

# 1. SELF-ASSESSMENT

Before we dive in, give some thought to the factors that will impact the social media channels that are likely to be useful to you. What are your assets? What are your resources? Use the questions below to help you.

1. How much time does your staff currently spend on marketing and communications tasks?
  
2. How much time do you expect to devote specifically to social media?
  
4. Which social media channels does your staff have experience with, either personally or professionally?
  - Facebook
  - Twitter
  - Blogging
  - Photo sharing sites (like Flickr)
  - Video sharing sites (like YouTube)
  
5. What assets are available to your organization?
  - Experienced writers
  - Experts in the topic area of your mission
  - Lots of organizational photos
  - Experienced photographers
  - Organizational videos
  - People with experience creating videos

## 2. IDENTIFYING YOUR SOCIAL MEDIA GOALS

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

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

- ⬆ Reach a youth audience
- ⬆ Promote an event
- ⬆ Build excitement prior to an event
- ⬆ Get people to take a particular action
- ⬆ Draw traffic to a particular online resource
- ⬆ Build your email list
- ⬆ Solicit donations for your organization
- ⬆ Get supporters to solicit donations for you
- ⬆ Recruiting volunteers
- ⬆ Branding your staff as experts on a cause or issue
- ⬆ Getting your constituents to talk to each other
- ⬆ Getting feedback from your constituents
- ⬆ Keeping your supporters updated on happenings
- ⬆ Building a community around an event or topic
- ⬆ Letting supporters publicly support your cause
- ⬆ Disseminating information about an issue or topic
- ⬆ Recruiting new members, advocates or patrons
- ⬆ Supporting a particular group of members, alumni, etc.
- ⬆ Tell stories about the work you do
- ⬆ Get press coverage
- ⬆ Connect with other like-minded organizations
- ⬆ Changing hearts and minds on a particular topic
- ⬆ Gathering photos or videos from supporters
- ⬆ Understanding what people are saying about you
- ⬆ Keeping up to date with a particular issue
- ⬆ Coordinating people in an action or a project
- ⬆ Other \_\_\_\_\_
- ⬆ Other \_\_\_\_\_
- ⬆ Other \_\_\_\_\_

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

These goals will be your focus throughout this workbook.

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

### 3. MEASURING YOUR GOALS

Now that you've identified your three most important goals for social media, let's dive deeper to figure out what exactly you are looking for, how you can measure your work and what defines success.

For each of your goals, identify the following:

- **What is the purpose?** Why is this goal important? What will be the benefit for your organization?
- **How is it measurable?** Come up with two or three quantifiable measurements to help you gauge your success. What are you able to measure that will give you knowledge about your progress?
- **What defines success?** Identify a benchmark for each measurement that will help you figure out how well you did in accomplishing your goal.

Goal	What is the purpose?	How is it measurable?	What defines success?
i.e. Encourage more youth aged 16 to 22 to volunteer.	We rely heavily on youth volunteers to staff our food pantry.	<ul style="list-style-type: none"> <li>• # of youth following or friending the organization</li> <li>• Volume or % increase in youth volunteering</li> </ul>	<ul style="list-style-type: none"> <li>• 20% increase in youth following or friending the organization</li> <li>• 5% increase in youth volunteers</li> </ul>
i.e. Build your email list.	Increased number of committed emails on list to be used for fundraising and marketing purposes.	<ul style="list-style-type: none"> <li>• % increase in the email list</li> <li>• # of people who say they joined email list because of something they saw on a social media channel</li> <li>• % increase in the email list</li> </ul>	<ul style="list-style-type: none"> <li>• 10% increase of people on your email list during a time frame when you were doing a list-building promotion through social media</li> </ul>

## 4. DEFINING YOUR AUDIENCE

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

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

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

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

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

All of your constituents	Word Bank				
<table border="1"><thead><tr><th data-bbox="391 915 963 963">People you could reach with social media</th></tr></thead><tbody><tr><td data-bbox="391 963 963 1455"><table border="1"><thead><tr><th data-bbox="537 1104 849 1152">People you want to reach</th></tr></thead><tbody><tr><td data-bbox="537 1152 849 1308"></td></tr></tbody></table></td></tr></tbody></table>	People you could reach with social media	<table border="1"><thead><tr><th data-bbox="537 1104 849 1152">People you want to reach</th></tr></thead><tbody><tr><td data-bbox="537 1152 849 1308"></td></tr></tbody></table>	People you want to reach		Alumni Board members Card holders Case managers Clients Contributors Donors Event attendees Families Former donors Foundations Friends Grantees Local businesses Members Newsletter readers Partners Past volunteers Patrons People on your email list People on your mailing list People who purchase tickets Potential donors Press Prospects Resident experts Senior citizens Staff Staff alumni Store patrons Students Vendors Visitors Volunteers Youth
People you could reach with social media					
<table border="1"><thead><tr><th data-bbox="537 1104 849 1152">People you want to reach</th></tr></thead><tbody><tr><td data-bbox="537 1152 849 1308"></td></tr></tbody></table>	People you want to reach				
People you want to reach					

## 5. A SAMPLE AUDIENCE SURVEY

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

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

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

	Never	Occasionally	Daily	Several times a day	I don't know what this means
Use Facebook	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use Twitter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use LinkedIn	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
View videos on YouTube	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
View photos on Flickr	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Read other people's blogs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Read information via RSS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Write posts for a blog	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Post videos online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Post photos online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(continued on next page)

If {your organization} were to try the following, I would likely...  
 {fill in the left column with specific tactics your organization is considering}

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

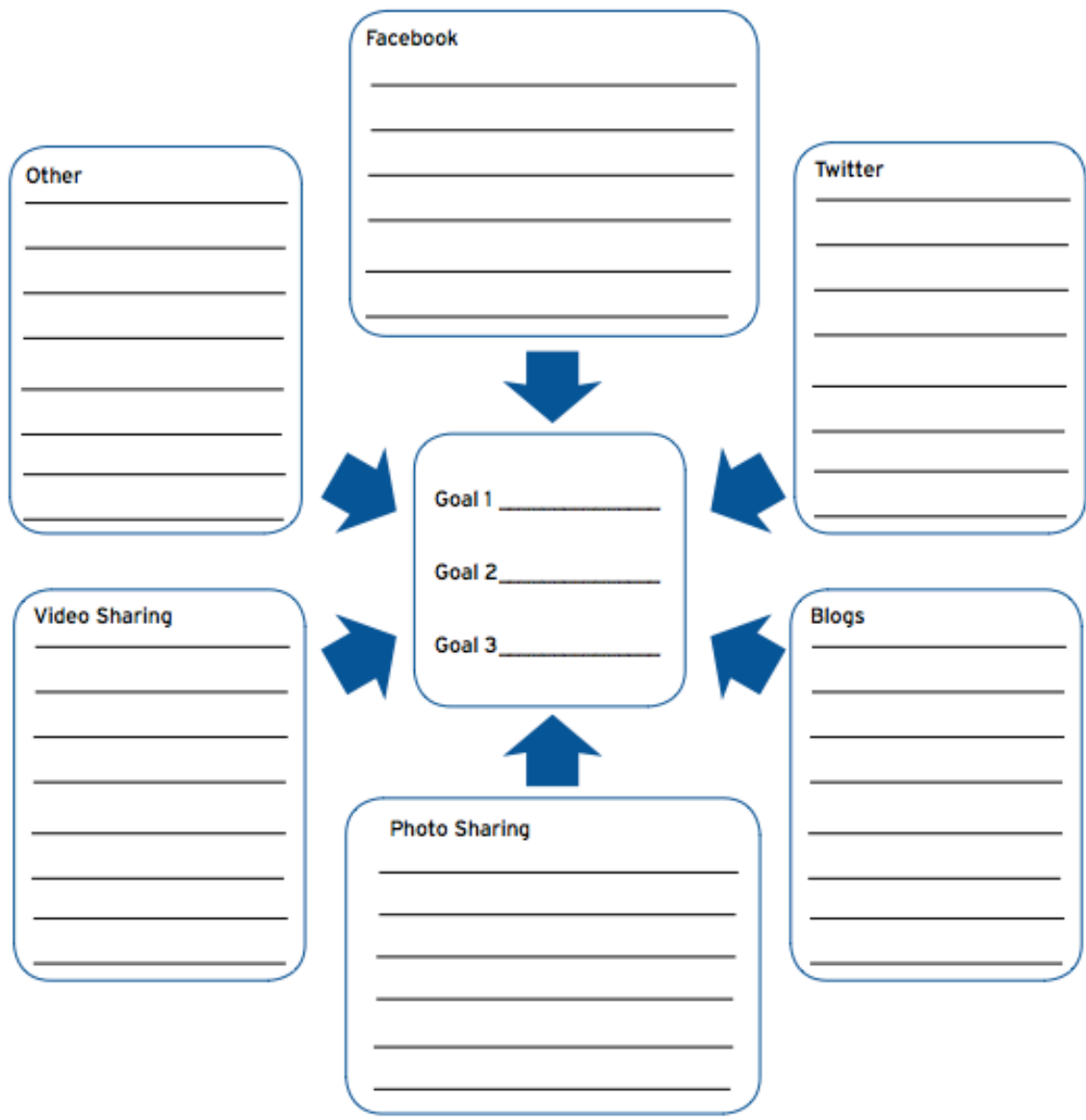
Other thoughts or comments?

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

## 6. BRAINSTORMING TOOL POSSIBILITIES

Each social media channel is good for something different. Consider the strengths and weaknesses of each tool against your goals in order to determine which channels are right for your organization.

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



## 7. DECIDING WHICH CHANNELS ARE RIGHT FOR YOU

Now that you know what each tool is good for, let's decide which are good for you.

First, consider how much time you can commit to social media channels. As a rule of thumb, estimate two hours per channel, per week.

$$\begin{array}{c} \text{Number of hours a} \\ \text{week you can commit} \\ \text{to social media} \\ \hline \end{array} \div 2 = \begin{array}{c} \text{Maximum number of} \\ \text{social media channels} \\ \text{you can take on} \\ \hline \end{array}$$

Now, write in your goals on the chart below, and rate each channel as to how well they're likely to help you meet them, on a scale of 1-5 (1=not very, 5=extremely). Also consider how easy it will be to create content, and how much experience you have with the channel.

	Goal #1: _____ _____ _____	Goal #2: _____ _____ _____	Goal #3: _____ _____ _____	Content: how easy will it be for you to produce the necessary content?	Expertise: how well versed are you or your staff in this channel?	Total	Rank
Facebook							
Twitter							
Blogs							
Video Sharing							
Photo Sharing							
Other							

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

\_\_\_\_\_

Look at the list of channels you came up with. At first glance, do they make sense? Do they resonate with you for your organization and its needs? If not, don't be afraid to tinker. This decision guide is just that—a guide. Ultimately, only you can decide which channels are best for your organization.

## 8. DEFINING CAMPAIGNS AND MAINTENANCE

As described in the Guide, we find it helpful to define a structure for the ebb and flow of social media by organizing your strategy into campaigns and maintenance periods, much like you would an email communications or direct mail process. Dividing your strategy into a series of campaigns and maintenance will help make the continuous nature of social media more manageable for you and your staff, and enable you to more effectively measure success toward your goals.

When developing your strategy think in terms of two types of periods: your campaigns, and the time in between where you work to maintain your network.



Your campaigns:

- Have a defined beginning and end
- Are targeted to reach specific goals
- May encompass more tools than you maintain on a regular basis
- Should have specific targets to determine success
- Should be evaluated for effectiveness, once completed, to help you learn what works

Your maintenance periods:

- Will not have a prescribed start and end date
- Are targeted to reach specific goals
- Define the baseline level of time your organization will need to devote to social media
- Help you maintain your followers and fan base between campaigns

The worksheet on the following page will help you develop your first campaign, and to determine what your channel maintenance will look like.

**Campaign**



**Campaign Plan**

Campaign \_\_\_\_\_

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

Goals \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Who is your target audience? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What tools will you use? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What will success look like? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

How will you measure success? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Maintenance Plan**

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

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

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

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

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

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

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

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

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

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

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

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

**Goals during maintenance**

1. To maintain and build audience for future campaigns

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

\_\_\_\_\_

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

\_\_\_\_\_

## 9. CREATING A SOCIAL MEDIA POLICY

Having a social media policy can help your staff understand when it's appropriate to get involved and what types of things are OK—or not—to post. This is a more-detailed topic than we can reasonably cover in a worksheet, but these questions will get you started thinking about your own social media policy.

1. Think through the policies for each channel you've decided to use.

Social media channel	Who on staff is in charge?	Who is allowed to post on behalf of your organization?	When is it appropriate to take down a comment or post by someone else (if applicable)?

2. Who is allowed to post or comment on behalf of your organization on social media channels (like a blog) belonging to other organizations or individuals? When is this appropriate?

3. What would **not** be appropriate for staff members to say about your organization on their personal social media sites, like a blog or Facebook?

For more information on social media policies, including a number of examples, see this great post from Beth Kanter of Beth's Blog about Social Media Policy: [http://beth.typepad.com/beths\\_blog/policy/](http://beth.typepad.com/beths_blog/policy/)

Adopted from 'The Nonprofit Social Media Decision Guide • July 2010; Idealware