



# Getting Started with Social Media

A Strategy Toolkit for Nonprofits



# Social Media Is Powerful

Welcome,

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

The toolkit is meant to supplement “[Tweeting for a Better World](#),” an article summarizing a project to help outstanding young leaders and organizations develop their capacity to use social media effectively. The first recommendation is to [read the article](#), which lays out the steps and reasoning behind social media strategy for nonprofits.

You also may access [Google Docs](#) versions of the worksheets included in this toolkit, ready for customization and collaboration.

These resources grew out of the Rita Allen Foundation's intensive capacity-building project to help a diverse group of smaller nonprofits develop thoughtful social media strategies. Nominated by experts in a highly selective process, we identified six organizations to participate in the project.

Like these organizations, we hope you find that the process described in the following toolkit starts your social media efforts off on a path of continual learning, evaluation, and success.

**For nonprofits of any size, the ever-changing world of social media has the potential to increase volunteers, advocates, fundraising, program offerings, and impact. The challenge is how to do social media right—how to develop a strategy that is appropriate for its media and for an organization's audience, goals, and resources.**

**Elizabeth Good Christopherson**  
President and Chief Executive Officer  
Rita Allen Foundation



Educators 4 Excellence ([www.educators4excellence.org](http://www.educators4excellence.org))



Generation Citizen ([www.generationcitizen.org](http://www.generationcitizen.org))



Global Kids ([www.globalkids.org](http://www.globalkids.org))



Green City Force ([www.greencityforce.org](http://www.greencityforce.org))



Isles ([www.isles.org](http://www.isles.org))



Sadie Nash Leadership Project ([www.sadienash.org](http://www.sadienash.org))

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# Overview

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In the rush to join the world of social media, many organizations lose sight of its connection to their real-world goals. This toolkit will help you make these connections as you define your approach to social media. The first template provides an overview of some of the questions the toolkit addresses—think about these questions as you go, and revisit them at the end. The second template asks you to identify and investigate social media programs you wish to learn from on an ongoing basis—including the social media of leaders in your field, organizations with similar goals, and organizations whose approaches you admire.

**Key Strategy Questions**

**Benchmarked Social Media Practices**

# 1. Choose appropriate social media goals and connect them to organizational goals

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Effective social media strategy flows from core organizational goals. The templates in this section ask you to revisit these goals, considering your intended impact (what you're trying to accomplish) and theory of change (how you make it happen). Being clear about your audiences, activities, and intended short- and long-term outcomes will help you identify opportunities to use social media in your work. In addition to targeting organizational goals, your efforts should play to social media's strength: encouraging authentic interaction through conversation with your audience. The final template in this section asks you to think about which gaps in your effectiveness social media can best serve.

**Intended Impact/Theory of Change Part I**

**Intended Impact/Theory of Change Part II**

**Matching Goals with Social Media**



## 2. Define and understand your community

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The next step is defining target communities for your specific engagement goals. Are you trying to reach your entire set of stakeholders (volunteers, donors, program participants, etc.) or a subset of these? What kind of actions are you hoping to see them take related to your social media? You also need to consider what these communities want. What are their social media habits? What will they get from your social media? The templates below will get you started on creating surveys and interviews to help you find out how your target communities would like to interact with you via social media. In addition, continue to spend time on social media yourself, paying particular attention to your benchmark organizations. Most of all, listen. How can your social media go beyond one-way communication to accomplish your goals and those of your communities?

**Survey Questions**

**Interview Questions**



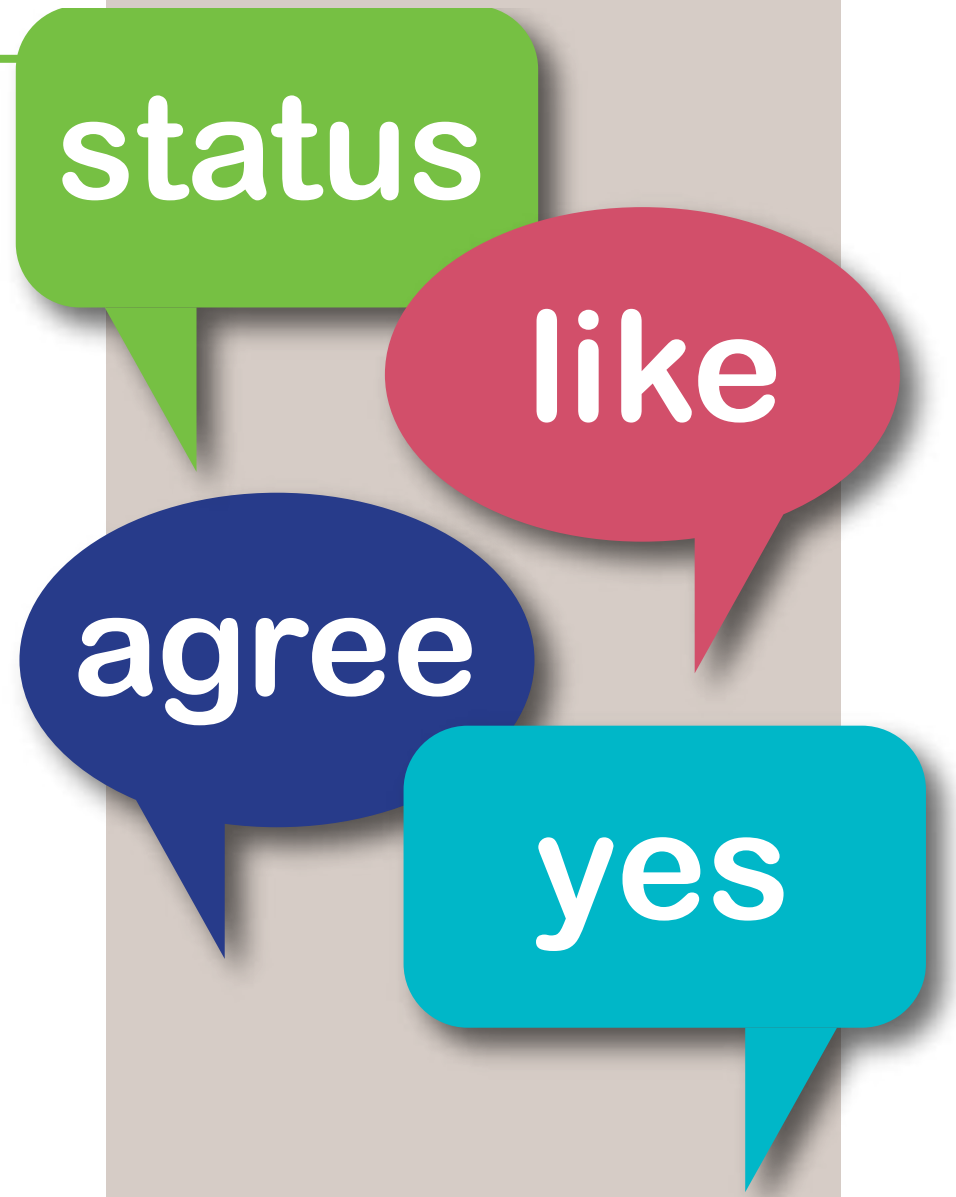
### 3. Determine what to measure

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In some ways, measurement in the online world is easy. Followers, likes, views, comments—each can be quickly counted and tracked. You can set measurable goals for improvement, like increasing the click-through rate to your website from Facebook and Twitter by 100 percent or increasing likes by 50 percent over the next six months. But it's important to keep in mind that your social media goals are connected to your overall organizational goals. Find ways of learning how well your social media activities are serving your real-world goals. This can be done, for instance, through periodical surveys and asking event attendees what brought them there. The templates in this section help you work through the process of defining what you will measure and how you will define short- and long-term success.

#### What to Measure

#### Definition of Success and Targets





## 4. Allocate resources to get the job done

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On a more practical level, you will need to consider how your social media work will fit in to your organizational resources and structure. While many social media tools themselves are free, the first template in this section walks you through potential start-up costs for social media. What will drive ongoing costs is staff time—the time it takes to create content, to post, to respond to comments (including challenging ones), to analyze what’s working, and to test out new approaches. The second template gives a framework for projecting staff time. The third template will help you decide who within your organization will be taking on social media roles, whether to create or approve content and strategy. Also consider creating a formal policy covering social media conduct and official procedures in the event that something goes wrong.

**Projected Initial Social Media Costs**

**Projected Ongoing Costs: Staff Time**

**Key Processes and Roles**



## 5. Experiment, monitor, and modify

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Social media lends itself to learning through doing. Experiment with different approaches and see what works for your audience. The last template will help you think systematically about experimentation and modification. Throughout your efforts, try to understand how your communities are reacting to your social media, not only online, but in the wider world of your organization's work.

### Learning Agenda



# Additional Resources

## More on Defining Your Organizational Goals

### Bridgespan

A rich collection of resources related to building nonprofit strategy  
[www.bridgespan.org/LearningCenter/Default.aspx?id=384&taxid=106](http://www.bridgespan.org/LearningCenter/Default.aspx?id=384&taxid=106)

## Reports on Social Media for Nonprofits

### Idealware

Multiple resources for nonprofits strategically engaging in social media  
[www.idealware.org/topics/social-media](http://www.idealware.org/topics/social-media)

### Ventureneer

“Social Media for Your Nonprofit: Take Charge!”  
[www.ventureneer.com/sites/default/files/ebooks/ventureneer-socialmedia-nonprofits-take-charge.pdf](http://www.ventureneer.com/sites/default/files/ebooks/ventureneer-socialmedia-nonprofits-take-charge.pdf)

## Facebook Resource for Nonprofits

### Non-Profits on Facebook

[www.facebook.com/nonprofits](http://www.facebook.com/nonprofits)

## Twitter Resource for Nonprofits

### Twitter for Good, Claire Diaz-Ortiz

[blog.twitter.com/2011/08/new-resource-for-non-profits.html](http://blog.twitter.com/2011/08/new-resource-for-non-profits.html)

## Notable Commentators

### Beth Kanter, [www.bethkanter.org](http://www.bethkanter.org)

The author of *The Networked Nonprofit* and *Beth's Blog: How Networked Nonprofits Are Using Social Media to Power Change*, one of the longest-running and most popular blogs for nonprofits.

### Heather Mansfield, [nonprofitorgs.wordpress.com/](http://nonprofitorgs.wordpress.com/)

The author of *Social Media for Social Good: A How-To Guide for Nonprofits* and owner of *DIOSA Communications*, Heather Mansfield runs the blog Nonprofit Tech 2.0: A Social Media Guide for Nonprofits.

### Rosita Cortez, [www.rositacortez.com/](http://www.rositacortez.com/)

Blogger at Social Media 4 Nonprofits, a resource-rich blog for nonprofits “looking to make sense of the online realm.”

## Reflections on Social Media for Foundations

A report by the Center for Effective Philanthropy, funded by the Rita Allen Foundation, demonstrated that few nonprofits use the social media of the foundations that support them. Both the report and the series of guest blog posts reflecting on its findings are worth reading for any organization considering how to effectively use social media.

### *Grantees' Limited Engagement With Foundations' Social Media*, by Andrea Brock and Ellie Buteau

[www.effectivephilanthropy.org/assets/pdfs/CEP\\_Social%20Media%20Report.pdf](http://www.effectivephilanthropy.org/assets/pdfs/CEP_Social%20Media%20Report.pdf)

CEP Blog posts on social media by leaders in foundations and nonprofits, including Elizabeth Good Christopherson, President and Chief Executive Officer of the Rita Allen Foundation

[www.effectivephilanthropy.org/blog/tag/social-media](http://www.effectivephilanthropy.org/blog/tag/social-media)

This toolkit grew out of a capacity-building project to help a diverse group of smaller nonprofits develop thoughtful social media strategies. The sample plans below show how two of the organizations, Educators for Excellence and Global Kids, built on the above framework to develop their social media strategies. Read more about their learning process and the project in **“Tweeting for a Better World.”**

## Sample Plans

### Educators for Excellence

Educators for Excellence is a teacher-led organization working to ensure that the voices of classroom teachers are included in the creation of policies affecting education and students.

[www.educators4excellence.org](http://www.educators4excellence.org)  
[www.facebook.com/Educators4Excellence](https://www.facebook.com/Educators4Excellence)  
[www.twitter.com/ed4excellence](https://www.twitter.com/ed4excellence)

### Generation Citizen

Generation Citizen works to strengthen our nation's democracy by empowering young people to become engaged and effective citizens. Generation Citizen envisions a democracy in which every citizen participates in the political process.

[www.generationcitizen.org](http://www.generationcitizen.org)  
[www.facebook.com/generationcitizen](https://www.facebook.com/generationcitizen)  
[www.twitter.com/gencitizen](https://www.twitter.com/gencitizen)

### Global Kids

Global Kids works to develop youth leaders for the global stage through dynamic global education and leadership development programs.

[www.globalkids.org](http://www.globalkids.org)  
<https://www.facebook.com/GlobalKidsInc>  
<https://twitter.com/globalkids>