



# Social Media Planning Guide for Voluntary Sector Organisations

**So you think you want to use Social Media?**

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# So you think you want to use Social Media?

A Social Media Planning Guide for Voluntary Sector Organisations

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**Communicating • Networking • Informing • Promoting • Campaigning • Developing**  
Use Social Media to transform your organisation and the way you work

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## Introduction

**‘Old’ media, such as newspapers and TV, is mainly about other people publishing information using expertise and tools that we can’t afford. ‘New’ media (often called Social Media) uses more conversational tools on broadband connections and mobile phones to create a more interactive and participative culture. Web 2.0 is not a technical specification but suggests that we have moved on from the first version of the internet i.e. Web 1.0.**

The nuts and bolts of social media make it much easier to produce information, tell stories, share ideas and participate in new communities. It includes new tools such as blogs, forums and wikis and is increasingly referred to as ‘social media’.

Beyond the jargon it offers new ways to link people together, build networks and sustain virtual communities who can publish their own photos, videos and news.

So what can it do for you? It could create opportunities for you to develop new services and campaign for change, but without care may further marginalise the people you work with. Whatever you do it is being used by a wider cross section of the public so it is important that you consider what role it could play in the future development of your services.

Social Media is brilliant – if used well and will transform your organisation by getting it right.

In this no nonsense guide we show you just how to go about using the power and potential of social media in a way that is right just for you. Find out how this exciting and innovative technology can help you to reshape your organisation and the way you work.



## Aims of the Guide

- To put your organisation and its purposes first and help you plan how social media can be used as an extra tool to assist you in achieving your goals.
- To help you understand if social media will be helpful for your organisation
- How to develop and implement a social media strategy.

It recognises that voluntary and community organisations (VCOs) cannot afford to spend time or money on anything which does not help them with their overall purpose.

The guide has been kept intentionally short, practical, to the point and in an easy to use work book format in order to fit in with the limited time available to VCOs.

## Background

This guide is the final result of a social media experiment (#socialmediavco) exploring how social media is of value to VCOs, and how it can help them to achieve their goals. To see the background and to follow the experiment, go to the #socialmediavco category of the blog of the Regional ICT Champion for Yorkshire and Humber

<http://yhictchampion.wordpress.com/category/socialmediavco/>

## How the guide works

The first part of the guide looks at what your organisation is trying to achieve. This is important and helps to create a focus so that any social media strategy will directly link to these goals.

It establishes if social media will be helpful for you at this time. This will ensure that you do not waste time on something that is not appropriate for you.

If you do decide to go ahead the guide then leads you through a step by step process on how to go about this. The guide is laid out so that, once completed, it will serve as your Social Media Strategy Document. You may wish to make more extensive notes and use the guide to summarise and present to your Board.

Don't be put off by the word strategy. Think of it as a plan or a roadmap. It's just a statement saying 'we are here' ... 'we want to be there' ... 'how can we make it happen?'.

**NOTE:** The guide does not go into details of how to use individual social media tools; however Appendix 3 lists the main ones, together with links to follow for further information.



## Benefits of Social Media

Always think in terms of **needs and benefits first** – the best social media tool for the job can follow later. Good social media use is about developing conversations with you supporters and communicating by listening as well as speaking. See Appendix 1 at the end of the guide for a list of some of the potential benefits of social media. This may prompt you for ideas on how social media might help you to achieve your organisational goals.

### Questions to answer

#### 1. What is your organisation trying to achieve?

This is the overall purpose or mission of the organisation.

#### 2. What are the specific organisational goals that you think social media might be able to help you with?

Social media is generally all about communication so it is likely that the organisational goals will relate to this in some form or other. This may be to do with connecting with current clients, to PR and marketing or raising awareness. At this stage it doesn't matter too much that you may not know what form of social media to use or how to use it.

So now you know what you want to do and you think social media might be able to help you achieve it. The next step before you go any further is to establish if this is true.

By that I mean ...



**Whether or not it would be realistic and suitable for your organisation at this time to use social media.**

The following questions will help to establish this.

**1. Do you already have a website that you can update yourself?**

This does not have to be an all singing, all dancing website, just one that you have control of. If you don't then you would probably be best focussing on this first. There are a number of ways to go about this.

The one exception to this is if your target audience is likely to connect with you via Facebook as this can be used very effectively as a website i.e. is your target audience under 30?

**2. Are any of your target audiences using social media already (or likely to be doing so within the next 2 years)?**

It is a good idea to ask them. At least that way you can be pretty sure. If they are then you have a better idea where to focus your efforts. If they are not then are they using email? This can be a great medium to bring social media to your audience without them having to be actively involved with a particular social media route. It just might need more guidance from you.

**3. Have you (or whoever is going to be doing it) got the time?**

Time to set it up and time to keep it going. You need both of these. The initial set up time can be seen very much as a project and may require a fair bit of commitment over the first month or two. Following that it just needs a small amount of regular time. Don't underestimate this though. You need to have both the time and the commitment to keep it going. How much? Once set up it very much depends on the route that you have taken but it may be a small amount daily or a bit more weekly.

If the answers to the above are 'Yes' then it is likely that social media will make a significant difference to your organisation. If the answer to any of them is 'No' then you need to think carefully if this is the right time for you to be spending time on this area. Don't write it off completely. Things change so quickly that if you were to review the questions this time next year, then the answers may well have changed.





**So, Still want to go ahead? Ok.**

**How to get started.**

Don't just think '**build it and they will come**', it's unlikely you'll see interest soar in your cause or campaign just because you've a fancy new social media website or social networking account that you hope people will stumble across. It's important you ask each question and follow each step when planning how to use social media.

The guide is laid out in 7 steps with guidance and a table to fill in for each step. On completion of the first 6 steps you will have your Social Media Strategy in place and implemented. You will probably want to 'jump off' along the way and discuss your progress and decisions with your Board before continuing onto the next steps.

Remember that this has been kept purposefully simple with the intention of helping you to get started. Once you have completed and implemented the first 6 steps of the guide you will then be able to take your learning into your review at step 7. At this point you can choose to go through the guide again to help you to further develop your social media strategy.

**1. Pick one of your goals that you want to pursue.**

This will give you a focus and help you to build your social network, and your understanding, one piece at a time.

What is the message behind your goal? What is the key statement you are making?  
What is the tone, context and how frequently do you want to convey this message?

<b>Organisational Goal and your Key Message</b>





**2. Decide who is going to be involved and how much.**

Whether an individual, everyone in the office or a group of volunteers, there needs to be a level of commitment. Treat it as a part of your job description or a project which you will report on. It's an increasingly important way to raise the profile of your organisation and its' message. It is a conversational way of involving your supporters & marketing what you do. Its part of your communication plan - an 'as-well-as', not something to be looked at in isolation or just given to a 'techie or someone who 'uses it at home'.

Team Member	Role



**3. Research.**

Take time to look at and listen to what others are doing in similar fields. You'll find quite a difference between the UK and the USA where social media is used much more extensively. You may be able to learn from their approach so don't rule them out just because they are not UK based. Find organisations of similar size to yours that are using social media.

Ring them up. Get involved. Ask questions.

See Appendix 2 for some guidelines your organisation should consider and discuss for responsible use of social media websites.

<b>Organisation</b>	<b>Social Media being used</b>	<b>Details</b>



**4. Decide on your approach.**

What social media tools are you going to use, how are you going to use them and why? You may have a grand plan to use a network of different tools and link them all together and this can be very effective, however it is best to start with one and really get to grips with that. It may be that you will have a central focus to your social media such as your website or blog in which case be sure that you are happy with how that is working first. Think how social media tools can be supplementary to your existing communication and media use. These are not a replacement but an additional resource.

It is also useful to plan and decide how often you will visit, check, update & review each tool and how much time you set aside for each activity. Suggestions could be:

**Daily** - Tweet, re-tweet, check Google Alerts, check RSS reader, reply to comments

**Weekly** - Write blog post, check analytics, monitor groups & find new people to follow

**Monthly** - Add video to YouTube, share content online, create podcast & build profile

Social Media Tool	Reason/s for using this tool	What we are aiming to achieve with this tool.	Frequency (D/W/M)



**5. Jump in.**

Don't feel that you have to get it right first time. Whether it is Facebook, Twitter or some other form of social media that you start with, everyone who is currently using it will have had to start at some point too. So there is generally a lot of help available with people being patient, kind and helpful. Have the courage to experiment, change things, get it wrong, make mistakes – or even to delete your account after a trial period. This is where most of our learning takes place.

Social Media Tool	What works and doesn't work for us	Learning & Development



**6. Measure your success.**

Don't expect overnight success. Just because you put what you think is something hugely interesting, informative and fun up on your blog / Facebook etc it doesn't mean the rest of the world will come flocking to your door. This takes time and consistency. Make sure you have some means of measuring your achievements – website stats, phone calls, event bookings – whatever is relevant to your goals.

Use of social media is most definitely a two-way process. Link to other organisations pages, comment on other peoples' blogs, re-tweet what others say and build living conversations. Keep your content fresh & relevant - if you don't do it, someone else will.

<b>Social Media Tool</b>	<b>How we will measure success</b>	<b>Targets</b>



## 7. Develop.

Continuous change is at the heart of social media. Regularly review what you are doing and how it is helping you to achieve your organisation's goals. If you want to introduce another form of social media, go through this process again. Take your time and above all enjoy it.

It is very important that someone has the role and responsibility of keeping your social networking presence alive, your network running or the conversations flowing ... something that often gets neglected after the initial buzz of the launch.

Here you can fill in your Social Media Strategy Review.

Social Media Strategy Review



**NOTES**





## Appendix 1.

### Some of the potential benefits of social media.

1. Spreading the word. This is what it is all about. Getting your organisation / campaign / issue better known. It provides an additional web presence and ways for people to understand what you are all about. It helps to build your 'brand', who you are, what you do and why.
2. Create a following. It gives people the opportunity to identify with a cause and to feel involved.
3. Developing a central networking place which in turn allows you to be more efficient and effective in your communication.
4. Providing a personal face to your organisation. Not necessarily literally (though that often is the case) but that personal connection gives a much better feel for your organisation than what can be a rather faceless brand.
5. Gathering information. It isn't just about you getting your message out there. Social networks are social. They are as much about listening as talking, receiving as giving. You become better informed as a result.
6. Building communities. Far from the internet breaking down community life, the effects (particularly of social networking) are the opposite with people coming together more both on and offline.
7. Up to date. Social networking is all about what is happening now. It helps you to keep up to date and to keep others up to date.

So, is it for you? Are you ready and able to take the plunge? There are loads of resources on the web for the various social media software. However much of the help provided is aimed at business and at larger non-profit organisations. For an overview on how the different forms of social media might be able to help small voluntary organisations, check out the social media experiment category #socialmediavco on the Regional ICT champion blog at

<http://yhictchampion.wordpress.com/category/socialmediavco/>



## Appendix 2.

### How an organisation can use Social Media responsibly

#### Introduction

‘**Social media**’ is the term commonly given to websites and online tools which allow users to interact with each other in some way – by sharing information, opinions, knowledge and interests. Social media involves building communities or networks, encouraging participation and engagement.

Social media encompasses podcasts, ‘wikis’ (such as [Wikipedia](#)), message boards, social bookmarking websites (such as [del.icio.us](#)), social networking websites (such as [twitter](#), [facebook](#), [bebo](#), [MySpace](#)) and content sharing websites (such as [flickr](#), [YouTube](#)).

The growing popularity of social media has attracted the attention of organisations and individuals as these platforms can open up new opportunities for communication. The opportunities are indeed there, as are the pitfalls. The following guidelines are there to provide you with information to make responsible decisions and to get the best out of the tools available.

#### Principles

These principles **apply to your online participation in the context of being an employee of the organisation** and set out the standard of behaviour expected in representing the organisation. You should participate in the use of social media the same way as you would with other media or public forums such as giving public presentations or speaking at public events.

We encourage positive representation and promotion of the organisation and therefore welcome staff in building upon this through use of social networking websites. You are representing our organisation and we trust you, so act accordingly.



- **Be professional;** remember that you are an ambassador for our organisation. Wherever possible, disclose your position as a representative of the organisation.
- **Be responsible;** and honest at all times. When you gain insight; share it with others where appropriate.
- **Be credible;** accurate, fair, and thorough and make sure you are doing the right thing.
- **Be responsive;** in a similar way to how you would respond to a letter or email. Visit and check frequently the online spaces and feeds where we have a presence or could be mentioned and respond positively and promptly to the conversations.

Always remember that participation online results in your comments being permanently available and open to being republished in other media.

Social media encourages conversations and collaborations as its core, however **never give out personal details like home address and phone numbers** unless totally satisfied who the recipient is.

Also be aware that you may attract media interest in you as an individual, so proceed with care whether you are participating in an organisational or a personal capacity. If you have any doubts, take advice from your line manager.

Stay within legal frameworks and be aware that [libel](#), [defamation](#), [copyright](#) & [data protection laws](#) apply.

## **General Guidelines**

Whether or not a staff member chooses to create or participate in a blog, wiki, online social network or any other form of online publishing or discussion is his or her own decision. However, emerging online collaboration platforms are fundamentally changing the way staff work and engage with each other, with members and other stakeholders.



Be aware that in other organisations and in other sectors members of staff have been dismissed because of their online activities. While such cases may be rare, it is important as an employee to be aware that posting information about our organisation cannot be isolated from your working life. Any information published online can be accessed around the world within seconds and will be publicly available for all to see and potentially to re-quote and re-post on other social networking websites.

As an employee, you must consider the following when using social media:

1. These guidelines must be followed in addition to our standard **Code of Practice on Internet use** and our **Acceptable use of Computer Facilities** policies.
2. You must ensure that your online activities **do not interfere or cause you to neglect** your role in the organisation, your colleagues or commitments to members and clients.
3. Members of staff are **personally responsible** for content published and comments they leave on social media websites, views which could remain in the public domain for a considerable length of time.
4. When you discuss matters relating to the organisation, **identify yourself** with your real name and, when relevant, role in our organisation and write in the first person. You must make it clear that you are speaking for yourself and not on behalf of the organisation unless given authority to do so.
5. **Be aware of your association with the organisation** in online spaces. If you identify yourself as a member of staff in the organisation, ensure your profile and related content is consistent with how you present yourself with colleagues, clients & members.
6. If you publish content or leave a comment on a social media website that is about the work or policy of the organisation or is related to services we provide, **use a disclaimer** such as “These views are my own and don’t necessarily represent the views of the organisation”



7. **Ask and seek permission first** to publish or report on conversations that are meant to be private or internal to the organisation. **Respect copyright** clauses and don't make reference or quote members, clients or stakeholders without their approval. When you do make a reference, where possible link back to the source.
8. **Respect the views of your audience.** Don't engage in behaviour that wouldn't be acceptable in the workplace. You should also show proper consideration for others' privacy and for topics that may be considered objectionable or inflammatory, for example relating to politics, race or religion.
9. **Don't be confrontational and be the first to correct your own mistakes**, but don't alter previous posts without indicating that you have done so.
10. **Try to add value.** Provide worthwhile information and perspective. Our organisation is best represented by the people who work here and care about its aims and policies. What you publish or comments you leave may reflect on us.

Effective participation in use of social media tools and on social networking sites is a two way conversational process. For a richly rewarding experience be prepared to learn from others and to share your insights when it adds value to the conversation rather than simply stating a position or delivering one way broadcasting.

***Note: Failure to comply with the above guidelines may result in disciplinary action***

**NOTE – These guidelines have been compiled for information purposes only. Within the Creative Commons licence, please feel free to either use all sections or to discuss and adapt points for your own organisation and how your team communicate using social media.**



## Appendix 3.

### Social Media terms explained – a quick summary

'**Social media**' is the term commonly given to websites and online tools which allow users to interact with each other in some way – by sharing information, opinions, knowledge and interests. Social media involves building communities or networks, encouraging participation and engagement. It is sometimes also called **Web 2.0** or **New Media**. Social collaboration and participation is positively encouraged unlike older websites where content was served on pages in a static way with no ability to interact.

As an organisation it's important not to rush into the use of particular social media tool or website just because others are, but to consider how its use complements your message and existing ways of working and communicating. Once this is clear each tool should be considered for its suitability.

The tools fall into **ten** broad categories which are summarised below; words in **BOLD** are examples of tools providing that service. Use a search engine to find out more about each.

**1. Audio Sharing.** A **podcast** is a news feed with a media sound file attached that can be picked up by a feed reader for you to listen to on your PC, an MP3 player or iPod at your convenience. They can be recorded on specialist equipment or simply on many mobile phones and uploaded to websites such as **Odeo**. Using **ipadio** to record a podcast on your phone also give a transcription. Podcasts can be edited using free **Audacity** software.

**2. Blog – (weB log).** Many blogs provide commentary or news on a particular subject, cause or issue; others function as more personal online diaries where entries are displayed in reverse chronological order. A typical blog includes images, and links to other blogs and media. Popular blogging tools include **Wordpress**, **Blogger** and **Weebly**. **Tumblr** generates a blog from short media snippets. (More Info: <http://bit.ly/One-page-blogging>)





**3. Video Sharing.** Websites such as **YouTube**, **Vimeo** or **BlipTV**. Upload and share videos from a digital camera or mobile phone. They can be included on your own website and **tagged** for sharing and easy searching by visitors. Conversations develop from comments about video content or message. **Ustream** or **Qik** can be used to create a live video stream from an event (More Info: <http://bit.ly/One-page-Video>)

**4. Microblogging (Twitter).** A social networking service that allows users to send up to 140 character “updates” as SMS text-based posts. It is ideal for keeping in touch with groups of people or canvassing a wide range of people about a particular topic or question. (More Info: <http://bit.ly/Twitter-for-support-orgs>)

**5. RSS and Feed readers. RSS (Really Simple Syndication)** is just a technical way content is formatted ready for a **feed reader** or **news feed** program (such as **Bloglines** or **Google Reader**) to pickup and deliver to your reader or as an email in your inbox. Feeds are automatically picked up to be read at leisure without you having to visit each website individually. **RSS** feeds are often denoted on websites with an orange RSS symbol. (More Info: <http://bit.ly/RSS-Support-orgs>).

To be instantly notified by e-mail when your organisation or a particular keyword is mentioned you can set up a Google Alert. (More Info: <http://bit.ly/One-page-alerts>)

**6. Photo Sharing (Flickr).** An online photo storage website which also includes tagging and commenting so photos taken by many people but **tagged** with the same terms can be viewed in a single pool. (More Info: <http://bit.ly/One-page-flickr>)

**7. Social Networking.** Websites such as **Facebook**, **LinkedIn** or **MySpace**. These community websites link people who share interests and activities or who are interested in exploring the interests and activities of others. They provide various ways for users to interact, such as chat, messaging, email, video, voice chat, file sharing, discussion groups, blogging and more. **Bebo** and **MySpace** are similar with an appeal to a younger audience.

Using **Ning**, **Grou.ps** or **SocialGo** you are able to create your own social network for free, but check as they may make a charge to use all features and some premium content.





**8. Social Bookmarking.** Websites such as **Del.icio.us** or **Digg**. These are a way to access bookmarks you save or that others have **tagged** and saved about a subject that interests you. (More Info: <http://bit.ly/One-page-bookmarking>)

When content is **tagged** (which can be with a **hashtag** in Twitter, or by **keywords** in other social networking sites) it makes searching and aggregating content so much simpler. (More Info: <http://bit.ly/One-page-tagging>) **Bit.ly** is used to shorten long web addresses and also allows you to view how often the link has been clicked.

**9. Social Collaboration and Productivity Tools.** Software such as **Google Docs** or **DropBox** which allow a dispersed groups of people to work collaboratively towards shared aims, share a document or participate in an online event or conference.

Create, edit, and link pages together in a variety of document formats or create collaborative websites.

Other applications enable you to share in discussions and meetings on-line (**WebEx**), hold audio (**Skype**) or video conferences (**ooVoo**), schedule a meeting collaboratively (**Doodle**), share slide presentations (**Slideshare**) or share printed format documents (**Scribd** or **myebook**). **Eventbrite** features a full range of features for planning, ticketing and managing any free events you deliver.

**10. Wiki.** Websites such as **Wikispaces** or **Wetpaint** allow users to easily create, edit, and link pages together. Wikis are often used to create collaborative websites or allow a dispersed group of people to work collaboratively on building documents. Perhaps the most popular example is **Wikipedia**. (More Info: <http://bit.ly/One-page-wiki>)



## Acknowledgements

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**NAVCA** is the national voice of local support and development organisations in England. We champion voluntary and community action by supporting our members in their work with over 160,000 local charities and community groups. NAVCA believes that voluntary and community action is vital for vibrant and caring communities.

There are nine regionally-based **champions for ICT**. By listening to needs and issues in each region we are developing resources and providing signposting to help organisations use technology more efficiently and effectively. We do not promote technology for its own sake, but believe it must be tailored to reflect people's needs. Nationally we work in an ethical and transparent way to build trust and long-lasting relationships with others to ensure policy and funding developments address the ICT needs of the sector.



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