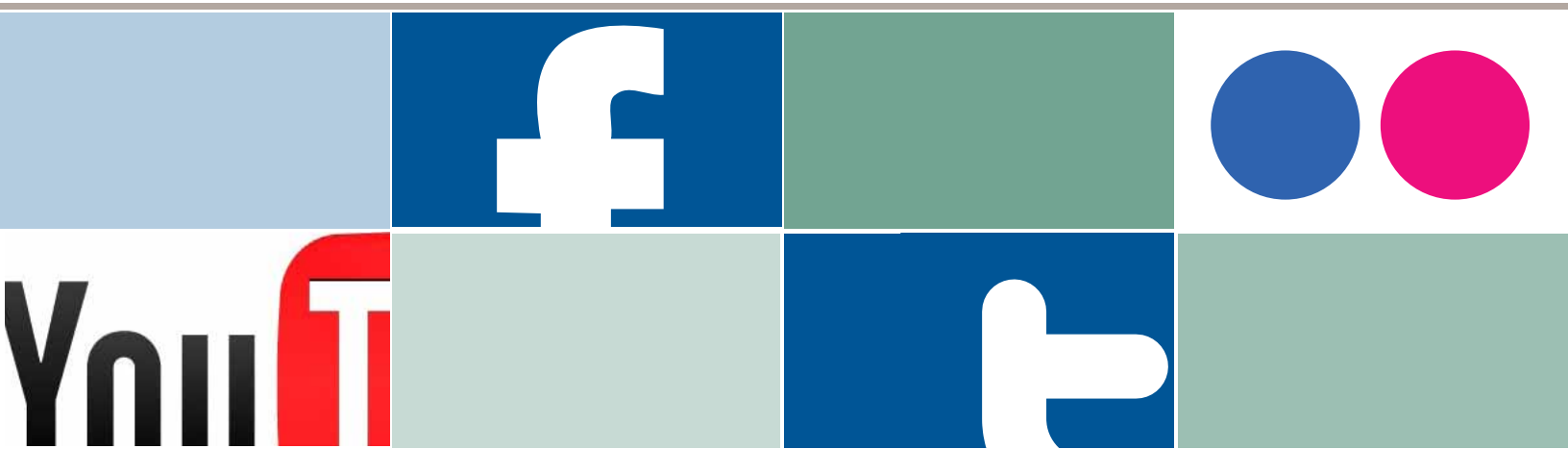




THE NONPROFIT SOCIAL MEDIA DECISION GUIDE



July 2010


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EXECUTIVE SUMMARY

Clearly, social media can be useful to nonprofits. The key question is, *how* useful? What can an organization reasonably expect in terms of results and benefits, and for what investment of time and effort? This Decision Guide helps answer those questions and more by walking you through a combination of information, research results and a workbook. All together, these resources will help you think through your own needs step-by-step.

“Social media” defines online media, like text, photos, messages or video, that is “social”—in other words, media that starts conversations, encourages people to pass it on to others, and finds ways to travel on its own. Why might it be useful to your organization? Quite simply, because other nonprofits are finding it to be an effective way to engage current supporters and reach new ones.

Like any marketing technique, different social media channels have different strengths, so it’s critical to define your goals and audience in order to see effective results. These channels are *tools*, not a finished product. A Facebook page shouldn’t be the end goal of a social media strategy any more than a telephone should be the end goal of a communications plan.

So what are the key differences between the channels? Through six months of research—including three surveys, a set of focus groups and a case study analysis—we were able to define some useful distinctions:

- **Facebook** allows you to set up a profile, and post updates, links, conversations, events, photos, videos, petitions, or even collect donations online. Users who choose to “like” your organization see updates without needing to navigate to your page, and can get involved in discussions with other supporters. It’s particularly good at increasing the level of feedback and discussion you have with supporters, driving traffic to your website, and

attracting people to specific events. It’s likely to take two-to-four hours a week to manage your Facebook account.

- **Twitter** lets you send out a stream of short messages called “tweets”—for instance, updates about what you’re doing, or links to resources of interest. People can choose to “follow” your tweets, and if they particularly like one they can “retweet” it (post it again so their own followers see it), potentially exponentially increasing your audience. People tend not to read tweets all the time, or to actually listen to everyone they’re officially “following” through Twitter, so it’s not necessarily a reliable method of reaching any one person. Think of it like a radio station—you’re broadcasting into the ether, and some people are listening, but it’s hard to know who. Twitter is particularly good for connecting with like-minded organizations and the media, asking questions, and providing very frequent updates. Expect to devote about two hours a week to manage a Twitter feed.
- **Blogs** are an online site where one or more people post fairly frequent updates about what’s going on in the organization, told from a personal perspective. They can be particularly useful to showcase your organization’s expertise (thus attracting press or clients), educating people on a particular topic, engaging people with stories of your work, or promoting resources on your website. While a number of organizations gain a lot of value from blogs, the vast majority of those included in our research were disappointed with the results they saw from their own. Expect a relatively skilled writer (or writers) to spend three to eight hours per week updating a blog, which means it’s not a given that you’ll get a good return on your time—especially if you don’t have specific expertise to showcase.

- **Photo Sharing Websites** like Flickr provide functionality to post and share photos on the web. Most organizations involved in our research were using these sites primarily in less “social” ways—for instance, to post pictures from an event, or share them with distributed staff members—but there are some interesting options for more collaborative uses. For instance, you could ask your supporters to post their own photos into your organization’s online photo gallery, or participate in group photo pools in your particular issue area. Maintaining a continuing presence on these sites is not as important as on many other social media sites, so you could potentially use them only for particular events or purposes. Posting photos is relatively quick—you could post 10 photos from an event in half an hour—but consistently maintaining a stream of photos to catch attention and build a particular group could take an hour a week or more.
- **Video Sharing Websites** like YouTube allow you to display and build community around your videos. As with photo sharing sites, the majority of organizations were using these sites primarily to easily upload and share videos rather than in more “social” ways. However, there are interesting social possibilities, such as encouraging conversation about videos, spreading your message widely through particularly compelling videos, or even asking supporters to submit their videos. The primary time consideration with these sites is the

time it takes to create the video itself. If you have one already, you can set up an account and upload it in less than an hour, but polished videos take days, weeks or even months to create.

And there’s even more options in social media. Some channels, like MySpace or SecondLife, are less likely to be useful to nonprofits. Others, like LinkedIn or niche social networking sites, can be very useful in reaching specific audiences. And then there’s newer channels like FourSquare that nonprofits are just starting to explore.

How do you choose what will work for you? Read on! Through information, research and worksheets, the guide helps you decide what channels are likely to be most effective based on your goals, audiences, staff time, what you have already, and your overall communications mix.

Whatever you choose, you’ll need to consider how to integrate the channels with your other communications in terms of tone, message, data and policies. The ideal is to create a strategy to reach as many segments of your audience as possible, attracting and engaging supporters, and keeping them interested and informed. Remember, social media is not just a means to distribute one-sided requests or missives. It’s a conversation, and if you want your supporters to hold up their side of it, be sure to hold up yours.

INTRODUCTION

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

At your organization, you may already have asked where tools like Facebook, Twitter, blogs and other social media channels fit within your long list of priorities. The Decision Guide is here to help with those questions, and more.

Information and worksheets will help you identify your goals and audiences. Hype-free overviews help you weigh the actual time and value of possible social media tactics and choose what makes sense for your organization. Summaries, research results and a workbook format help guide you through your own decision-making process to find the best solution for your needs.

So, what is social media? It’s a fuzzy term that a lot of people use to mean different things. We have a specific definition for it, though. At Idealware, we use it to define online media (like text, photos, messages or video) that is “social”—in other words, media that starts conversations, encourages people to pass it on to others, and finds ways to travel on its own. Simply posting something on a blog isn’t social media to us—when you encourage people to comment on it, link to it or respond on their own blogs, then it becomes social media.

Social media often has two aspects. First, there’s an important *listening* aspect that helps you hear what people are saying about you online—even if you don’t have a presence yourself. Tools like Google Alert and Twitter Search can be very helpful in finding mentions

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

1. Understanding Social Media
 2. Defining Your Goals and Audience
 3. Evaluating Specific Tools
 4. Choosing Your Communications Mix
 5. Integrating Your Communications Strategy
-

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

of your organization or issues that are important to you. Feed readers like Bloglines or Google Reader can help you pull all these mentions into a single interface. Listening is a great way to start in the world of social media and develop an understanding of how it all works.

But this report focuses on the second aspect: *hosting conversations*. Through tools like Facebook, Twitter or YouTube, you can post information, encourage comments and get feedback. Remember, however, the *social* aspect of social media. Simply putting up a Facebook page or sharing a video on YouTube isn't likely to do much good in a vacuum. It's important to think of these social media channels as *tools* to communicate in a social manner rather than the end in and of itself—in other words, social media is the journey, not the destination. A Facebook page shouldn't be the end goal of a social media strategy anymore than a telephone should be the end goal of a communications plan.

But what goals do social media techniques effectively support? Idealware has conducted more than six months of research to try to answer that question. What tools are working to what ends? With what effort? Throughout this guide, we've pulled out some

of the key data from our research into “What Did The Research Say?” sidebars, for those of you who want to dive into the details.

This isn't primarily a research report, though—instead, we're going to translate all of our research findings into actionable information to help you make the right decisions for your organization.

We'll start at a high-level by walking through the reasons social media is worth considering. Then we'll dive into a tool-by-tool look at what's available, how it's working for other nonprofits, and the core considerations for you to keep in mind. We'll wind up the text-heavy part of this report with a look at what it means to integrate a number of social media channels with each other—and with the other communication methods you're already using.

But we're not done there! In the second section of this guide you'll find a workbook, with worksheets and samples to help you figure out your own social media strategy.



THINK IT THROUGH

What assets and resources do you have that will help with your social media strategy? Start the workbook with [Worksheet 1: Self-Assessment](#)

Finally, at the back of the report you'll find a directory of consultants who can help you finalize and move forward with your plan. Although the consultants paid to be listed, we set the prices quite low—and on a sliding scale based on size—to provide you with options for consultants who can help organizations of any size.

By the time you finish, you'll have a good draft of a social media strategy in hand.

WHAT DID THE RESEARCH SAY?

Before we start talking about what the research **said**, we want to tell you what we **did**—specifically, the five separate research efforts we undertook to arrive at that information:

- **High-Level Survey:** First we conducted a high-level survey to understand, in general, how useful nonprofits already using social media found particular channels to be at meeting three goals: engaging supporters, reaching out and fundraising. The details results from the 460 nonprofit staff members who responded can be seen in our report **Using Social Media to Meet Nonprofit Goals: The Results of a Survey**.
- **Discussion Groups:** Then we undertook a series of six telephone focus groups comprised of nonprofit staff with considerable experience using social media for their organizations. In these discussion groups, we delved a little further into what people are doing and how well it's working. Seventeen people participated.
- **Case Study Analysis:** Next, we conducted a case study collection exercise in which 273 nonprofit staff members provided details of what social media channels they're using, who they are targeting, and what tangible results they're seeing.
- **Facebook Survey:** We also conducted a survey of 271 frequent Facebook users to understand how they might use Facebook to evaluate nonprofits for which they were considering volunteering.
- **Twitter Survey:** Finally, we surveyed 69 frequent Twitter users to understand how—and if—they use Twitter to discover and take action with nonprofits.

WHY SOCIAL MEDIA?

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

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

You should at least be able to define why social media doesn't make sense for you at the moment.

We're not going to say you *need* to be using social media—only you know your organization well enough to decide that. In fact, if you feel like you're not yet on a steady course with stable computers for staff members, a solid website, a usable way to track constituents, and a good broadcast email strategy,

your organization might get more bang for the buck by concentrating on those areas instead. Don't abandon proven strategies like direct mail and broadcast email—social media complements them, rather than replacing them.

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

Our case study analysis results support the idea that a number of nonprofits are finding at least some tangible success with social media. More than half of those investing time in these tools saw real results beyond simple fans or followers, like an increase in website traffic, substantive feedback or new volun-

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

teers. (On the other hand, 19 percent felt they had not gotten any tangible results for their efforts.)

All our research to date has shown that social media is not a great tool for direct fundraising, however. Individuals may have some success with fundraising from their own friends and family, but it's better to think of it as a way to engage and communicate with people than to ask them directly for support. Orga-

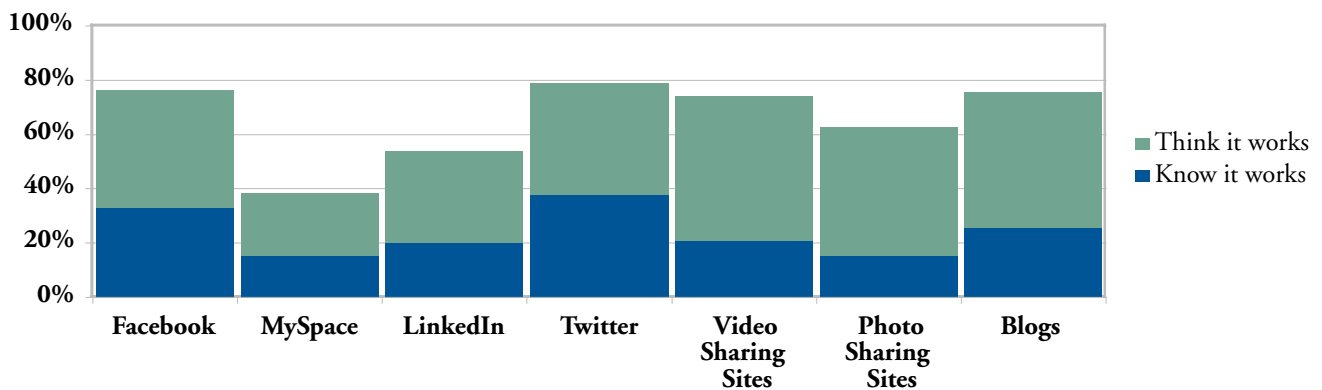
nizations are more likely to be successful thinking of social media as a way to distribute messages and start conversations.

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

WHAT DID THE RESEARCH SAY?

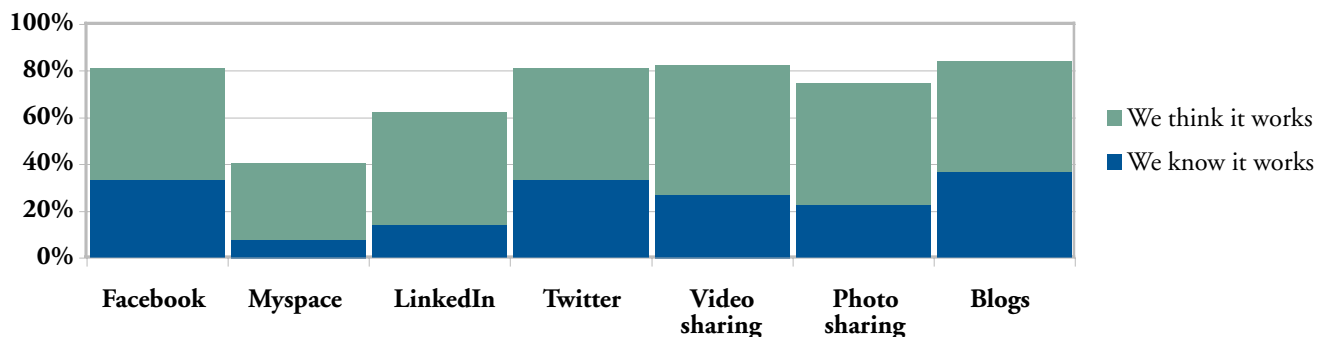
As reported in our **Social Media Benefits Survey**, nonprofits using social media found many specific channels useful for reaching out to new constituents (note that the percentages are of those actually using the channel).

Reaching New Supporters For Your Organization



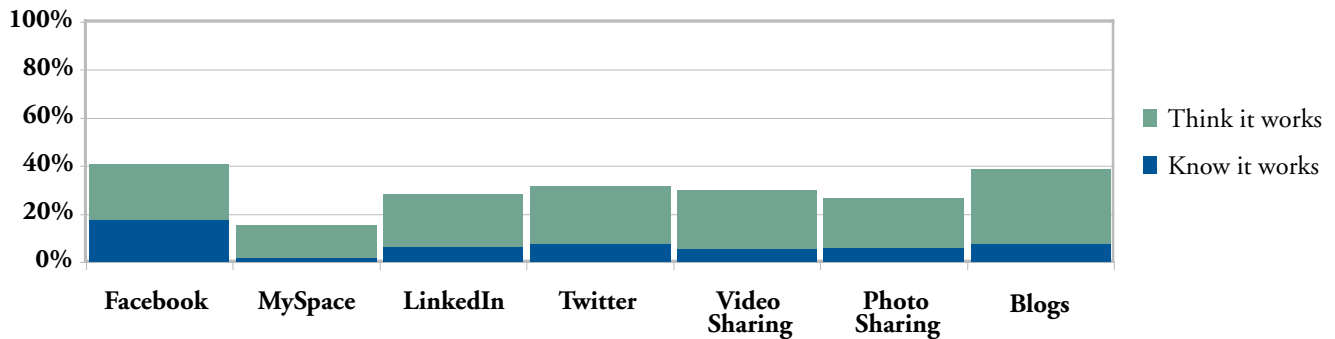
The results were similar when we asked about enhancing relationships with their existing audiences:

Enhancing Relations with Your Audience



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

Raising Money For Your Organization



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

What, exactly, were these organizations successful in doing? Here's what they said when we asked them about their tangible results (note that they answered a free-form question about their results, which we then grouped into the following categories):

Drive traffic to website	21%
Substantive feedback and discussions	20%
Attract specific new constituents (i.e. volunteers, members, event attendees, advocates)	16%
Build email list	9%
Attract partners, sales or clients	7%
Attract donations	6%
Get press coverage	2%

DEFINING GOALS, MEASURES AND AUDIENCES

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

The more specific the better—many organizations enter the world of social media with goals like “building awareness” or “spreading the word” that are too nebulous to measure. If can't measure it, it's impossible to know if it's working, if it's worth your time, or what you can do to improve it.



THINK IT THROUGH

What are you trying to accomplish? Use **Worksheet 2: Identifying Your Social Media Goals** to think through your goals

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

- **Views:** Through measures like the page views on a blog or your Facebook views, you can see just how many people you're reaching, which can be useful if your primary goal is to spread a message—for instance, which people should get a flu shot. However, to inspire people to do more than read your information, don't get too caught up in views. Expanding your audience is great, but if none of these people chooses to follow your information, engage with you or act to help your organization, then increasing your reach may not be useful to the organization as whole.
- **Followers:** By looking at the number of Twitter followers, people who “like” your Facebook page or those who subscribe by RSS to your blog, you can see the size of your supporter base. It's also the number of people you're able to reliably get in touch with in order to spread a message or ask for help. Just as with views, it's all too easy to look at your number of followers as an end in and of itself rather than a means to reach

your goals. Does it matter if you have a million Facebook fans if none of them ever does anything to help you?

- **Engagement:** It's often useful to get people involved—not just reading and following, but actually commenting on your blog, posting on your Facebook page, and retweeting on Twitter. Counting the people who actively participate on one of your online channels confirms that you're saying the types of things people want to hear, and effectively encouraging them to be more involved. If engagement itself is a core goal—for example, to get youth talking about sexual health, or to give homebound people a creative outlet—then these metrics provide a great way to track your progress. But if you're focused on other actions that directly help your organization, like volunteers, event attendees or donations, then the conversion metrics outlined below will provide the core information to know if you're succeeding.
- **Conversion:** Do your online communications help create real world results? Conversion metrics help you measure actual, tangible outcomes for your organization, like donations, number of volunteers or event attendees. How do you count the impact of social media on such things? You could ask people where they heard about the opportunity, or attach online source codes so you can tell where someone came from to donate or register. Marketers often fall back on a method called “lift” to try to indirectly measure conversion—if you leave a gap between communications, you can roughly tie the results you see to the communication you just put out.

Fundamentally, you want to define conversion metrics whenever possible to try to measure the actual impact your social media work has on your organization.



THINK IT THROUGH

How will you define success? Use **Worksheet 3: Measuring Your Goals** to think through what metrics make sense.

As you consider your goals and measurement, it can be useful to think about social media as a series of campaigns and maintenance periods. Sometimes you should have very specific goals—say, recruiting 10 new youth volunteers in two months, or hitting 1,000 views of your educational resource by October. Other times, you won't have a specific campaign, but you shouldn't simply stop—instead, make sure you're maintaining your relationship with the people who are using those channels. However, if you don't have any specific goals at all, then simply maintaining the channel for the sake of maintaining it is not likely to be a smart use of your time.

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

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



THINK IT THROUGH

Who are you trying to reach...and what do those audiences want from you in terms of social media? Use [Worksheet 4: Defining Your Audience](#) and [Worksheet 5: A Sample Audience Survey](#) to think it through.

WHAT DID THE RESEARCH SAY?

Facebook and Twitter are the most widely used social media channels, and thus the ones people tend to think about most in terms of demographics. To help, here's some recent demographic information on these two channels:

Age Group	Twitter	Facebook
12 to 17	18%	10%
18 to 24	11%	25%
25 to 34	33%	25%
35 to 44	19%	17%
45 to 54	12%	12%
55+	7%	11%

Gender	Twitter	Facebook
Female	53%	56%
Male	47%	44%

To translate, about 60 percent of both Facebook and Twitter users are under 35. Within this age group, Facebook tends to skew younger, toward the 18-to 24-year olds, while Twitter users are more likely to be 25 to 34. Note, of course, that this also means that 40 percent of the users of both tools are over 34, which means they are not just tools for the young.

In terms of gender, both Twitter and Facebook are more likely to be used by women—but Facebook a little bit more so.

(Facebook demographics are as of July 2010 from Facebook's own tools for analyzing ad markets. Twitter demographics are from Edison Research's Twitter Usage In America study, which involved a telephone survey of 1,753 Americans in February 2010. For more information on Edison's study, see www.edisonresearch.com/twitter_usage_2010.php)

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

FACEBOOK

Facebook seems to be all the rage these days. As more people use the site to stay in touch with one another, nonprofits are launching Facebook Fan Pages to reach supporters using the site. But like any online communications method, Facebook takes time to use effectively (about two-to-four hours a week, in fact, but more on that later). Is it worth your time? How much of it? Those aren't easy questions to answer.

First off, a quick description of Facebook for those unfamiliar with it. The widely used site (according to company statistics, 200 million different people log in to Facebook *each day*) helps people keep in touch with extended groups of friends and family. Each person creates and maintains a profile, and can post updates—including photos or videos—of what

they're doing or thinking. Their Facebook "friends," or people in their network, automatically see those updates and can comment on them, making for a great way to keep up with friends without much effort.

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

An example of the main page of the World Wildlife Fund Facebook Fan Page. Note that there's a little bit of information about WWF on this page (and more if you click on the Info tab), but the primary focus is on updates posted by WWF, the comments people have about the organization, and the people who've said they "liked" WWF. The tabs along the top allow people to access photos, events, videos and more.

The screenshot shows the World Wildlife Fund (WWF) Facebook page. At the top, there's a navigation bar with tabs for Wall, Info, Photos, Events, Get Involved, and YouTube. Below this, there are three main sections of posts:

- Post 1:** "World Wildlife Fund Oil spill disaster in the Gulf - is the Arctic Ocean next? Urge the Obama Administration to stop Shell from drilling in the Beaufort and Chukchi Seas, which could begin as early as July!" It includes a link to "U.S. Activists: Help Save America's Arctic from an Oil Spill Disaster" and shows 132 likes and 37 comments.
- Post 2:** "World Wildlife Fund Hope for the future: Rare photo of a pregnant Sumatran Rhino!" It features a photo of a rhino and a link to "Update - Rare Photo of Pregnant Sumatran Rhino" on the WWF website. It shows 634 likes and 56 comments.
- Post 3:** "World Wildlife Fund Did you know that dogs are using their keen sense of smell to join the fight to save wild tigers? WWF experts have teamed up with highly trained sniffer dogs to track tigers in Cambodia! Check out the story, photos and video in the link below." It includes a link to "WWF - Update - Dogs Join the Fight to Save Wild Tigers" and shows 10 likes and 1 comment.

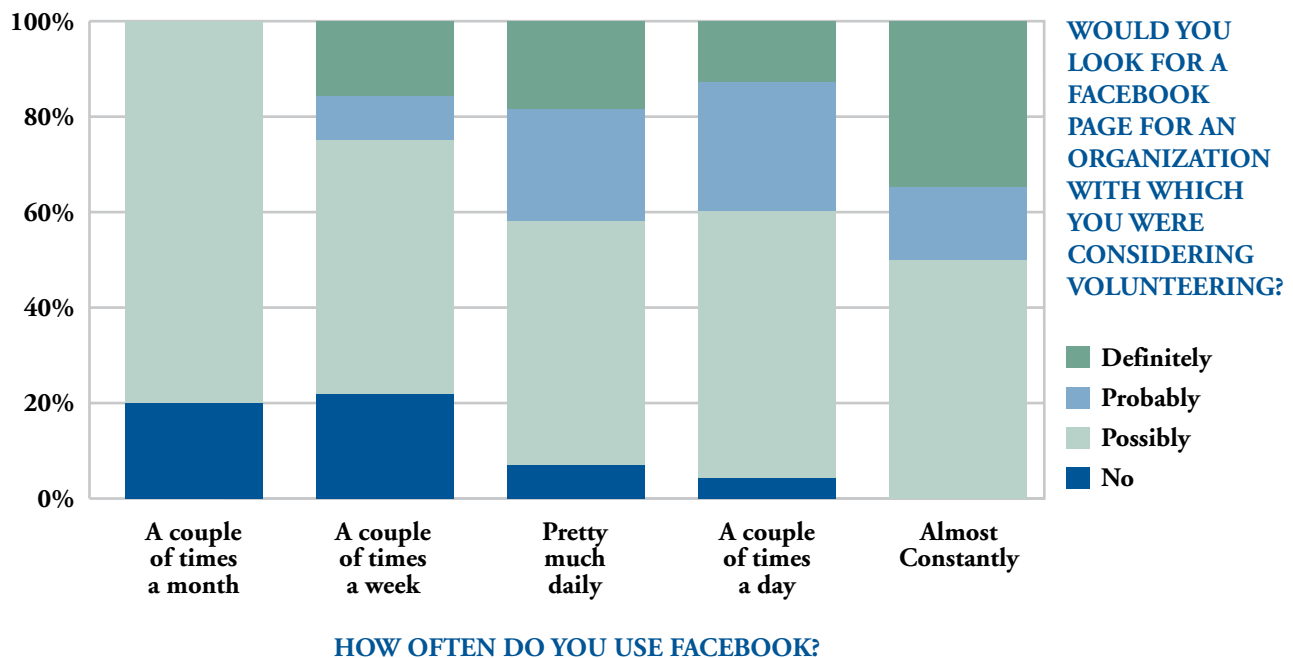
On the left side of the page, there's a profile section for WWF, including the logo, "Add to My Page's Favorites", "Suggest to Friends", and "World Wildlife Fund (United States) - Protecting the future of nature for almost 50 years." Below that, there's an "Information" section showing "Founded: 1961". Further down, there's a "1 Friend Likes This" section with a photo of Jonathon Colman. At the bottom, there's a "332,201 People Like This" section with a grid of profile pictures of people who have liked the page.

WHAT DID THE RESEARCH SAY?

Facebook has the potential to be an important part of your online presence. In our survey of 271 Facebook users, 38 percent said they would **definitely** or **probably** look for a Facebook page for an organization with which they were considering volunteering. This climbs to 43 percent for respondents who said they use Facebook daily.

Of the same Facebook users, 85 percent said they'd **definitely** look for a nonprofit's website. This number is much higher than those that

“Websites and Facebook pages help me decide beforehand if the organization and I are a good fit.”



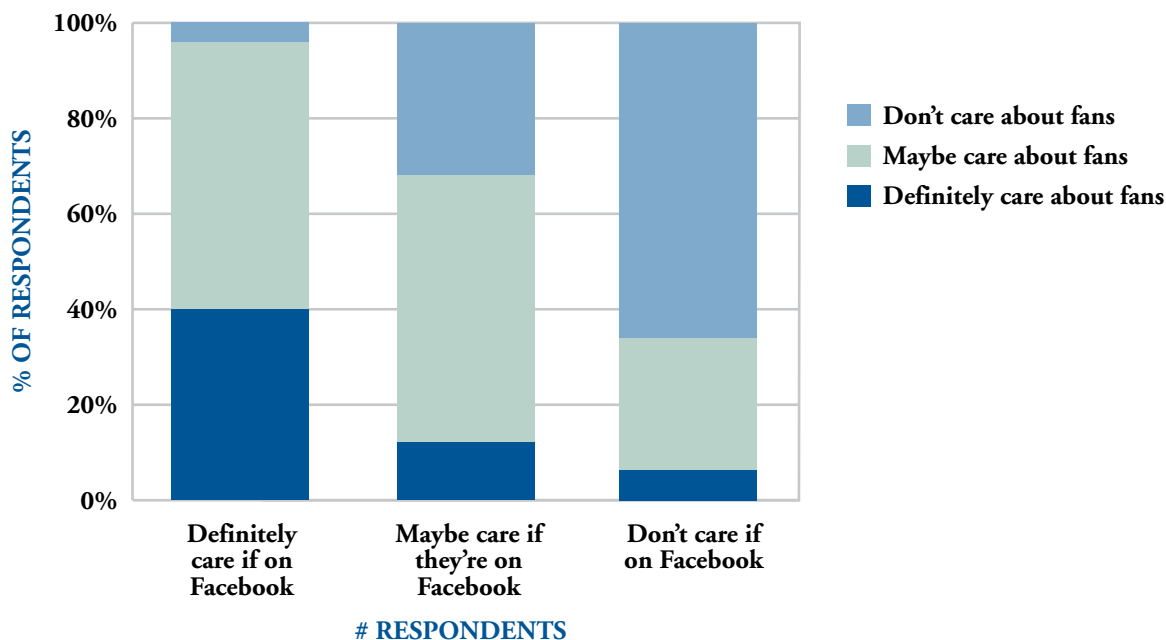
would rely on Facebook, meaning the site is still not considered nearly the go-to information source that a web page is. However, that doesn't diminish the fact that you could be losing potential volunteers who look for a Facebook page and don't find one.

“If my Facebook friends were volunteering, it would make a great deal of difference.”

In fact, 12 percent said they'd **definitely** be more likely to volunteer with a nonprofit that has a Facebook page (they'd "be concerned" if it did not), and 43 percent said a Facebook page **might** have an impact on their decision.

It gets more interesting from there. Nine percent said they'd be concerned about volunteering for a nonprofit that didn't have "a lot of friends/

fans” on Facebook, while 43 percent said that **might** make a difference in their decision-making. And in fact, these aren't the same people who care if you're using Facebook at all. A notable percentage (31 percent) of the people who said they don't care if you're using Facebook say they might be moved to volunteer if you have a lot of fans—and 12 percent of that group say they would be concerned if you didn't.



What does this data mean? Facebook users may be more likely to get involved with your organization if you have a Facebook page. However, a page without a credible number of fans might be worse than no page at all. How many is credible? Our research doesn't shed any light there, but we would suspect it depends on the size of the organization.

What Specific Outcomes Are People Seeing From Facebook?

As the research shows, Facebook—perhaps alone among the social media channels in this guide—is worth thinking about for the sole reason of having a presence there. Heavy users, already a growing segment of the population, turn to Facebook as a reference site—almost like they would a website. It's worth creating a page simply to ensure that people looking for you can find you. That said, a page with a lot of fans seems considerably more effective, and it's worth devoting staff time to managing and maintaining the page to maximize its effectiveness.

Organizations using Facebook report that it's been useful to them in the following ways:

- **Increased feedback and discussion.** One of the most frequently cited benefits of Facebook is real feedback from constituents, and the ability to foster useful discussions... if you're able to engage constituents in the first place. Hearing what's important and of interest to your supporters is a valuable thing, and not to be taken lightly.
- **Driving traffic to your website—and spreading information.** There's no doubt that effectively using Facebook encourages people to view more resources on your website, and presumably

to see the resources you post there. Organizations are seeing a substantial amount of website traffic coming directly from Facebook. In fact, in our research a number of people mentioned that they were getting more traffic from Facebook than any other source.

- **Building an email list.** While our research shows you can't depend on it as much as feedback or website traffic, a number of people reported that they were able to encourage Facebook supporters to join their email list. This would typically be done either by linking them over to your website to join, or through the use of the Facebook Causes application.
- **Attracting event attendees.** Facebook has reasonably strong event features, and a number of organizations said they were successfully using the site to attract people to events. It can be a particularly useful way to encourage supporters to pass the word about events on to their own friends.
- **Getting people to take action.** A small but significant number of people are using Facebook to attract advocates and volunteers—especially youth volunteers. While many organizations are seeing that people are considerably more likely to take action on emails or direct mail than Facebook, a post to an existing Facebook page can be an easy way to gain a few more calls to Congress, or a few more postcards sent. Facebook users are also more likely to take action *on Facebook*—for instance, asking people to change their photo to a message representing your cause, or to post about your issue on a corporation's wall.
- **Attracting donations.** Through both our high-level survey and our case study analysis, Facebook proved to be the channel for which people reported the most fundraising success—however, that success was not overwhelming. Most who have successfully used Facebook as a fundraising technique either use it as just one of many communication methods (like supplementing a direct mail and email campaign), or do very personal campaigns—for example, the Facebook “birthday” campaign, where users ask folks to donate to a cause in support of their own birthdays, is a well-established technique that can often raise a

“We have so many more alumni and friends interacting via Facebook and leaving comments. So much more than any mail campaign or our website.”

few hundred dollars. It makes sense to think of Facebook more as a platform for friends to ask other friends for money than as a place for the organization itself to solicit donations.

What Resources Are Required?

Facebook itself is free for any organization to use. The only resource involved is staff time—which isn't to be taken lightly. It's a complex site for those unfamiliar with it. Creating a Fan Page might take some online research and experimentation. Plan for about eight-to-16 hours upfront to understand what's possible on Facebook, define a strategy for your organization, and launch a fan page.

Once you're up and running, try to engage people with your page. Start with outreach to current supporters and staff members' Facebook friends to encourage people to “like” your fan page. At the same time, though, make sure you post interesting updates (for instance, what's happening at the organization, interesting items from the news, new photos, events, questions or conversation starters) so there's something to see on your page when people visit.

Once you've gotten the page up and running, how much time should you plan to spend updating your page? The average organization we surveyed spent about two-and-a-half-hours a week managing its Facebook site (though a few spent considerably

more). This includes posting updates, answering questions, and doing additional outreach. Those who had seen substantial success with Facebook accounts (for instance, attracting new volunteers, event attendees, substantial website traffic) averaged three and a half hours per week, although it's not clear if the extra time contributed to their success or they devoted more time because it's more successful.

“We’ve had an easier time recruiting volunteers via Facebook. We’ve recruited roughly 15-25 new volunteers we can draw on.”

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

Getting Started with Facebook

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

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

As you get up and running, plan out the first few weeks of posts, and decide how you'll get people to interact—maybe even going so far as to ask close friends of the organization to actively reply to your initial posts to show a sense of community. Actively seek out and “like” partner organizations and friends; many will “like” you back. Once you've established some supporters and written a few posts, the hope is that you'll start to reach your friends' friends—and then you can start to implement tactics to meet your particular goals.



THINK IT THROUGH

How could Facebook be useful for your organization's goals? Start Worksheet 6: Brainstorming Tool Possibilities by filling out the Facebook section.

TWITTER

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

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

and outgoing tweets.

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

You can also use "hashtags" (the # symbol, known as "pound," "hash," or the number sign) to precede a keyword to try to reach a certain group. For instance, including the #nptech tag will flag your post as relating to nonprofit technology and make it more likely to be seen by those following #nptech tweets.

A lot of people use Twitter (more than 100 million as of April 2010), but it's a relatively specific group—older than typically uses Facebook, and comparatively media- and technology-savvy. Twitter's probably not the right channel to reach your college leadership

The United Nations Refugee Agency's Twitter feed. You can see where the agency has retweeted other peoples' posts (with the abbreviation RT) and used hashtags like #refugees and #Kyrgyzstan to spread its messages.

The screenshot shows the Twitter profile for the United Nations Refugee Agency (UNHCR). The profile name is "Refugees" and it is a verified account. The bio states: "The official twitter account of UNHCR. Follow us as we provide vital aid and protection to the forcibly displaced around the world." The account has 33,509 following and 1,168,761 followers. The main content area displays several tweets, including one from FatihUNHCR about refugees in Chad, a tweet from melissarfleming about UNHCR HC Guterres at a border crossing, a retweet from @melissarfleming about a meeting with the Kyrgyzstan President, a photo of a mother and child at a health clinic, a tweet about UNHCR's work with NGOs, and a tweet from SybellaWilkes about 375,000 displaced people in Kyrgyzstan.

group, but it's an interesting way to reach media, partners and skilled potential volunteers.

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

"Twitter has been extremely helpful for cultivating connections with trainers, business collaborators and the media."

broadcast often enough, most people who care will hear you sooner or later.

As discouraging as this sounds, nonprofits are nonetheless finding Twitter useful—interestingly, though, in different areas than other social media channels:

- **Connecting with like-minded organizations.** Seven percent of Twitter users in our case study analysis mentioned they've had success connecting to partners and other organizations in the same space. This doesn't sound like a large number, but it's particularly notable as nonprofits don't often think of partnerships as an outcome—when a number mention partnerships unsolicited, it implies that they've not only con-

nected with organizations, but found substantial value in doing so.

- **Connecting with the media.** A lot of reporters and media professionals use Twitter, making connecting with them an interesting strategy. Posting about talks and resources on target issues can showcase your expertise, making you a possible source for a story. Following relevant hashtags can also let you jump in to answer a question in your area of expertise, which often are posted by reporters.
- **Asking questions.** It's surprisingly easy to entice Twitter followers to respond, at least compared to Facebook users or blog readers. Posting questions to which you actually want to know the answer (as opposed to just conversation starters) can sometimes generate useful answers.
- **Engaging people with frequent updates.** Of all the social media channels covered in this guide, Twitter is the one to which it's most reasonable to make frequent posts. People expect posts at least once or twice a day, but you can easily post five or more without raising eyebrows. This can be useful in the lead-up to an event—for example, you could post that you're about to pick up the keynote speaker, or that the venue looks good, you could post an interesting tidbit the keynote speaker had to say before the event, share a quote from an excited attendee, or post that you're printing out the programs, that tickets are still available, or more. Each post should reinforce the message that you're hosting an exciting event, and that people should come.
- **Providing near-real-time updates.** If you're following something—like an issue, current event, conference or rally—in close-to-real time, Twitter can provide a venue to post updates that go out instantaneously to your followers. In the right circumstances, this could be a real service to an interested group.
- **Coordinating a group in real time.** Because Twitter integrates so well with cell phones, it can also be a great way to coordinate a group that isn't all co-located—for instance, at a rally, or when coordinating a simultaneous action in different parts of the country. It also easily supports decentralized communication. Your group can all

follow a particular hashtag, like #myrally, and see anything posted by group members that includes that keyword.

What Resources Are Required?

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

Facebook, or a month of blogging.

That's not to say you can afford to not post regularly. Make sure you leave yourself time to read other people's tweets as well, to learn what people with similar interests are saying. It's good practice to make sure you re-tweet other people's posts, and to make sure at least half your posts are not self-promotional—followers will become less interested if you're not holding up your end of the conversation. And re-tweeting is actually a quick way to provide valuable resources to your network.

WHAT DID THE RESEARCH SAY?

Like for Facebook, we surveyed frequent Twitter users to find out why they use it, and how they think about nonprofits using it. This was a small, informal survey of a fairly specific group, with 69 respondents from our own Twitter community and email list. Almost all were nonprofit staff members, and about half worked with technology for a living (not surprisingly, this quite accurately describes the profile of Idealware's Twitter followers). Based on this survey, we can't assume the data would be true for all Twitter users—but it seems a safe bet that these people are more likely to be more interested in hearing about what's going on with nonprofits and more likely to get involved than a more general population.

Why were these people using Twitter? The data is pretty much as you would expect—to learn about new resources or keep up with specific issues, to post about what they're doing, or to market themselves, and often, all of the above.

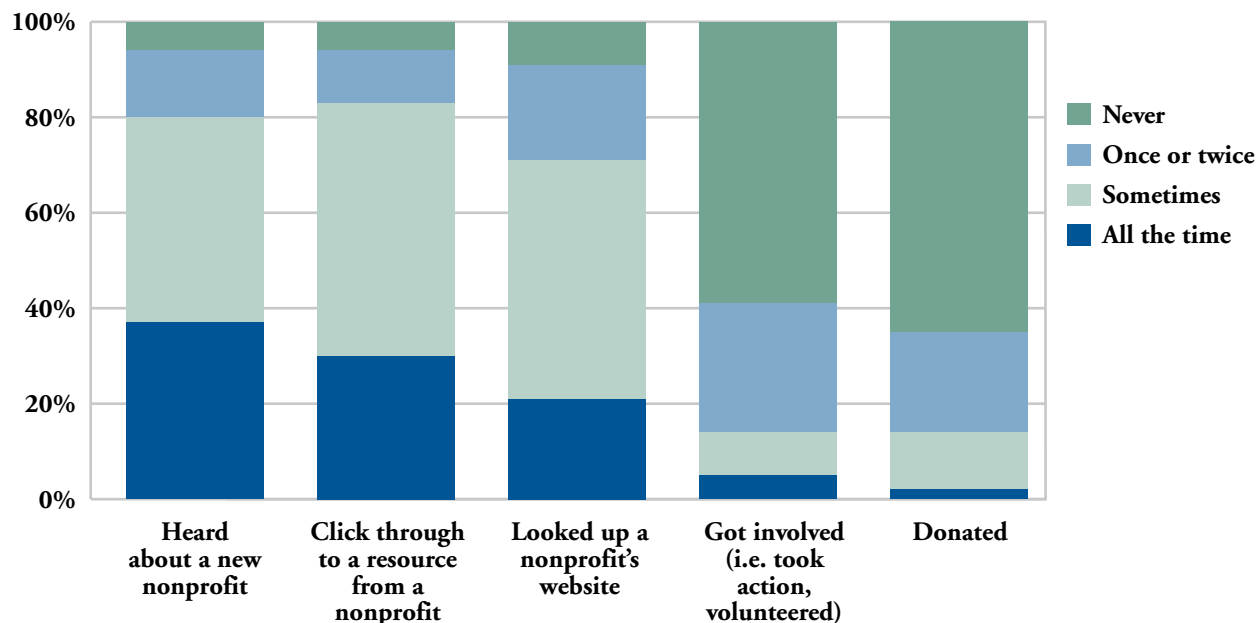
For what reason(s) are you using Twitter?	%
To learn about new resources	62%
To post about what I'm doing	62%
To keep up with a particular issue area	59%
To market a specific service or cause	52%
To keep up with a particular group of people	47%
Because I'm curious about what Twitter's about	18%
Because a lot of other people are	11%
For entertainment	5%

“Twitter has been effective as a way for us to ‘listen’ in the overall nonprofit space.”

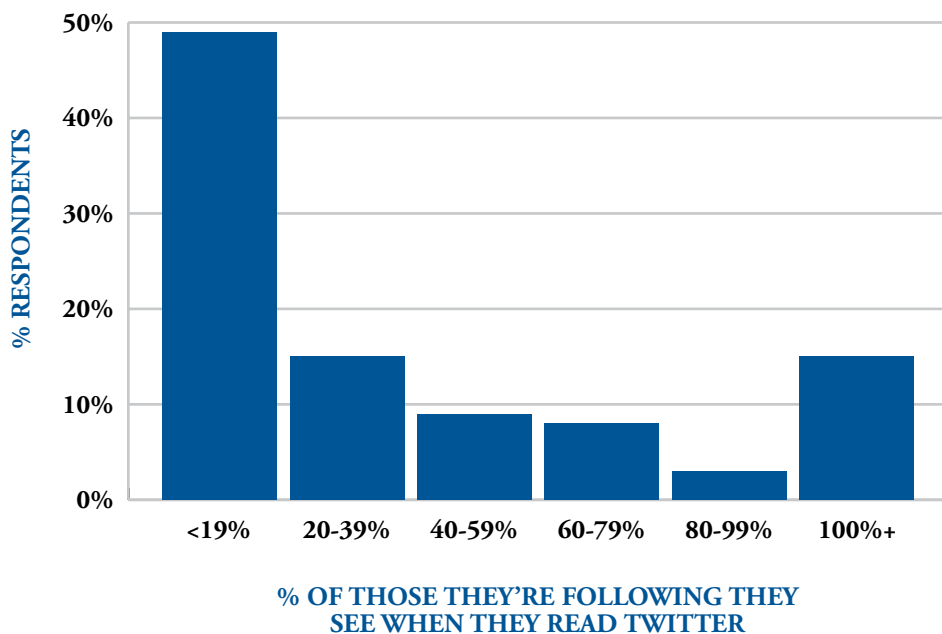
We also asked how often they found information or took action about nonprofit causes based on Twitter alone. The data in this area was very clear—this set of users is hearing about nonprofits and clicking through to their websites to learn more. However, these people are also less likely to get involved by volunteering, taking action or donating. It seems clear that Twitter could be a way to get people's attention, but it's not a reliable way to inspire people to act.

Finally, we asked how many people they were actually listening to—how many users' tweets they were

actually reading rather than just following. The numbers were stunning—nearly half were listening to less than 20 percent of those they were officially following. (In fact, 16 percent were listening to less than 10 percent of the people they were officially following, and 11 percent were listening to less than 5 percent.) Few people fell within the middle ranges—for example, only 35 percent of respondents were listening to more than 20 percent but less than 100 percent of those they were following, but a notable chunk—15 percent—was listening to 100 percent or more (you can read tweets from people you’re not following through searches or lists).



What does this mean to nonprofits? Just because people are following you, it doesn't mean they're actually paying attention to what you're saying. The only way to measure that is to look at how many people click on links, retweet your posts, or take action.



Getting Started with Twitter

As we said, posting to Twitter can be like posting into the ether—so how do you get anyone to even know you’re saying anything? First, set up your account—which is as easy as creating a user profile—and post a few interesting tweets just to have something visible when people start to check you out. Then, find and follow a number of people in your topic area and community—there’s a strong Twitter ethic of following the people who follow you, so you can start to build a following that way. However, as the research shows, only some of those who follow you are likely to actually listen.

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

“I often will search for tweets on a particular topic. More useful than following folks.”

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



THINK IT THROUGH

How could Twitter be useful for your organization’s goals? Continue Worksheet 6: Brainstorming Tool Possibilities by filling out the Twitter section.

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

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

“The most exciting time on our blog is during the camp weeks! Then, multiple teachers are posting, multiple times a day! We try to give readers a feel of what it is like to be there.”

The Consumers Union uses its “Hear Us Now” blog to educate, promote and engage people in talking about their issue—consumer choice in telecommunications. It also shows their expertise in the area, perhaps attracting press questions or interviews.



“While people tended to lurk more than comment, there was also quite a lot of off-blog communication—for example, a journalist would get in touch to get more information.”

Blogs are useful in a few key areas:

- **Publicizing your expertise.** If you have one or more experts on a topic (for instance, your child safety organization has several folks who are knowledgeable about hazards for kids), asking them to blog or even ghost-writing blog posts for them can increase their public stature, leading to more partnerships, press or paid work, if that’s part of your model. It can also be a good way to disseminate their knowledge to your audience. Blog posts tend to be easy to find via search engines, and encourage discussion and dissemination among communities interested in your issue.
- **Promoting your cause or educating people.** Similarly, if part of your mission is to educate or inform, a blog is a useful and straightforward way to spread that information. It’s generally less time-consuming to write blog posts than articles or reports. They’re less formal, and the personal tone often makes it easier for people to relate.
- **Telling stories about your day-to-day work.** Storytelling is a critical part of engaging and stewarding constituents. A blog can be a useful part of that. Imagine staff members or volunteers in the field telling stories of the day-to-day people and issues they encounter, and what they do to help—maybe even including photos or videos.

These entries become a good way to connect supporters to your cause, and a useful source of stories for other publications, like newsletters or annual reports.

- **Engaging people in your decisions, or your work.** A blog can be a forum to engage constituents in a real way—to ask questions, get their feedback, and ask them to help you workshop your ideas. However, this is a lot easier said than done. Many more blog readers will lurk than will post comments, so you need a fairly high readership and some pretty engaging topics to get them to actually participate.
- **Promoting your website and online information.** Because blogs are great for search engine optimization, people can easily find your organization using search engines. And because they tend to generate lots of content, people can find your organization (and hopefully your website, if you link to it from your blog) using lots of different searches, gaining a wider audience for your website.

“One of our blog posts on ‘what makes a good site visit’ saw immediate results—the next few site visits we did with grantees were much better.”

In short, blogs can be helpful if you have staff members or volunteers who can eloquently—and relatively frequently—advocate for your cause, tell stories about how you’re serving your mission on a day to day basis, or engage people. However, not that many nonprofits have experts or advocates on the front lines who are also good writers, so the blog becomes one more thing for a communications team

(or person) to manage.

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

What Resources Are Required?

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

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

If you start having significant traffic, you'll also need to put some energy into monitoring and moderating comments to catch both the irrelevant and the inappropriate. More-popular blogs tend to attract

substantial irrelevant comments aimed at promoting products. Some are obvious Spam and can generally be automatically filtered; others are actually posted by people and will need to be moderated or deleted manually. You should also have a policy to determine when comments cross the line, and how to react, though most blogs have considerably more trouble getting anyone at all to comment than with negative or inflammatory comments.

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

WHAT DID THE RESEARCH SAY?

Blogs are commonly used by nonprofits, but many of our research participants were disappointed by their results. Between the discussion groups and our case study analysis, 14 people shared information about what they were doing with their blog and how it was working; of them, just two organizations seemed happy with the way their blog was going. One of those had invested substantial training and resources to support 42 fellows blogging from around the world. The other had a very specific goal of spreading health-related information for education purposes.

In general, these 14 respondents reported that they received fewer comments than they would like. Six reported that they received no comments at all, while five said they received only occasional comments. The other six didn't mention comments, and one said their blogs generated "a lot" of discussion.

At least a few nonprofit blogs (for example, many of the Consumers Union blogs like <http://www.hearusnow.org/blog.html>, or The Uniform Project <http://theuniformprojectblog.com/>) are highly successful in fostering discussions and meeting organizational goals, so we don't interpret this research to mean that blogs aren't useful for nonprofits. Rather, it implies that perhaps they're used too often by organizations who don't have the appropriate goals or resources for them to make sense. Simply establishing a blog will not ensure discussion and engagement.

“Each of these other bloggers only posts every six weeks, so each person spends one-to-two hours every six weeks. You’d think I was asking for the world—I get a lot of complaints that this is too much time/energy/work. But they keep doing it.”

Getting Started with a Blog

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



THINK IT THROUGH

How could blogs be useful for your organization’s goals? Continue Worksheet 6: Brainstorming Tool Possibilities by filling out the Blogs section.

PHOTO SHARING WEBSITES

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

“Photos do drive people to the website—‘Click here for photos of XYZ’ continues to be the most clicked-on item in any e-mail we send.”

However, most of the nonprofits we spoke to in our research use such sites primarily for internal or straightforward communications purposes. Because these sites make it easy to post digital photos online, they're handy for sharing pictures among geographically distributed staff, or posting pictures from an event or the field for constituents to view. Even better, most of these sites make it easy to pull the images into your website, blog or Facebook page—for instance, your website's "Events" page could automatically pull three random photos out of your event photos on Flickr to show each visitor.

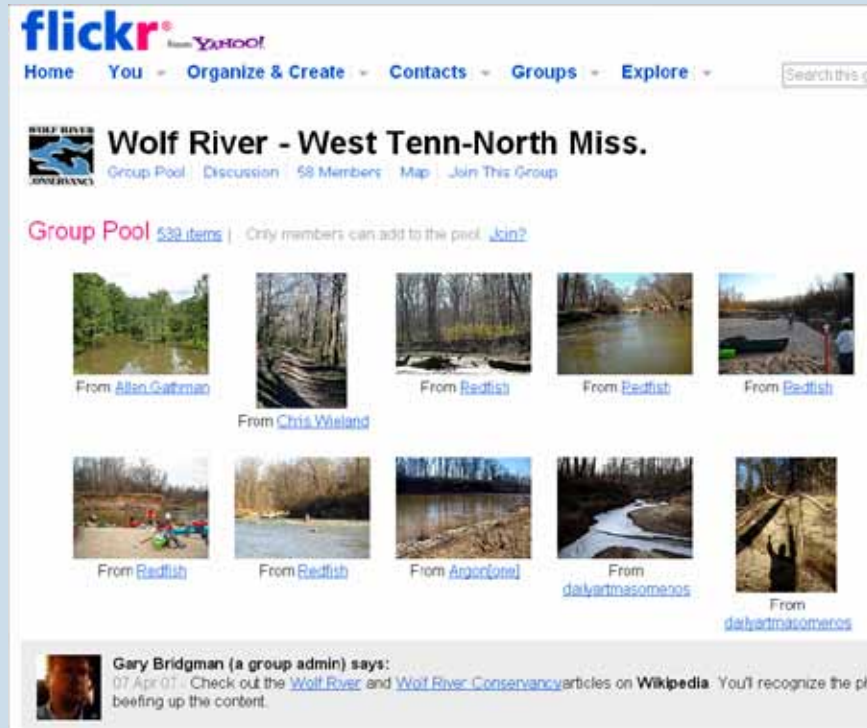
Some nonprofits are also experimenting with using these sites in more "social" ways that better meet our definition of social media—for instance, for collaboration and community building. Many sites let constituents comment on photos (though in our research several organizations mentioned that people are more likely to comment on a photo on a Facebook page than on a site like Flickr). "Tagging" photos—associating keywords or keyword phrases with them—is another useful way to let people outside the organization easily find or submit photos.

Other ways to use photo sharing sites include:

- **Getting (and displaying) photos from a distributed group.** The ease of posting photos tagged with particular keywords makes it easy to ask constituents to post their own pictures. If they tag it with the keyword you define (i.e. XYZConf2010 for your conference), everyone can see them in one place. You could even create an automatic photo gallery on your website, which pulls in the pictures as soon as they're posted—and maybe turn it into a contest and give a prize for the best photo. If you plan to reuse the pictures, be sure to get permission from the photographer in advance.
- **Participating in group photo pools.** Some sites like Flickr have a number of cause-related groups where people share pictures. For instance, if you search for "water quality," you find dozens of groups focused on everything from the pollution of a local river to global water issues. Looking at new pictures as they're posted to the group, post-

“On a few occasions, I've had enough time to search tags and find photos associated with us but posted by a constituent. It has been a great way to strike up a conversation or manage our reputation.”

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



ing your own photos, or commenting on existing photos can all lead to discovering new potential partners and supporters, as well as photos to use in your own materials (with permission, of course).

- **Finding people posting pictures of you.** If you work for a larger or geographically-distributed organization, you might have fans out there posting pictures of your work or events you're not aware of. Searching for keywords that include your organization name can be a useful way to meet new people, or see what people are saying about you.

What about privacy and security issues? There are two sides to that question. You should certainly be concerned about the privacy of the people in photos you post, and should keep it in mind when choosing photos. Are you sure the subjects would like their friends (or employer, or grandmother) to see the pictures? You might want to get permission before tagging photos with people's names just to be safe.

On the flip side, what about people stealing *your* pictures? In theory, you control the rights to photos you post online—people aren't legally able to use them just because you posted them, unless you make

them specifically available for public use. However, it's difficult to prevent people from downloading and using your photos unless you very actively search for people using them, or purchase expensive technologies to help you track them.

What Resources are Required?

The photo sharing sites are free to use—obviously, you'll need some photos, but once you have them it only takes a few minutes to post them. Maintaining a continuing presence on these sites is not as important as on many other social media sites, so you could potentially use them only for particular events or purposes. For that reason it's difficult to assess the amount of time required. You could post 10 photos from an event in half an hour, but consistently keeping up a stream of photos to catch attention and build a particular group could take an hour a week or more. Plan your time based on your specific use of these sites.

Getting Started with Photo Sharing Sites

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



THINK IT THROUGH

How could photo sharing sites be useful for your organization's goals? Continue Worksheet 6: Brainstorming Tool Possibilities by filling out the Photo Sharing section.

WHAT DID THE RESEARCH SAY?

In our high-level survey, 36 percent of respondents said they were using photo sharing sites. But far fewer—just 8 percent—mentioned them in our discussion groups or case study analysis when asked about which social media channels they were using. To us, this sizable difference implies that only a small number of respondents think of these sites as an important social media channel—a theory supported by the fact that respondents who **do** use the sites use them primarily to post photos online.

All seven people who provided details about what they were doing with these sites were using them to post pictures online to share with supporters, either on the photo sharing site itself, or to be pulled into their organization's website or blog. Two said they used tags or groups to encourage people to find the pictures. One said they used Flickr to gather photos from their supporters, which were then reposted on the organization's blog

VIDEO SHARING SITES

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

“For donors who are interested in learning more about what we do, these video stories are invaluable as a means of communicating the success of our programs.”

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

Videos also have interesting potential as social media, though. For instance:

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

“Our YouTube videos feature excerpts from our performances... Our choir loves to email them to friends and relatives and add the videos to their personal Facebook accounts, especially when trying to get friends to come to a concert.”

Witness, a nonprofit that focuses on using video to expose human rights violation, has a robust YouTube channel. Note the link to donate shown on top of their featured video, a feature provided to nonprofits with the nonprofit version of YouTube. Viewers can comment on the video below its description.



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

- **Asking constituents to vote your videos up.** On a related note, you could also ask supporters to “vote your videos” up on a site like YouTube. Those that are viewed and liked by a lot of people are more likely to be shown on category pages, or even the homepage, creating more views—and potentially even more visibility.
- **Asking supporters to provide videos.** As video cameras and editing software become more and more affordable, it’s possible your supporters have the tools and interest to create videos themselves. Perhaps they’re willing to send in their videos to build a repository about your cause.
- **Hosting a video channel.** If you have access to a lot of video, or interest in compiling video about your issues, it’s possible to create a “channel” of videos. Channels feature videos you

choose grouped together on one page. Typically you keep them updated over time to feature the latest videos related to your topic, so be sure to put time aside to find and include new videos.

What Resources are Required?

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

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

Keep in mind, of course, that this doesn’t include creating the videos themselves. Making watchable videos require at least a basic set of skills, and editing

them can be much more time-consuming than you think. It's possible for someone with video experience to whip together a short, informal video in an hour or so, but polished videos often take days, if not weeks, to create. Developing and executing a concept that both entertains and educates, as is often desirable for a viral video, could take months.

Getting Started with Video Sharing Sites

Like photo sharing sites, you can use a video hosting website simply to put up videos when you have them—or, to create a “channel” over time. Creating an account is easy regardless of the site—for YouTube, which is owned by Google, you simply need a Google account. Then, upload video up to 10 minutes in length. Most modern video cameras and editing equipment will export in a format that can be

uploaded to YouTube, but if you have trouble, the site offers extensive help. If you have a lot of videos, or want to showcase others, consider creating your own channel.

Google also provides a non-competitive grant program to let most nonprofits access additional YouTube features, like the ability to upload longer videos, to overlay links on top of videos (like a call to action for people to donate), or to be listed on the Nonprofits page. It's an easy grant to apply for, but it can take months to hear back.



THINK IT THROUGH

How could video sharing sites be useful for your organization's goals? Continue Worksheet 6: Brainstorming Tool Possibilities by filling out the Video Sharing section.

WHAT DID THE RESEARCH SAY?

In our high-level survey, 49 percent of social media users said they were using video sharing websites; 16 percent of the respondents in our case study analysis brought up videos as part of their social media strategy. As with photo sharing sites, this discrepancy suggests more people are using video sharing sites in rudimentary ways than just those who use them as an important part of their social media strategy.

Of the 12 people who contributed detailed case studies about video sharing, the majority were using it primarily to upload and host videos they hoped would engage their current constituents. Eight were posting videos on YouTube and then sending out links to lists. Many were also specifically hoping to reach out to more people through YouTube; six mentioned outreach as a goal. Two said they were having substantial success, and getting a lot of views of their videos.

This made up the bulk of the use—just four people mentioned doing anything else with YouTube. Two said they used videos to educate staff or advocates, and one mentioned gathering video submissions from grantees to promote their work.

Several commented on the unreliable quality of comments on YouTube, but one of the larger organizations said it had more luck generating discussion of its issue on YouTube than any other social media channel.

ADDITIONAL SOCIAL MEDIA CHANNELS

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

How do you keep up with what's available and what's changing? Try to keep an eye on the strategies used by large nonprofits, and those covered in the nonprofit press. Wait to see what's working for others before diving in, unless you have a pressing need that can only be filled by a new tool.

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

LinkedIn

LinkedIn is an interesting site that falls somewhere between social networking for the general public and the niche social networking sites described later. Targeted at professionals interested in professional networking, it's likely to be of particular interest to groups whose mission is to support people in their jobs (like an association of nonprofit executive directors, for instance) or who have a focus on networking, specifically in particular groups (like a “young professionals” group).

A LinkedIn profile is essentially a resume. People describe their work history and skills, and can include educational background, references, associations, and more. Each person can link their profile to other people they know—when you link to people you see their profiles and the entire list of people they know. This provides an interesting way to look for connections to people your organization might want to meet.

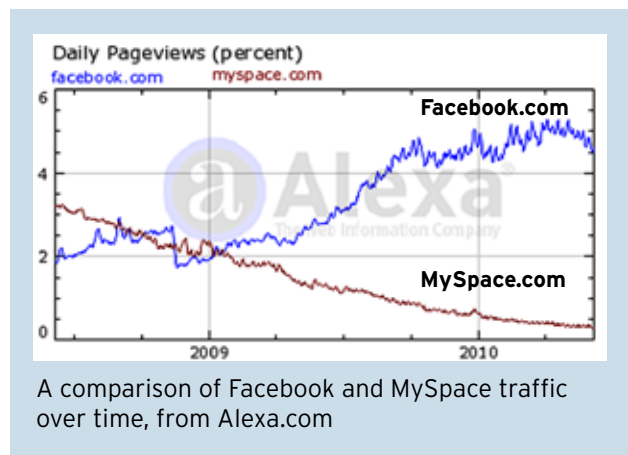
As an organization, you can create a LinkedIn group for people to join. Hosts or members can hold discussions, post resources of interest, or create a job board. Members can also ask questions posed not only to group members, but to their contacts as well, essentially tapping into an extended network of people.

You can also see all the LinkedIn contacts for each of your group members, making it straightforward—if time-consuming—to look through each person's connections to see if there's anyone to whom you'd like an introduction.

MySpace

MySpace was designed to be a general interest social networking site, similar to Facebook. As recently as June 2008, the two were running neck to neck in terms of usage numbers. Since then, however, Facebook has seen a huge boom in popularity, and MySpace a substantial decline. Our research shows that not many organizations are currently investing much time in it, and are seeing decreasing benefits.

However, MySpace has a large emphasis on music and musicians, and today can essentially be considered a niche social media site (see next section) with a music focus. Historically, it was also more likely to be used in minority communities, and by those with less education. While usage has dropped even among those demographics, it's worth checking whether you might still use it to reach a very specific group of people. Usage is in small demographic pockets—for instance, all the kids at a certain high school might use MySpace, while those at another all use Facebook.



A comparison of Facebook and MySpace traffic over time, from Alexa.com

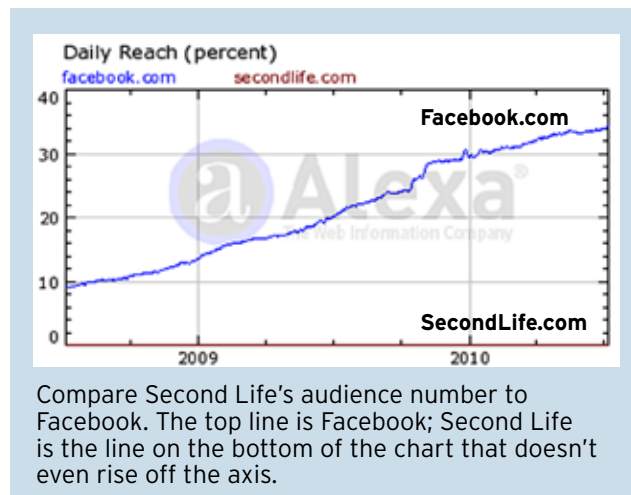
Niche Social Networking Sites

Facebook and Twitter attract huge general audiences. Your organization, on the other hand, may instead want to reach a niche group with a specific set of interests. It's worth taking a look at the world of niche social networking sites—and there are hundreds to choose from, from BlackPlanet (targeted at African-Americans) to Fuzzster (for pet lovers) to The Boaters (for boat lovers). You can find a useful list of niche social networking sites at <http://socialmediaanswers.com/niche-social-networking-sites/>.

These sites vary widely in functionality, but they all let you read posts that show what people in the community are thinking about, pose questions and make comments. For most of these sites, it's worth considering a presence that continues over time rather than just swooping in suddenly to post about your event or fundraising drive. Think of them as conversation channels, like Facebook or Twitter, and put aside at least an hour per week per social network to actually read some of what's posted and have a conversation with the community. Otherwise, you risk losing audience—or not attracting it in the first place.

Second Life

Several years ago the “virtual reality” space Second Life generated a lot of talk. However, we don't recommend Second Life for nonprofits, except for large organizations with significant social media experience and a high degree of tolerance for experimenting with things that might not work. This online site lets users create virtual representations of themselves, known as avatars, and navigate through a virtual world that can include “buildings” created by businesses, nonprofits and individuals. Large organizations have experimented with Second Life for virtual meetings and outreach to audience members who are using the service, but it's time-consuming to set up, and is only used by a fraction of the people using Facebook or even MySpace.



Compare Second Life's audience number to Facebook. The top line is Facebook; Second Life is the line on the bottom of the chart that doesn't even rise off the axis.

FourSquare

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

FourSquare is new, and is only now becoming known within a more mass-market audience. Organizations are still experimenting to see how—and whether—it can be useful, but it has some interesting applications for nonprofits with a significant geographic presence. You add your venue into the application, and people “check-in” via their phone when they arrive—FourSquare then tells their friends where they are, usually via their mobile phone, spreading the word. The person who checks into your venue most frequently becomes known as the “mayor” in FourSquare, providing additional incentive for people to check in.

Nonprofits are just beginning to use it—for an example, FourSquare shares an interesting case study of the Brooklyn Museum's use on its site at <http://aboutfoursquare.com/brooklyn-museum-shows-the-possibilities-of-foursquares-api/>. Additional possible uses include offering discounts to the current “mayor” of your venue, or to all who “check-in” during a specific time frame, or showing photos of everyone who checks in on your website.

In general, the benefit is that getting people to check in could boost attendance and awareness among their followers, increasing your own audience.

Custom Communities

Lots of nonprofits think creating a custom community—for example, setting up an email discussion list with a tool like Google Groups or Collective X's Groupsite, or a custom social networking site through a site like Ning or Elgg—is a good idea, but far fewer ever succeed in actually fostering a useful community. Such communities can be useful to encourage conversation and share among people already committed to your organization or cause, engaging them further and shepherding them toward more and more involvement. But getting them started? Therein lies the challenge. Few people get excited about joining yet another online community.

If you choose to go this route, start by making sure you have a committed group of people who really want to talk to each other online. You should be able to name 10-20 people you know will participate—in fact, it might be worth talking to each of them individually to ask them to make a special effort to participate as you're starting up. More people are likely to participate via an email discussion list than an online network (often, even if they say the opposite)

so a discussion list can be an easier way to test the waters.

Make sure someone is in charge of the community. Who will define the ground rules? Who will ask provocative questions, and email people directly to solicit posts? A custom community will need substantial care and maintenance—perhaps eight hours a week for a number of weeks to get a medium-sized community off the ground. The early stages are critical in trying to build a self-sustaining community. If it becomes clear early on that very few people are participating, it can be difficult to get them to come back and give it another chance.



THINK IT THROUGH

It's time to make some decisions! Go to [Worksheet 7: Deciding What Channels are Right for You](#) to think through what social media tools are likely to best support your goals.

CHOOSING A SOCIAL MEDIA COMMUNICATIONS MIX

There are a lot of specific social media tools. When considering them, it's important to think of your communications mix at its highest level. Choosing social media tools isn't an either/or situation—should I use Twitter, or a blog?—but a question of finding the right mix of channels for your needs. Clearly, you can't plan social media communications in a vacuum—you need to integrate with the other types of communications you're doing, such as direct mail, email, phone calls, and person-to-person events and meetings.

It's far better to use one or two channels well than many channels poorly.

It's critical to have a good, integrated strategy that defines what tools to use for specific needs, and how often they're implemented or updated. Don't think about each channel as a willy-nilly venue for saying whatever comes into your mind, but as part of an overall communications strategy. All your communications should help you to paddle in the same direction.

The idea of integrating all these things may sound overwhelming. It doesn't have to be. The key is to focus on your audience and your goals—ideally, divide your work into specific “campaigns” that take place over a finite period of time, potentially with periods of “maintenance” between, to keep your channels active and community engaged. For instance, perhaps you have a volunteer recruitment campaign

that takes place over three months and uses a number of different communication channels. Your need for volunteers may not end in three months, but the fixed time frame helps you set priorities and timing, and gives you an obvious time to check in to see how your tactics are working.

In order to figure out the ideal mix that makes the best use of your time, devote some thought to three variables: staff time, existing resources, and overall timing.

Staff Time

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

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

As a rule of thumb, set aside at least two hours each week for each social media channel.

WHAT DID THE RESEARCH SAY?

Devoting time to social media does not necessarily guarantee success, but not putting in enough time almost guarantees failure. In our case study analysis, not a single one of the 36 respondents who said they were spending less than an hour a week on social media felt they were seeing results—in fact, 56 percent of them said they were not.

On the other hand, the 75 respondents who were seeing tangible, substantive success with social media averaged about five hours a week working with it—essentially, an hour a day. However, almost 30 percent of these 75 achieved success putting in two hours a week or less. You'll need to work smart to see that kind of return on your time, but it shows that you don't need a full time staff member or an entire weekday dedicated to social media to see results.

Of course, how much time you spend depends on how many channels you're using. On average, the 75 organizations most successful with social media used two to three channels, and spent about an average of two hours per week on each.

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

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

What You Have Already

The best way to maximize your staff time is to take advantage of your existing resources and skills. For example, if you don't have any video, video sharing sites are going to require a large investment, as you'll need to create the videos first. On the other hand, if you have a staff full of writers, creating a blog seems a natural step.

Don't disregard the advantage of having staff members who are really excited about trying a particular method—particularly if they have experience with it (either personal or professional). If your Communications Assistant is a committed Facebook user who really wants to manage your organization's Facebook presence, weigh that into your decision-making.

Don't disregard the advantage of having staff members who are excited about trying a particular method—particularly if they have experience with it.

Timing

Different communications tools work in different timeframes. For example, it's not practical to send out more than a few direct mail pieces over the course of a year, while email is more of a monthly or weekly communication stream. Facebook or blogs are weekly, or a couple of times a week, but you can easily post to Twitter several times a day.

Photo and video sites, on the other hand, are not particularly timing-specific—if you wanted to, you could post weekly or more frequently, but you could also simply post photos or videos when you have

them.

Depending on your campaign, you might want to choose a mix of channels that are relatively similar in timing, or one that uses channels with completely different time frames. For instance, if you have just a week to get 10,000 signatures on a petition, direct mail isn't likely to be useful, but Twitter and Facebook could be your best friends. On the other hand, if you're looking to encourage people to attend your conference in two months, channels with different timing could reinforce each other—for example, you could send out

Remember that the channels that allow you to post frequently generally come with the expectation that you will post frequently.

an introductory direct mail, follow it up with several emails spaced out over that time period, create a blog focusing on all the great content and speakers, and use Twitter to try to get the word out to folks in the topic area (and potentially get some press).

Remember, however, that the channels that **allow** you to post frequently generally come with the expectation that you **will** post frequently—it's not enough to post to Twitter several times a day in the heat of a campaign, abandon it for months, and then pick it up again the next time you need it. That's not how people use Twitter, and they may well stop following you. The same is true of Facebook or blogs—it's important to establish a baseline frequency (close to what people would expect) and stick with it.



THINK IT THROUGH

What tools should you use in your first campaign—and then how will you maintain them? Think it through with [Worksheet 8: Defining Campaigns and Maintenance](#)

INTEGRATING YOUR COMMUNICATIONS

We wouldn't expect you to use all of the communications channels we've mentioned in this report, but you might well choose to use a few—and you likely already have some existing communication methods like direct mail, email or advertisements that you wouldn't want to leave behind.

How do you effectively integrate your communications across all your channels? There are three main components:

Integrating Your Message

If you're communicating through multiple channels in a fairly close timeframe, it's important to coordinate them. For instance, if you're doing a direct mail campaign, it makes sense to mention it—and to potentially have substantial tie-ins, with frequent updates or additional stories—on your social media channels. Make sure that it seems like the people in charge of different channels are talking to each other.

On the other hand, the messages shouldn't be identical. Technically, it's possible to blast out a message to many social media channels at the same time, but that's almost always a bad idea. The platforms are different enough that you should think about the audience and the expectations for each, and tailor the message. For instance, Twitter posts need to be fewer than 140 characters, but a Facebook post could be longer, and can include a link with a picture, and a blog post could provide considerably more backstory.

Integrating Your Channels

Think through ways to draw constituents from one channel to another, and make all your channels feel like a cohesive whole. For instance, it's a straightforward process to add a link to your Facebook account from your website, or even to automatically pull your Facebook posts into a webpage. Pulling a rotating set

of photos from Flickr into your website can also add life to your site and integrate the channels. Or, you can put links to your social media channels at the bottom of broadcast emails. If you have an email discussion list, that's an engaged group already—a great place to talk up and link to other channels, or to use as a starter group for a photo or video experiment.

Integrating Your Data

Chances are, you're already tracking your constituents in some kind of database—a donor management system, membership database, constituent relationship management system or something similar. Wouldn't it be nice to be able to tell by looking at your database whether someone is also following you on Twitter, or has subscribed to your blog?

We know it would. Unfortunately, it's not possible—at least not easily. The only one of the tools we've discussed here which provides any help with data integration is the Causes application in Facebook. Causes helps you collect email addresses and download them in a format that can be merged into other databases. To track other people, like Twitter followers, Facebook fans, or people who have commented on your blog or posted pictures on Flickr, you would need to go through the list one by one, see if you can figure out who they are based on profile information (which may or may not even include their actual name), and mark them by hand in your database. Like we said, it's not really practical—unless you have a lot of folks with time on their hands.

Pulling it Together

Creating a social media policy can be a useful tool in planning out exactly how you'll integrate these tools with your existing communications. This type of policy typically defines your organization's guidelines

for social media use and makes them clear to employees. For instance, who on staff is empowered to communicate through which channels? To respond to comments or questions online? Who needs to be involved in posting something to Facebook or the blog? When is it appropriate to delete a comment or a post? Can your supporters change your logo when they create resources to support your work?



THINK IT THROUGH

Work on your own social media guidelines using Worksheet 9: Creating a Social Media Policy

Conclusion

Regardless of the channels you choose, or your organization's mission, when planning a communications strategy, your goal is the same—use the channels that best fit your needs and resources in a way that helps you fulfill your mission. For example, choosing a channel with a lot of potential doesn't make any

sense if you don't have the resources to devote to it. Similarly, spending a lot of staff time on a channel that doesn't reach your organization's audience, or result in any tangible outcomes, is a misguided use of resources.

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

Whichever channels you choose, integrate them with your existing channels to create a cohesive whole—a strategy to reach as many segments of your audience as possible, attracting and engaging supporters and keeping them interested and informed. Remember, social media is not just a means to distribute one-sided requests or missives. It's a conversation, and if you want your supporters to hold up their side of it, be sure to hold up yours.

RESEARCH METHODOLOGY

The information throughout this report was based on five different research initiatives spanning six months. This section includes a high-level look at our methodology for each of these initiatives—more detailed information about the research instruments and demographics of each group of research participants is available upon request.

High-Level Survey

In November 2009, Idealware conducted an online survey of staff members at nonprofits that were already using social media channels, asking them about their experience with the tools. In addition to demographic data, respondents were asked about their reasons for using social media, the goals they were trying to reach with social media, and the perceived effectiveness of using social media channels for specific goals. The specified channels were: Facebook, MySpace, LinkedIn, Twitter, video-sharing sites, photo-sharing sites and blogs. (See our separate report *Using Social Media to Meet Nonprofit Goals: The Results of a Survey* for the full survey questionnaire).

The survey invitation was sent to Idealware's distribution list of approximately 10,000 people, posted on Idealware's Twitter account, on Idealware's Facebook account, and to the Progressive Exchange and NTEN Discuss email discussion lists. It's difficult to judge how many people saw an invitation to take the survey, especially as some people passed it on to others, but we estimate that perhaps 15,000 saw the invitation.

The survey invitation specifically requested that staff members from nonprofits using social media take the survey. A total of 459 people took the survey—as only some of the people who saw the invitation were actually within the target audience (staff members with nonprofits that were using social media), it's difficult to judge a response rate. However, it's likely that only a small percentage of those who saw an invitation responded.

The 459 respondents showed a reasonable distribution across different nonprofit sizes and types. (See our

separate report *Using Social Media to Meet Nonprofit Goals: The Results of a Survey* for more detailed information on the respondent demographics).

This survey was not intended to be representative of the nonprofit sector at large, but rather to gather information from an informal sample of nonprofits already using or interested in social media. While there's no way to assess how representative our sample is of the entire realm of nonprofits using social media, we have no reason to believe it is substantively biased in any one direction.

Focus Groups

Based on those who filled out the high-level survey, we recruited 17 people with significant experience using several different social media channels to participate in a series of telephone focus groups. We recruited staff across a range of different budget levels and mission focus areas, but the group was not specifically representative of the nonprofit sector as a whole.

We divided the participants into four segments, and conducted two telephone focus groups with each, separated by about a month. One of the focus groups was cancelled due to lack of participants, giving us a total of seven sessions.

The first set, conducted in January 2010, focused on what social media tools each organization was using, what their goals were and what they had found to be successful. The second set, in February 2010, focused on what techniques they had found effective specifically for engaging their current constituents, reaching out to new supporters and fundraising.

The data from these sessions was coded and analyzed along with the Case Study Analysis data.

Case Study Analysis

In April 2010, Idealware invited people to fill out what we called a *Survey to Share Your Social Media Stories*. The invitation was distributed in the same way as the high-level

survey (to Idealware's distribution list, via Twitter and Facebook, and via the Progressive Exchange and NTEN Discuss email discussion lists). The invitation encouraged staff members of nonprofits to take the survey to talk about what they were doing with social media, even if they were having no success or couldn't tell.

When they clicked on the link in the invitation, they were taken to a SurveyMonkey survey which asked a number of open-ended questions about what they were doing with social media, how much time they were spending, their goals and audiences, and whether they'd seen tangible success beyond results in the tool itself.

A total of 273 nonprofit staff members responded. The research instrument was unusual for an online research technique, and we got several emails implying that people felt it was a badly written survey. That and the fact that responding involved a significant amount of writing likely lowered our response rate.

As per the high-level survey, it's difficult to judge how many qualified respondents saw an invitation to take the survey, but we estimate that about 15,000 saw it, with only a small percentage responding. As such, this data cannot be assumed to be representative of the sector as a whole, but we have no reason to believe it is substantively biased in any one direction.

We followed up via email with 70 of the respondents to gather more information in areas that were not widely discussed in the original case studies (success in outreach to youth, and use of photo-sharing sites, video-sharing sites and blogs). A total of 44 people responded to these emails, generally with considerably more detail, for a 62 percent response rate.

Based on the free-form responses to questions, we went through the data by hand to code it for what social media channels each respondent was using and how much time they were spending, to categorize their audiences and goals, and to define whether or not they were seeing success—and if so, in what areas.

Facebook Survey

In April and May of 2010, we invited Facebook users to fill out a survey probing into how they use Facebook to research and make decisions about nonprofits.

We made an effort to reach people outside the nonprofit and technologies sector by asking staff members, core

constituents, and Idealware email list and Twitter and Facebook followers to invite their personal friends and family to take the survey, and to post it on their Facebook pages.

In all, 271 Facebook users responded. It's virtually impossible to determine a response rate given the distribution mechanism, but it's likely that only a small percentage of those who saw the survey filled it out. Despite our efforts, about half the respondents worked for a nonprofit or helped others with technology for a living. However, in analyzing the data, there was no significant differences between their responses and others.

Again, we can't assume that our sample is representative of all Facebook users. It's likely that those who responded were more likely to be charitably inclined, as they were primarily staff members of nonprofits or friends and family of staff. However, as this was not a core factor in what we were asking, we feel the data is useful nonetheless.

Twitter Survey

Finally, in June 2010 we invited people to fill out a survey about how they use Twitter to listen to and take action with nonprofits. See the separate methodology report for the full text of the survey.

Again, we made an effort to reach people outside the nonprofit and technology sectors by asking our own Twitter followers, list subscribers and blog readers to retweet the invitation and pass it on to friends and family who use Twitter. We also posted it to several general hashtags (such as #fail) to attempt to recruit from a general population of Twitter users. Unfortunately, we were largely unsuccessful—69 people filled out the survey, and all but 16 percent of them were personally employed in the nonprofit sector.

This means the Twitter survey is specifically not representative of the whole Twitter community, but rather of a particular nonprofit Twitter community. Still, as one would assume that these people are only more likely to get involved in nonprofit causes, the low numbers of people who said they would take any specific actions are interesting.

WORKBOOK

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

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

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

1. 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"> • # of youth following or friending the organization • Volume or % increase in youth volunteering 	<ul style="list-style-type: none"> • 20% increase in youth following or friending the organization • 5% increase in youth volunteers
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"> • % increase in the email list • # of people who say they joined email list because of something they saw on a social media channel • % increase in the email list 	<ul style="list-style-type: none"> • 10% increase of people on your email list during a time frame when you were doing a list-building promotion through social media

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="305 1003 1003 1062">People you could reach with social media</th></tr></thead><tbody><tr><td data-bbox="305 1062 1003 1896"><table border="1"><thead><tr><th data-bbox="480 1234 867 1293">People you want to reach</th></tr></thead><tbody><tr><td data-bbox="480 1293 867 1896"></td></tr></tbody></table></td></tr></tbody></table>	People you could reach with social media	<table border="1"><thead><tr><th data-bbox="480 1234 867 1293">People you want to reach</th></tr></thead><tbody><tr><td data-bbox="480 1293 867 1896"></td></tr></tbody></table>	People you want to reach		<ul style="list-style-type: none">AlumniBoard membersCard holdersCase managersClientsContributorsDonorsEvent attendeesFamiliesFormer donorsFoundationsFriendsGranteesLocal businessesMembersNewsletter readersPartnersPast volunteersPatronsPeople on your email listPeople on your mailing listPeople who purchase ticketsPotential donorsPressProspectsResident expertsSenior citizensStaffStaff alumniStore patronsStudentsVendorsVisitorsVolunteersYouth
People you could reach with social media					
<table border="1"><thead><tr><th data-bbox="480 1234 867 1293">People you want to reach</th></tr></thead><tbody><tr><td data-bbox="480 1293 867 1896"></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"/>

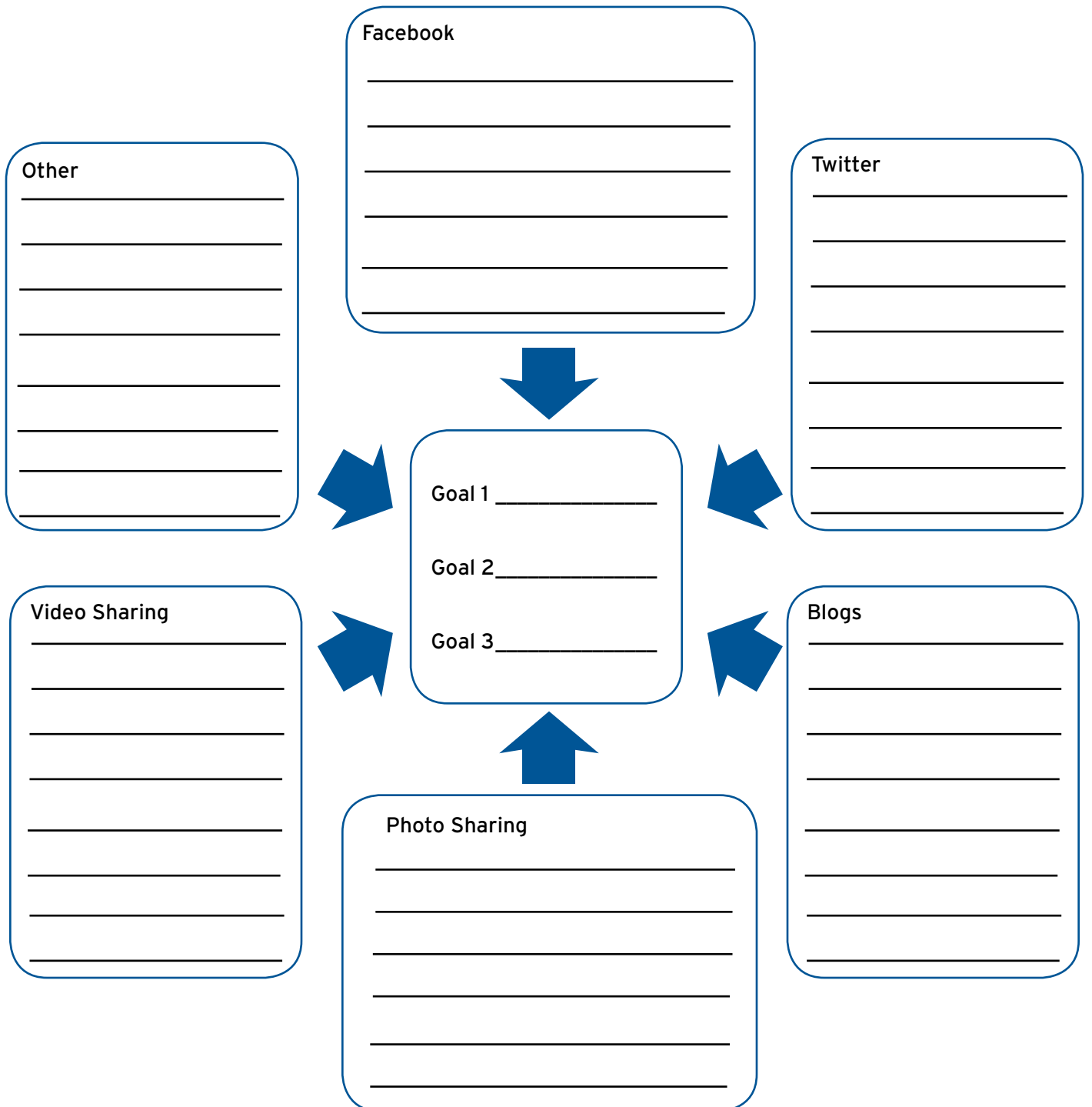
Other thoughts or comments?

Would you be willing to be interviewed in more detail as we work though 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/

FOR MORE INFORMATION

Looking for more information about social media? There's more and more resources every day, but in particular there's a few high-level sources of information that will help you find your way through all the rest.

Beth's Blog

beth.typepad.com

Beth Kanter's blog is a treasure trove of great information. She covers social media for nonprofits especially, and not only posts more than daily with new examples, case studies and cutting edge information, but often rounds all of that information up into summaries and overviews.

The Networked Nonprofit

(available through bookstores)

Beth Kanter (of Beth's Blog fame) and Allyson Fine have just released a very helpful book, devoted to how nonprofits can use technologies to help make themselves the hub of their own social network. It has a large focus on the organizational impacts of social media, with much more discussion of how social media can transform the culture of an organization than we've discussed here.

Idealware's Social Media Library

www.idealware.org/reports/social-media-resource-library

As part of this research, we read through a huge amount of the existing information about social media for nonprofits. As we went, we compiled a library of resources, categorized by topic and level.

We Are Media

www.wearemedia.org

The Nonprofit Technology Network sponsored this collaborative website, which provides a curriculum to learn more about social media, as well as a huge amount of links to other resources.

CONSULTANT DIRECTORY

It often makes sense to hire a firm to help you define or implement a social media strategy. To help you find one, we've compiled a number of the organizations and individuals that offer services in this area.

These are paid listings; each firm paid a sliding scale fee to be included, based on the size of their firm. Those with logos and descriptions paid more for these elements to be included. Idealware has not assessed the services provided, but only aggregated the information given to us by the firms. Conduct your own due diligence before hiring any firm.

Looking for someone to help in a specific geographic region? These listings are arranged geographically:

California.....58	New York and New Jersey.....65
Mid Atlantic.....60	Pacific Northwest.....68
Midwest and Mountain.....63	South.....69
New England.....64	Outside the United States.....70

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<p>Branded4Good Marketing Services</p> 	<p>www.branded4good.com</p> <p>Irvine, CA</p> <p>We help nonprofits create the marketing, social media, and web infrastructure they need to support their fundraising efforts, developing the right mix of tools appropriate for each organization.</p> <p>Julie Damon, 949-551-6121 or julie@branded4good.com</p>
<p>Fission Strategy</p> 	<p>www.fissionstrategy.com</p> <p>San Francisco, CA</p> <p>Social media strategy for nonprofits: Facebook/Twitter/web applications; grassroots event planning; online campaigns; online and mobile outreach strategy; website design/development; and more.</p> <p>Rosalyn Lemieux, 202-390-9962 or roz@fissionstrategy.com</p>

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Forum One Communications



www.forumone.com

San Francisco, CA

Forum One, publisher of OnlineCommunityReport.com, has been building community and advising influential organizations on social media for over a decade.

Andrew Cohen, 703-894-4350 or acohen@forumone.com

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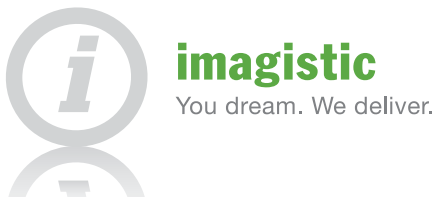
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<p>Jamie Whitaker</p>	<p>www.worthyremarks.com San Francisco, CA Jamie Whitaker, 415-935-5810 or worthyremarks@gmail.com</p>
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www.changingourworld.com

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www.darimonline.org

Charlottesville, VA

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Lisa Colton, 434-977-1170 or lisa@darimonline.org

Fission Strategy



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Washington, DC

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Rosalyn Lemieux, 202-390-9962 or roz@fissionstrategy.com

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<p>Rachel Perrone</p>	<p>Washington, DC Rachel Perrone, 202-525-6262 or rachel.perrone@gmail.com</p>
<p>Zoetica</p>	<p>www.zoeticamedia.com Washington, DC Geoff Livingston, 703-859-0089 or geoff@zoeticamedia.com</p>

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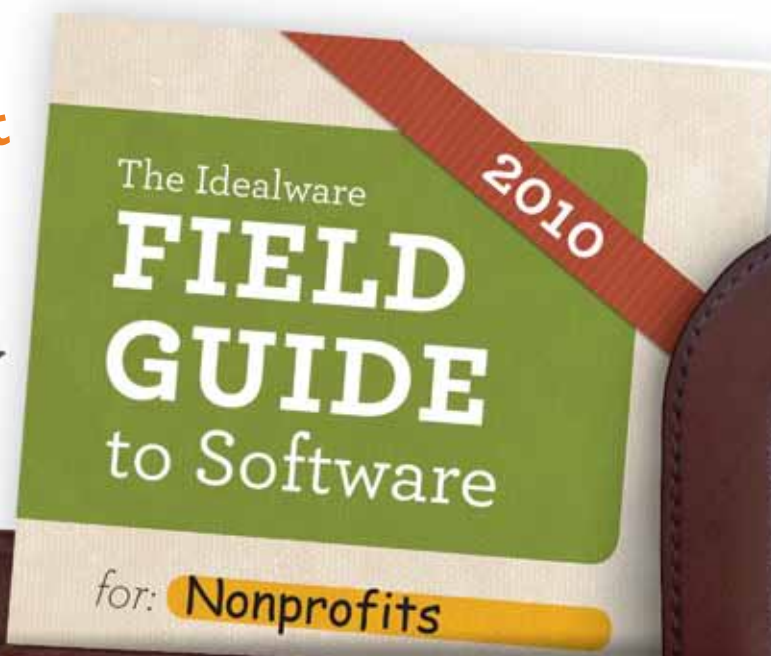
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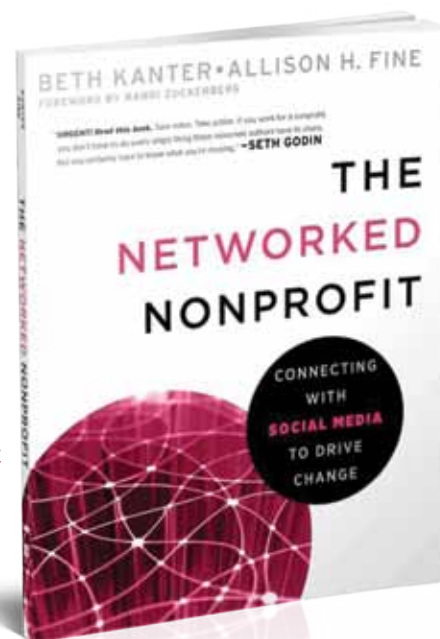
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