Hirschhorn demonstrates the success of using a schedule for content curation on his newsletter, MediaReDEF. You can subscribe to this newsletter at http://link.mediaredefined.com/join/353/subscriberesponsive

Convio’s free report, “Going Social: Tapping into Social Media for Nonprofit Success”, provides tips for both basic and advanced content sharing. This report can be accessed at http://www.councilofnonprofits.org/files/Convio_Social-Media-Guide.pdf.

References


Module 15: Integration with Existing Communications

Learning Objectives

At the end of this module, readers should understand:

- The importance of designing social media strategies that are integrated with an organization's existing communication strategies, external and internal.
- Factors to consider when integrating social media use with external communications, including successful integration with:
  - Leadership's ideas of communication
  - Offline communities
  - Traditional media

The Lesson

In order for an organization's social media strategy to be effective, it should consider how that strategy fits with other factors within the organization. Key factors to consider include integrating social media strategies with existing communications plans, and ensuring strategies reflect the organization's available resources for managing social media. Berthon offers valuable insight on this topic from the field of marketing:
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“The social involves the dynamics of networks, the power of the collective, and the wisdom and folly of the crowd. The media involves questions of how new media fit or integrate with traditional media and how marketers should manage and direct marketing dollars in the new ecosystem.”

This module will focus on the integration of social media strategies with existing communication plans. Since social media facilitates communication with large publics, this module will focus on integration of an organization’s social media strategy specifically with its external communications plan. However, it is also important for an organization to consider integration with internal communication strategies, such as how social media can be used to facilitate internal communication between management, staff, and volunteers.

Integrating with leadership’s ideas of communication

Although social media is being widely accepted as a tool that nonprofit organizations should take advantage of, the integration of social media with traditional communication strategies can be difficult. In order to successfully transition to using social media, it is important for an organization to get their management team on board. This is especially pertinent because effective social media management must use an “engagement at a par” approach instead of a “top-down” approach, and an organization’s leadership controls this type of management decision. However, in a recent survey, 58% of executives saw reputational risk and social networking as an important boardroom issue, even though it was only actually considered in the boardrooms of 15% of the companies. [cited in 1] This gap may have occurred because senior organization leaders can be unfamiliar with social media and its benefits, and therefore reluctant to adopt new strategies. Take advantage of tutorials and modules such as this series to inform your management about the purposes and benefits of using social media (see Module 2: The value of social media for more information). Even if an organization’s leadership does not fully understand the operational details of using social media, gaining an understanding of its main purposes and benefits can help facilitate the organization’s transition to using social media. Also consider if your organization’s staff and volunteers have a social media mentality, and if not, work to educate everyone.

To the right, we provide a table from Convio2 on how to get your management on board with your social media strategy.

Table 1. Getting management on board2
Integration with offline communications

Although having an online presence is necessary for organizations, it is important that this presence is complimented by continuing to engage the audience through offline channels. Organizations should recognize that despite many benefits, social media has limitations and thus cannot replace existing communications strategies. For example, engaging supporters through telephone calls and face-to-face interactions contributes to relationship building in a way that is difficult to accomplish through online interactions alone. Thus, the most successful organizations integrate both online and offline communications, utilizing “various channels in people's everyday lives and [increasing] opportunities to both introduce and reinforce messages”.

In this way they are able to draw on the unique benefits of each.

Integration with traditional media

Whereas offline communications refers to any communication channels that are not digital, traditional media refers specifically to channels that allow organizations to broadcast messages to the public. Traditional media include offline media such as advertisements on television and radio and in newspapers and magazines. However, they also include online media such as banner advertisements on websites (which are not social media).

Nonprofit organizations are likely to have traditional media strategies in place, and therefore must be sure any new social media strategies are integrated with them. Both media channels contribute to corporate image in important ways. Traditional media is mainly about capturing attention via reach to large audiences, whereas social media also involves capturing the continued attention of audiences via strong engagement. A recent survey showed that 70% of Americans learn about causes and social issues over traditional media channels, and 47% learn about them from social media and online channels. Thus, successful nonprofits will establish a strong balance between use of traditional media and social media. They will actively use both types of media, using social media to point to traditional media and vice versa. This coordinated activity can be used to “seed and drive conversations, sharing [and] relationships”.

Although traditional media still has a place in communications strategies, organizations should remember that its audience members have new expectations about how they will be able communicate with organizations (see Module 3: Understanding social media). Hanna provides insight on this topic:

“Consumers are no longer content with advertising as a bystander sport (i.e., where traditional media is controlled by the advertiser in a firm-consumer monologue of sorts) or as a hunting sport (created by the advertiser with the consumer controlling the interactivity). Consumers now expect to be active participants in the media process. This requires new approaches to media strategy, involving media that do not simply re-place traditional media, but rather expand media choices so as to capture reach, intimacy, and engagement.”
In summary, organizations should be sure to take the strengths of each type of social media into account, and work to design a modern communications strategy that integrates new media channels, such as social media, with traditional ones.

**Steps to Take**

1. Ensure your organization’s leadership understands the purposes and benefits of using social media. Teach them the basics of social media by using free tutorials, such as this series of modules. Get them on board to promote your organization’s transition to social media, because this will be necessary to find success in social media use. Encourage leadership to also learn about the details of social media. Also work to adjust the mentality of all staff and volunteers towards social media use.

2. Ensure your social media plan is integrated with offline communications, such as more meaningful interactions that are facilitated by telephone calls and face-to-face conversations. Don’t compromise your offline strategies when beginning to use social media.

3. Work to integrate your social media plan with traditional media strategies, drawing on the benefits of each to create a holistic external communications plan.

4. When possible, rewrite communications strategies for your organization such that social media best practices are included. This will solidify any decisions you have made about integrating social media practices into existing communication plans.

**Resources**

Refer to the References section of this module for further and more detailed readings on integrating your nonprofit’s social media strategy with existing communications strategies.

**References**


4. Kaplan AM & Haenlein M. Users of the world, unite! The challenges and opportunities of
Module 16: Social Media Management

Learning Objectives

At the end of this module, readers should understand:

- Various factors to consider in managing social media, including
  - **Who has access** to your organization’s social media presence
  - **Who has administrator rights**
  - **Who will act as your voice** online
  - **How to organize activities** using tools like calendars and online management tools
  - **Evaluating your organization’s management capacity**

The Lesson

There are many important considerations to make when designing your organization’s social media strategy, yet one of the most important of all is in regards to management. Any organization’s social media strategy should reflect its available resources, and should include a plan for how that strategy will be managed into the future. Here, we will begin to explore how an organization can manage its social media presence successfully. However, there are many free resources available that advise on this subject, and we encourage your organization to explore them independently. Some good starting points are listed in the Resources section of this module.

**Consider access.** An important factor in managing a social media presence is considering who will have access to that presence. Some employees and volunteers will be given internal access, allowing them to contribute content through your organization’s social media accounts, while others will be able to access your presence externally, from their personal social media accounts. Making decisions about who can access your presence, how they can access it, and from where, is important for effective social media management.

**Remove blockades at work.** First, check to make sure your employees and volunteers can access relevant social media sites at work. These sites are sometimes banned to keep employees from ‘socializing’ at work, however as your organization builds a social media presence it is important all workers can access your presence. Even those who do not contribute content directly should keep up to date on your organization’s social media activities by following its presence on all platforms it uses.
Training. Adopting a social media presence may be difficult because many organizations’ employees and volunteers do not have the necessary information technology and communication skills to use social media successfully. Berthon\textsuperscript{1} uses a prime example to illustrate this challenge. “For example, Deloitte LLP (2009) study found that while 74% of employees surveyed said it is easy to damage a company’s reputation on social media, a mere 17% of companies have programs in place to monitor and mitigate the potential reputational risks related to social network use.”\textsuperscript{1} In order to minimize risk and maximize benefits when using social media, ensure all members of your organization are given appropriate social media training – whether they will be posting on behalf of your organization or not. There are a variety of low-cost webinars available to teach staff, interns, and volunteers about social media use.\textsuperscript{2} Also, many blogs provide up-to-date information on social media and mobile technology.\textsuperscript{2} Develop a social media policy that will guide all members’ online behaviour following training (see Module 17: Developing social media guidelines).\textsuperscript{1}

Choose your voice. Since a strong social media strategy will include clear organization goals and an established voice (see Module 5: Setting goals and Module 6: Establishing a voice), it is important to consider who will actually create that voice. Armano (2009) suggests that organizations should “...identify employees who have the ability to listen and who care about the chatter online, and those who can create content that is emotionally appropriate for the community.” [cited in 3] Communications staff should not be expected to add social media to their workload without serious acknowledgement that managing social media is a job in itself.\textsuperscript{2} Additionally, interns and volunteers may lack necessary training to manage your organization’s social media presence.\textsuperscript{2} Remember that this is an important and challenging task, and ensure that anyone you select must be given adequate training.\textsuperscript{2} Identify one or a group of individuals to build your consistent voice online, but also consider bringing in guest contributors from your organization on occasion. Remember that users can sense the difference between individually-managed accounts, and group-managed accounts.\textsuperscript{4} If your organization’s social media presence is going to be managed by a group, make sure they use a unified voice that users will recognize as genuine. Also make sure you delegate responsibilities clearly between social media managers to reduce confusion and inconsistency online.\textsuperscript{5} If your organization decides to hire a consultant to establish its social media presence, conduct due diligence to ensure opportunities for your organization are maximized and risks are minimized.\textsuperscript{6}

Give managers power. Ensure your selected social media managers understand your organization’s entire social media strategy, and that they have the power to solve issues that arise online directly. Without this power, they may rely too heavily on consultation with management, or create band-aid solutions that put your organization’s brand at risk. Have a system in place for how your social media managers should address issues and make decisions regarding social media, including which organization leaders they should connect with when necessary.\textsuperscript{6}

Create an administration system. After deciding who will contribute to your organization’s social media presence, make clear decisions about who will have the passwords and administrator rights over your social media accounts. This should include all regular social media contributors, but may also include managers who do not contribute directly (i.e. a member of the organization’s leadership). To keep your accounts secure,
However, your organization may want to consider not giving passwords and administration rights to occasional social media contributors, and temporary workers like interns and volunteers. Make sure you save all of your account passwords in one common, safe location. Create clear guidelines for social media usage to ensure contributors meet your organization’s expectations for ethical conduct (see Module 17: Developing social media guidelines). This will help prevent unnecessary implications as a result of your organization’s social media interactions.

**Evaluate your capacity.** To help evaluate your organization’s social media capacity, plan to begin by experimenting with social media tools. Try to become familiar with your voice, which will be based on content, timing, and frequency of posts. Keep your social media action small-scale by involving fewer managers until you have enough experience to refine policies and strategic plans.

**Make a calendar.** Organizing and pre-planning social media activities can help you maintain consistency in your online interactions and be more successful at reaching your organization’s goals for social media use. By planning ahead, you can create a comprehensive and well-balanced social media presence. Your time spent online will also be more efficient because you won’t have to start each day from scratch.

**Use management tools.** There are many tools available to help manage your organization’s presence on various social media platforms. HootSuite is among the best options for managing your platforms. It allows management of Twitter, Facebook, Google+, LinkedIn, Foursquare, WordPress and Mixi on one interface. One useful feature of HootSuite is a scheduler. Social media managers can write posts in advance, and HootSuite will post them at a pre-selected time. Although this feature can be useful for days and times your managers are not available, avoid relying on them too heavily. A genuine social media presence requires human interactions, not robotic posting. Other useful management tools include Tweetdeck and Spredfast.

**Steps to Take**

Use the guidelines provided above to inform your social media management considerations. Remember that managing social media can be challenging, and it will take time to master your strategies. Start small and be clear and deliberate about your management decisions.

**Resources**


Spredfast, another social media management tool, can be found at [http://spredfast.com](http://spredfast.com).
Tweetdeck is a social media management tool specifically designed for Twitter. It can be found at https://about.twitter.com/products/tweetdeck.

References


Module 17: Developing Social Media Guidelines

Learning Objectives

At the end of this module, readers should understand:

- The importance of writing social media guidelines for their own organization
- Some main ethical guidelines to consider when writing this policy
- A set of ethical guidelines that can be adopted directly if fitting with the goals of the specific organization

The Lesson

To consolidate your learning about social media and to help guide your organization’s social media actions, it will be necessary to write a set of social media guidelines, or a social media policy. This will ensure all members of your organization that manage or contribute to its social media presence have a set of clear expectations to follow. As Keitzmann\(^1\) notes, “Social media involvement is not an exact science, but to reduce the ambiguity, firms should develop policies that outline how their employees look after and preserve different forms of social media engagement.” Your social media guidelines may differ from a social media strategy in that they are clearly focused on ensuring all social media actions are consistent with the organization’s codes for ethical conduct. The social media strategy, on the other hand, may include broader goals for social media use, establishing the organization’s online voice, and ideas about content curation (see other modules in this series for detail on factors to consider in your social media strategy).

According to Bowen,\(^2\) "although the legal ramifications have been explored (Terilli, Driscoll, & Stacks, 2009) there are few ethical guidelines to govern the arena of social media." However, it is recognized that interacting online can have certain implications for an organization, making a set of social media guidelines an important tool. The following are a set of considerations Bowen\(^2\) suggests organizations should make when designing social media guidelines. This is followed by a table from Bowen's research, proposing a set of general ethical guidelines for social media. Your organization should consider these guidelines when establishing its own social media policy, and potentially adopt them directly.

**Be transparent.** Acting in a transparent manner can prevent audiences from being misled about your organization’s intentions or meanings when it contributes on social media. Communication should be identified as individual speech or speech on behalf of an organization. All individuals that contribute social media content for your organization should be required to identify any personal social media interactions as such. Any personal posts that are sponsored by your organization (such as from a celebrity) should also be identified as such.\(^2\)
Be clear and consistent. Encourage social media managers to post clear messages. They should maintain a sense of responsibility for the content they post. Managers should also be consistent in how and when they post, because this allows them to build trust and understanding with their audience that is a key component of strong relationships.²

Check your facts. Also, social media managers should be required to check facts on the information they post. They should consider the content of their posts rationally before posting, examining messages from all possible perspectives to prevent misunderstandings by the audience.²

Be good. As Bowen² suggests, “Encourage the good, helping to build connectedness, engagement, and community.” Following this logic, in every post, have contributors consider their intention, which should reflect the organization’s social media goals as well as simple, good intention.

Table 1. Ethical Guidelines for Using Social Media²

<table>
<thead>
<tr>
<th>#</th>
<th>Guideline</th>
<th>Rationale/Implementation*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Be fair and prudent</td>
<td>Consider fairness, justice, access. Consider right to know.</td>
</tr>
<tr>
<td>2</td>
<td>Avoid deception</td>
<td>If it is deceptive, even arguably, simply do not do it.</td>
</tr>
<tr>
<td>3</td>
<td>Maintain dignity and respect</td>
<td>Ensure that the communication maintains the dignity and respect of the involved publics.</td>
</tr>
<tr>
<td>4</td>
<td>Eschew secrecy</td>
<td>Barring trade/competition secrets, if an initiative warrants secrecy, something needs ethical examination.</td>
</tr>
<tr>
<td>5</td>
<td>Is it reversible?</td>
<td>How would you feel on the receiving end of the message? Is it still ethical then?</td>
</tr>
<tr>
<td>6</td>
<td>Be transparent</td>
<td>Paid speech should be transparently identified as such by “(Endorsement)” ”(PaidMsg)” or similar phrasing.</td>
</tr>
<tr>
<td>7</td>
<td>Clearly identify</td>
<td>Personal speech and opinion versus speech as a representative of the organization should be identified.</td>
</tr>
<tr>
<td>8</td>
<td>Rational analysis</td>
<td>Examine messages from all sides; how would it look to other publics; how could it potentially be misconstrued?</td>
</tr>
<tr>
<td>9</td>
<td>Emphasize clarity</td>
<td>Even if the source or sponsorship is clear … make it clearer.</td>
</tr>
<tr>
<td>10</td>
<td>Disclose</td>
<td>Transparency in message creation and facts/data needed for an informed decision.</td>
</tr>
<tr>
<td>11</td>
<td>Verify sources and data</td>
<td>Be consistently credible; do not use rumor or speculation.</td>
</tr>
<tr>
<td>12</td>
<td>Establish responsibility</td>
<td>Does the message maintain your responsibility to do what is right?</td>
</tr>
<tr>
<td>13</td>
<td>Examine intention</td>
<td>Is your decision made with good will alone?</td>
</tr>
<tr>
<td>14</td>
<td>Encourage the good</td>
<td>Does your message help to build connectedness, engagement, and community?</td>
</tr>
<tr>
<td>15</td>
<td>Consistency builds trust</td>
<td>Consistency allows publics to know and understand you, and you can meet their expectations.</td>
</tr>
</tbody>
</table>

*Note. The level of analysis can be changed by using the words “campaign” or “initiative” instead of “message,” which is used here for simplicity.
Steps to Take

Follow the suggestions for social media guidelines explained above to develop a set of social media guidelines specific to your organization. Consider adopting Bowen’s “Ethical Guidelines for Using Social Media” directly, or adapt them accordingly to your organization. No matter what guidelines you choose to produce, make sure you are considering the ethics of your organization’s interactions online, and how to guide all social media contributors to meet your organizations expectations in this regard.

Resources

Refer to the References section of this module for further and more detailed readings on developing social media guidelines.

References


Module 18: Monitoring and Evaluation

Learning Objectives

At the end of this module, readers should understand:

- The importance of monitoring and evaluation of a nonprofit’s social media activities
- The meaning of return on investment and perspectives on how to evaluate it in terms of social media use
- Factors to consider when monitoring and evaluating social media activities, including,
  - Evaluating holistically
  - Defining measures for success
  - Being realistic
  - Using an ongoing lens
  - Evaluating reputation
  - Monitoring conversations
  - Using available evaluation tools
The Lesson

Monitoring your organization's social media activity and evaluating its success is a critical component of any social media strategy. According to Convio,1 "Communications and marketing efforts should always be accompanied by proper reporting and metrics that gauge effectiveness and help practitioners learn how to improve future efforts." Although in the past this may have been a difficult task, there are now many tools available to conduct social media monitoring and evaluation, and firms are widely expected to use them.2 This module will explain what it means to monitor and evaluate your organization’s social media practices, and explore some of the various perspectives on how organizations should go about doing this.

Return on investment. The field of marketing frequently turns to the term “return on investment” (ROI) when talking about social media spending. Often, an organization’s management team will require proof of ROI to ensure social media activities are successful.5 There is little doubt that every organization should have its own method for measuring ROI, such that they can determine if their resources are producing the outcomes they desire at an efficient level.3 However, organizations need to think differently about investment in social media than they would about traditional media. Convio1 has redubbed ROI as “return on engagement” in order to better reflect the evaluation needs of nonprofits on social media. Where traditional media focuses on splitting a set budget across media channels, to deliver a market-constructed message, social media spending focuses on getting users to deliver the message of the brand further than the organization can alone.5 Successful social media use requires a much less significant budget than traditional media channels.4 Rather than spending or investing using cash, social media requires investment in the form of social currency, through “conversation, sharing, supportiveness, [and] helpfulness.”5 Time well-spent on social media will include identifying influential social media users who have the power to spread your brand’s message. Social media tactics such as contests and promotions encourage other users to publicize your brand-related messages. For example, your organization may ask users to share a message in exchange for entrance into a contest. Since entrants’ networks will then see your post, this action takes advantage of users’ influence by extending your reach into new networks.5

Here, we present a set of guidelines on how to measure ROI.

Table 1. Convio’s “ABCs of Social Media ROI”1

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Evaluating holistically. There are many tools available to gather data about your social media presence, however, Likeable Media\(^2\) claims, “The current methods that brands use to track metrics aren’t optimal. Some brands are considering virality of content, while others are concerned with number of Twitter retweets, and still others are focused on post reach.” Rather than looking at metrics of different social media platforms in silos, they recommend a more holistic approach that looks to an organization’s overall “likeability”. Analyzing likeability involves listening to your community before any analysis, such that trends and opinions can be better understood.\(^6\) It also involves evaluating any type of interaction (not just deep engagement) such users simply viewing your page. Organizations should analyze kinetics, or the continued motion of conversations, which can be measured by looking at responsiveness. For example, Likeable Media quotes that “50% of Facebook users and 80% of Twitter users expect a response to a customer service inquiry in one day or less”.\(^2\) The ability to keep conversations moving on social media is an important trait for organizations. Last, the extension, or reach and size of your community, should be analyzed. Together, these factors create a more complete picture of an organization’s success using social media.\(^2\) (See Resources section for more information on this model, called the “Likeable Index”).

Defining success. Chang\(^7\) argues that organizations must define what success means to them, based on their goals for using social media, and then determine concrete ways to measure the level of success they have reached. For example, an organization focusing on building networks may partially measure success by the number of new individuals joining their network, or a benchmark increase in the number of interactions between network members.
Being realistic. Since there are so many metrics that can be used to measure your nonprofits social media success, try to start small by measuring the 10 to 15 metrics that are most important to you. This way you can be sure to conduct effective evaluations are will be less likely to become overwhelmed with data. As you become comfortable with these, consider adding other metrics that will help you evaluate your organization’s online success.

Ongoing lens. First, make sure you evaluate your metrics in an ongoing manner, so you can see your organization’s progress over time. There are many tools available to help generate reports of your social media metrics and activities over time. Also, it is important to maintain an ongoing perspective for monitoring and evaluation techniques, as the social media landscape evolves quickly. Organizations should continuously work to understand the environment and be willing to adapt evaluation techniques accordingly. In this way social media activities can be evaluated in a way that is well-aligned with the true engagement needs of the community.

Evaluating reputation. Keitzmann speaks to the value of measuring an organization’s online reputation, which is based on established trust and the value of posted content. The system used to evaluate reputation should reflect the engagement needs of the community. For example, if the community values time and activity, measuring the number of posts over time may be an appropriate metric. Once a metric has been selected, an appropriate tool must be employed to conduct that evaluation. Tools could be based on objective or subjective data, such as number of page views or a rating system utilized by the public, respectively.

Monitoring conversations. In addition to monitoring and evaluating your organization’s social media activity, it is important to monitor the conversations occurring in your online networks, and in surrounding networks. This can allow you to locate content of interest and understand the diverse views and perspectives of your organization’s key stakeholders (i.e. its supporters, volunteers and donors). Some large companies can afford to create their own “social media mission control centres” for monitoring and evaluation practices. However, even as a small nonprofit it is possible to do some of these things with free tools, such as listening to ongoing conversations and searching online for organizations and individuals of interest.

Use available tools. Last, make sure you take advantage of the myriad of free social media analytics tools available online. Convio provides a comprehensive chart of available tools, provided below.

Table 1. Social media tools for monitoring and evaluation
Steps to Take

1. Understand the importance of monitoring and evaluating your organization's social media activities and online networks.

2. Develop a monitoring and evaluation strategy for your organization that takes into account the factors explored in this module. Be sure you incorporate key ideas, such as setting realistic targets and choosing metrics that will accurately measure your organization's success at meeting its defined targets. Use tools available to make these tasks easier. Remember to focus on the big picture and avoid getting bogged down with what feels like too much data.
Resources

Beth Kanter provides extensive resources on evaluating a nonprofits social media success. You can access a case study examining one organization’s success at http://www.bethkanter.org/momsrising-key-results/. Kanter’s book, “Measuring the Networked Nonprofit” may be of particular use to organizations seeking comprehensive measurement strategies for their networking activities.

Social Mention is a social media service site that aids firms in monitoring and evaluation. It can be accessed at www.socialmention.com.

Likeable media can be hired to evaluate firms’ success on social media using their unique “Likeable Index”. For more information visit http://www.likeable.com/.

Convio’s report on social media for nonprofits provides metrics to consider, generally and on specific social media platforms, but warns that before choosing metrics you should focus on defining what success means to you. They also provide basic and advanced tips on evaluation. Their report can be accessed at http://www.councilofnonprofits.org/files/Convio_Social_Media_Guide.pdf.

Some site-specific analytics tools include TweetDeck (https://about.twitter.com/products/tweetdeck) and Google Alerts (http://www.google.ca/alerts).

References


7.0 Mobile Social Media and Equitable Access

Module 19: Mobile Social Media

Learning Objectives

At the end of this module, readers should understand:

- What mobile social media is
- How it fits with the evolution of social media
- Key characteristics of mobile social media
- Tips for using social media effectively

The Lesson

This module will explore mobile social media by looking at its definition, key characteristics, and a few tips for using mobile social media to your advantage. The next module in this series will take the topic one step further, looking at the role of mobile social media in global equitable access to social media services.

Definition. Humphreys\(^1\) defines mobile social media as, "software, applications, or services accessed through mobile devices that allow users to connect with other people and to share information, news, and content." Kaplan\(^2\) suggests a similar definition, but also noting that these applications facilitate the creation and exchange of user-generated content (see Module 1: What is social media? for a definition of this term).

Social media transition. Mobile social media represents an important shift in the evolution of social media.\(^3\) While social media began as an online tool only, there is increasing use of social media from mobile devices and the lines between the two are blurring. It is suggested that mobile social media might be so compelling because it allows production, distribution, and consumption of various media on one device. In 2012, it was reported by Facebook that of the 901 million active monthly users, 488 million accessed the site from a mobile device. Also, research suggests that users are increasingly using mobile social media as a channel to access the news.\(^1\)
Key characteristics. Mobile social media shares most characteristics with traditional social media, but in addition, it can provide information about the position of the user in time or space. Thus, mobile social media can be described as time-sensitive or location-sensitive, or both. Mobile social media were initially designed to be location-sensitive, such as the app Foursquare, which asks users to “check in” to real-world locations online.\(^1\) However, more recently time-sensitive social media have become dominant, including apps for Facebook and Twitter, which are just mobile versions of the original platforms.\(^1\) Time- and location-sensitive features allow organizations to collect information about the locations and times of user activities. They also provide opportunities to engage with customers in new ways, such as through promotions that ask people to check in to different locations for a reward. However, there are important implications for security and privacy of the user’s information, such as the actual location of a user. Organizations must not misuse this type of information, and should aim to maintain relationships of trust with their users.\(^2\)

Tips for Using Mobile Social Media

Integrate your platforms. Just as you need to be sure that your social media presence is integrated with your static web presence, both types of media must be integrated with mobile social media (see Module 1: What is social media, for relevant definitions). Make sure all of your current communications are compatible with mobile devices, for example, your website.\(^2,4\) This will ensure that users are able to access your organization’s information from wherever they may be, using their mobile device.

Engage in synchronous conversations. Use time-sensitive mobile social media to your advantage, by engaging with users in a time-sensitive manner. Work to have live conversations with users such that both parties are engaged simultaneously. These interactions will help facilitate strong listening, understanding, and response to supporter needs and interests, leading to stronger relationships between users and the organization.\(^2\)

Cater messages. Use location-sensitive mobile social media to your advantage by sending users information that is catered to their location or demographic area (evaluated based on their location). Personalizing interaction based on user preferences and interests can lead to higher-value engagement.\(^2\)

Respect privacy. As mentioned previously, respecting privacy in the face of mobile social media is very important. If users interact with you over mobile social media, particularly if they share their location, this should be viewed as an action that indicates trust for your organization. You should be sure to repay this gesture with respect for their location, limiting the amount that you use that information to your advantage. For example, if sending messages catered to users’ locations, make sure you do so infrequently. Bombarding users with information catered to their personal information could be taken as a sign that you do not respect them, leading them to end their online relationship with you.\(^2\)

Encourage users to share. Word of mouth is an excellent way to spread the message of your organization and garner support in expanded networks. Encourage your online supporters to discuss and share your organization’s activities with their own networks. This
tip is not only applicable to mobile social media, but also traditional channels for online social networking.\textsuperscript{2}

**Steps to Take**

1. Make sure your leadership and social media managers understand what mobile social media is, what it means for the evolution of digital communication, and some of its key characteristics.

2. Ensure your social media strategy includes a section on mobile social media that is integrated will with Web 1.0 and Web 2.0 strategies. Use the tips for using mobile social media effectively that are outlined in this module to your advantage.

3. Using Module 20: Equitable access, for further information, consider how mobile social media can help you reach a variety of populations that may not have equal access to traditional online platforms.

**Resources**

Refer to the References section of this module for further and more detailed readings on mobile social media.

**References**


Module 20: Equitable Access

Learning Objectives

At the end of this module, readers should understand:

- The term “the digital divide” and its implications for equitable access to social media globally
- The ways in which mobile social media increase access to social media globally
- The variance in social media use across the globe
- Various statistics that explain the use of mobiles and mobile social media globally

The Lesson

This module will explore global equitable access to social media services, primarily through the introduction of mobile social media.

An important consideration in successfully implementing a social media strategy is the “digital divide”. The digital divide, a term many organizations are not familiar with, refers to the divide between those that have access to digital technologies, including social media, and those that do not. For example, in many developing countries there is limited access to the technologies that we take for granted, from basic computers to social networking platforms. In many locations, online participation is limited by lack of resources, from direct costs of using social media to indirect costs like unreliable electricity from which devices can be run. The digital divide means that access to social media worldwide is not equitable. It is important for organizations to understand this, realizing that they may not be able to communicate with all targeted audiences in the same way.

According to Kaplan, mobile social media can “be seen as another step toward Internet democratization and closing the digital divide between developed and emerging countries.” In a later article, Kaplan suggests that “mobile devices will likely penetrate the world with increasing pace, becoming the only means of communication that allows true global reach of customers in different countries and demographic groups.” The Pew Research Center, a U.S. think tank, estimates that by 2020 most people in the world will use mobile devices as their primary access point for the internet. Interestingly, while most individuals in developed countries first accessed the Internet over stationary devices and then moved to mobiles, globally, many people are getting online for the first time using mobiles. Wyche explains, “Mobile phones make it cheaper and faster for people to communicate with people in regions where infrastructures to support fixed-lines phones are underdeveloped.” The ability for mobiles to improve equitable access to social media is promising, and organizations should tap into this possibility when trying to reach global publics.
Additionally, it is important for organizations to note that social media sites may not be used in the same way in different locations across the globe. The most popular social media sites are being used across the globe, but there are also platforms utilized in some areas and not in others. If desiring to tap into social media networks across the globe, consider what sites are being used in target locations and how they are being used. Maintaining a presence on sites like Facebook and Twitter is a promising tactic for reaching a broad range of global audiences.

Here are some interesting statistics that reflect the power of mobile devices in increasing access to social media globally:

- **Mobile phone subscriptions**
  - Total 70% of the global population
  - Exceed 100% of the population in Hong Kong, Italy and Germany, where many consumers own more than one mobile device
  - 4x more in Brazil, Russia, India and China than personal computers in use (1.65 billion vs. 0.43 billion)
  - 10x more in India than personal computers
  - 82% have access in Thailand, compared to 13% who have access to a computer

- **Social media use in developing countries**
  - In South Africa, among other locations, less expensive to send a message over mobile social media than SMS. [cited in 5]
  - Facebook is the most visited website and most used social networking site in the African continent.

**Steps to Take**

1. Understand what the digital divide is and how mobile social media begins to address its barriers.

2. Consider if your target audience includes users in different geographic locations, especially those in developing countries. Research what types of social media are used in those locations and how they tend to be used. Make sure your social media strategy reflects your learning, such that all members of your target audience have the opportunity to engage with you.

**Resources**

Refer to the References section of this module for further and more detailed readings on equitable access to social media via mobile devices and mobile applications.

**References**
Social Media Best Practices for Nonprofit Organizations
Canadian Coalition for Global Health Research


2. Wyche SP, Schoenebeck SY & Forte A. “Facebook is a Luxury”: An Exploratory Study of Social Media Use in Rural Kenya. CSCW. 2013.


