Ready, set, go! Social media fundamentals

What this guide covers

This guidance contains three starter guides are aimed at staff, volunteers and trustees of charities taking their first steps with social media.

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Social media fundamentals

Researched and written by Ross McCulloch and Rosie McIntosh of Third Sector Lab and Be Good Be Social for OSCR, these three starter guides are aimed at staff, volunteers and trustees of charities taking their first steps with social media.

The guides take you through the basics of a social media strategy. There's advice and guidelines to protect your organisation, staff and volunteers. You'll get an overview of why good content creation and maintenance matters. At the end of each guide are resources and examples.

Ready!
Getting started with your social media strategy

Social media can help your charity do its work better. But you need to know why you're doing it and have a strategy to make it work.

Your strategy doesn't have to be complicated or lengthy. Don't panic about the technical side of things. Just be clear about your **goals, audience, channels and measurement.**

1. Goals

Using social media isn't an extra, it's a tool which can be a great way of raising your charity's profile and reaching more people. If you have a communications strategy, it should definitely tie in with it, but it's about more than that. Start with your existing organisational objectives and think about how social media can help you achieve them. Be clear.

For example:
- Encouraging parents to make healthier packed lunches.
- Offering support to students with mental health problems.

2. Audience

Who do you want to speak to? Social media allows us to target quite specific groups. If you know your audience, you can engage with them in the online spaces they use every day and shape your messages to meet their needs. Be specific.

For example:
- Women over 50 who have caring responsibilities.
- People who have learning disabilities and are leaving school.
- Local politicians and councillors.

3. Channels

Social media includes any online space where users can create and share their own content and have conversations with other users.

There are many channels and it might be tempting to sign up to everything, but start small. Learn about which websites your audiences use and think about the kind of content that you might share. Here are some of the main channels.

➢ **Twitter**: micro-blogging site where users share 140 character messages.

➢ **Facebook**: the big one: 75% of Scottish adults have an account. Facebook is about relationships, where people share content with friends, join groups and like material.

➢ **Blogs**: many look at blogging as an online diary. It gives you the space to tell your stories or go into detail about the work your charity does. You can blog on your existing website, or use a blogging platform like Wordpress.com.

➢ **Multimedia**: sites where you can share video, like Youtube and Vimeo, audio, like Soundcloud and Audioboo, or images, like Flickr and Instagram.

➢ **Messaging**: Users can send and receive private messages with their online friends, often in groups. Includes What'sApp, Snapchat, Facebook Messenger and many others.

> **Communities of interest**: networks based around a shared interest, from parenting, to careers, to hillwalking, to … just about anything. LinkedIn, Facebook Groups, Mumsnet and Meetup are a good place to start, but it depends on what you want to talk about.

4. Measurement

With any strategy, you need to measure whether what you are doing is working and adapt what you do accordingly. If you have clear goals, it should be easy to see whether you are achieving them. You can measure:

- Simple things like numbers of followers, how many people are re-sharing or commenting on your posts.
- Traffic to your website following your social media activity.
- Real life changes like volunteer recruitment, conference attendee numbers or achieving a change to a policy.

Helpful resources:
- [Social media planning guide for voluntary sector organisations](#)
- [CharityComms guide to social media for charities](#)
- [Allsorts simple guide to digital and social media](#)
- [Institute of Fundraising Scotland Social Media Strategy](#) - This strategy is the property of IoF Scotland. You may download it and share with others as long as you credit IoF Scotland, but you can't change it in any way, use it commercially or pass it off as your own. This strategy is shared openly to enable you to think about the key elements you need within your own organisation's strategy.
- [Alliance Scotland Communications Strategy](#)
- National Museums of Scotland social media strategy- available on request, please email h.wallace@nms.ac.uk

Set!

Putting your social media policy and guidelines in place

It's a good idea to have some guidelines in place to support people to use social media in a safe and effective way. It's not about creating a big list of rules: it's about giving people confidence.

If you don't want your policy to sit on a shelf and be ignored, it's a good idea to keep it short and simple. Challenge yourself to keep it under two pages. Here are some things you might include:

- **Who uses social media:** Think about who can use it and how. You might limit your organisational accounts, but encourage people to set up individual accounts. This can include volunteers and service users as well as staff.

- **Listen:** Encourage people to use social media to learn as well as to broadcast your stories. You might be surprised by what you find out online.

- **Tone of voice:** Imagine that each social media user is attending a conference as your representative. It's the same idea online. They could still have human conversations about lunch and remain professional.

- **Topics to avoid:** Be clear about this. Obviously, everyone should avoid anything that is confidential or offensive, but are there any other no-go areas for your organisation?

- **Dealing with controversy:** There's nothing wrong with plural voices and differing opinions, but you should think about how you would deal with negative comments. Sometimes, it's more appropriate to take the conversation offline and respond privately rather than publicly.

- **Relationships with beneficiaries:** You should have clear guidance on whether staff can "friend" or "follow" people you support.

- **Use of personal accounts:** Even if your organisation doesn't use social media, your staff and volunteers do. You should offer guidelines on how they talk about your charity.

- **Complaints procedure:** Be clear about whether and how you will respond to complaints online.

Remember; don't say anything on social media that you wouldn't say to your mum, your boss or on the BBC.

> **Helpful resources:**
> - [Trust Volunteering Inverclyde social media policy](#)
> - [NAVCA and ICT Champions social media guidelines - scroll to page 17 of the PDF](#)
> - [Institute of Fundraising Scotland Social Media Policy](#)
> - [Citizen's Advice social media model policy](#)
> - [American Red Cross - Social Media Handbook for Red Cross Field Units](#)
> - [IFRC Social Media Guidelines for Staff](#)
> - [NPR Ethics Handbook - Social Media](#)
> - [BBC Social Media Guidance for Staff](#)
> - [CIPR Social Media Best Practice Guide](#)
> - [Five simple ways to get everyone in your organisation passionate about social media](#)

Go!

Creating and sharing great content on social media

You've got a strategy, you've created your guidelines: it's time to get started posting to social media. Good content makes all the difference.

The golden rule is that your content should be:
- ➢ useful
- ➢ interesting

If you share good content, everything else will fall into place. The good news is that Scottish charities have lots of great stories to tell and useful advice.

- **Listen:** Social media is about conversations. It's just as important to listen as it is to talk.

- **Ask questions:** The best way to engage with people is to ask questions. You'll also find that it's a great way to learn.

- **Create or Curate:** You don't have to panic about writing lots of blog posts and making videos. It's just as important to share and comment on what other people have done.

- **Make it personal:** People care about people. Tell stories about the difference you make to individuals and include their perspectives.

- **Mixed media:** It's not all about writing. Share pictures, videos, links to news articles, polls … try it out and see what works.

- **Share the process:** You don't need to have finished "products" to post online. It's just as interesting to hear about where you're going and who you're meeting.

- **Make a content calendar:** What will you post about your AGM, refugee week, Christmas? Having ideas in the diary leaves you time to respond.

Helpful resources:
- Benefits of a good content calendar
- Simple to follow content editorial calendar
- Five charities using authentic storytelling online
- How to speed up your content curation process - a slightly more advanced article but useful to those of you looking to take your content to the next level.

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