



Nonprofit Social Media Policy Workbook

April 2012

**SPECIAL NTC PRINT
EDITION FUNDED BY**



TABLE OF CONTENTS

Welcome	1
Introduction	6
1. What Does A Social Media Policy Mean to You?	8
2. Your Organization’s Social Media Values.....	10
3. Social Media Roles: Who Does What?	12
4. What Should You Say Online?.....	13
5. Monitoring Policy	15
6. Responding to Negative Comments	17
7. Responding to Positive and Neutral Comments	18
8. Privacy and Permissions	20
9. Thinking Through Copyright and Attribution.....	22
10. Drawing the Line Between Personal and Professional	24
Writing Up Your Policy	27
About the Authors.....	28
Consultant Directory.....	29

WELCOME

Dear Reader,

When Idealware called to tell us about this project, we could hardly hide our enthusiasm. The Social Media Policy Workbook, paired with the Nonprofit Social Media Decision Guide, published in October 2011, is a unique, exciting resource for organizations who want to nurture their online relationships.

Creating and managing online content has never been so complicated. Nonprofit organizations are expected to create more content for a growing number of communication channels, with fewer resources than ever before. It's no longer enough just to "be there"—you need to motivate your fans, followers and friends to interaction and advocacy. A solid strategy that looks holistically at your online properties and guides you to an overall goal is crucial to the success of your organization.

We hope the Social Media Consultant Directory leads you to an experienced guide to aid you in your efforts. Together, you can define and execute social media strategies that:

- Strengthen your brand loyalty through communities of interest
- Utilize your content and conversation to create conversions
- Create compliant and consistent standards for your organization
- Produce measurable results

In a world big on ideas and short on implementation, we hope that you are able to take full advantage of the knowledge and guidance Idealware has provided to all of us.

All the Best,

Tracy Betts

Tracy Betts, CEO
Balance Interactive
@balance_team
@tracybetts

Handy Social Media Checklist

- Set clear objectives & solidify your policies
- Define your key metrics to measure those objectives
- Build your presence and cultivate your network
- Experiment, listen, measure, and adapt

What Beaconfire does every day.

Defining social media efforts that will have an impact on your constituents make a difference for your organization. Whether Facebook, Twitter, YouTube, the blogosphere, your site or private community – or all of them, Beaconfire creates social media endeavors that move your agenda forward.

Connect with us to learn more about social media results that shine. beaconfire.com.



2300 Clarendon Blvd, Suite 1100 Arlington, VA 22201
info@beaconfire.com | 703.894.0080



@FORUMONE

WE BUILD MISSION-DRIVEN WEB SOLUTIONS

- » Online advocacy campaigns
- » Complex, data-rich websites
- » Award-winning user experience and design
- » Over 100 Drupal, WordPress implementations
- » Specializing in online collaboration and community building



www.aifestival.org

LEARN MORE AT FORUMONE.COM

A holistic approach to
your online ecosystem

**Strategy. Content.
Interactive Design.
Implementation.**

Measurable Results

Helping you connect
in meaningful ways

703.451.8675
www.balanceinteractive.com

BALANCE
I N T E R A C T I V E
POISED TO DELIVER.



We can help you bridge the
gap between where you are
and where you want to go.

**Thoughtful,
effective solutions
for organizations
tackling real world
problems.**

Talk to us.
877.661.1872
heytrellon@trellon.com



Trellon
www.trellon.com

EXPAND

Get better results with a social media strategy

your network

To get our free guide and to learn more, visit:
<http://www.newsignature.com/socialmedia>



NEWSIGNATURE
202.452.5923 ext. 1

- Campaign and advertising management
- Social media strategy assessment and planning
- Social media analytics and conversion tracking



“I want to be sure that we do more than just teach you something – we show you how to apply it to your day-to-day work.”
—Andrea Berry, Director of Partnerships and Learning

What do you want to learn today?

This is Andrea. In the coming months, she'll lead webinars, half and full day seminars on social media topics ranging from how social networking tools work to measuring and optimizing your social media presence. All of our trainings—like our articles and reports—are packed with original research and analysis to help nonprofits of all sizes make smart decisions about software.

To register for online trainings, commission us to train your network, or just to learn more about Andrea and the rest of the Idealware team, visit www.idealware.org.

idealware

Helping Nonprofits
Make Smart
Software Decisions

INTRODUCTION

As nonprofits have increasingly turned to channels like Facebook and Twitter, policies and guidelines to govern their use of social media have become the new frontier. There's much to learn in this area, and it can be difficult for organizations to find examples that fit their needs. The open and community-based aspects of social media can be a huge benefit for nonprofits looking to reach out to new audiences and engage their existing base, but sometimes it can seem that no one knows the right way to use each channel, or where the lines are drawn—or even how to find out.

It doesn't have to be that way.

A good social media policy will provide clear guidelines as to what staff should and shouldn't do when posting and interacting with the community on a day-to-day basis, freeing them up to think more strategically. It's also likely to help leadership feel more comfortable with the less-formal nature of social media by letting them establish boundaries for its use.

Your organization can create a policy to help guide your whole staff simply by thinking proactively through specific questions about how you would like to make use of social media.

This workbook is designed to help you, as an organization, ask the important questions about social media. Because of the difficult nature of some of these questions, consider these worksheets conversation starters—gather the core people in your organization involved in social media to help you think through them. Who should be involved? It depends on your organization, but examples include the people defining your overall communications strategy, those defining your social media goals and activities, those managing the actual social media sites on a day-to-day basis, and someone from the executive team. If you're a one-man-or-woman band tackling all these tasks yourself, consider pulling in one or two people anyway—even from outside your organization—to have multiple perspectives represented.

Chances are good that you'll find the conversations you have as a team are every bit as important as the product you end up with. Raising the right questions and finding the right answers can be a challenge, but it's worth the effort.

We know that many organizations will want to go beyond this workbook and create a written policy document, so we've created a companion “Social Media Policy Template” that provides sample language and considerations to go along with the worksheets.

You might want to take a look at that language before you start the workbook, in fact, and decide where it fits into your process. Will you work through each worksheet and then the corresponding policy language? Will you complete the whole workbook and then create your language? Or perhaps you'll only do the workbook, and not worry about an actual written policy. You can find the template online at www.idealware.org/smpolicy

As part of our research for this workbook, we interviewed staff members who had been integral to their organizations' efforts to create social media policies. Throughout, you'll find vignettes from case studies we wrote about them to show some real-world examples of what's involved.

Ready? Gather your team together, start the social media policy workbook, and enjoy the journey...

CREATING THE TEAM

When the executive director of a mid-sized family service agency decided that an organization-wide review of policies and procedures would also be a good time to create a social media policy, staff jumped on the opportunity.

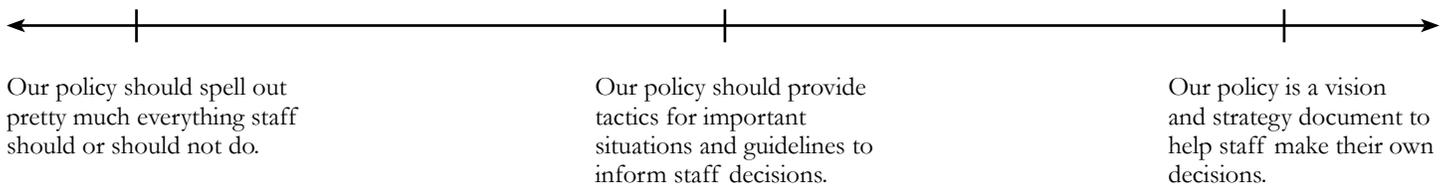
"The way we approached creating a policy was that I worked with the social media committee—myself, another staff member and board members—and wrote most of the policy," said the program director. "I got feedback from them, and from the board and legal counsel to the agency. They made very important suggestions, and I think that's critical to get all that input."

1. WHAT DOES A SOCIAL MEDIA POLICY MEAN TO YOU?

Different organizations can have very different policies. In practice, “social media policy” could refer to a detailed set of procedures for using social media, a legal document written by lawyers, a high-level vision document, or pretty much anything in-between. What kind of social media policy do you want to create?

Tactics or Vision?

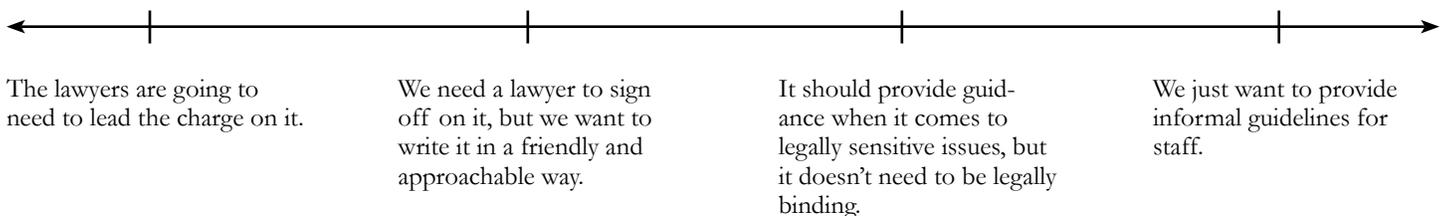
First, think through how much guidance you want to give staff in your policy by plotting yourself on the spectrum below. Make a mark anywhere on the line:



How would you define the purpose of your policy, based on your location on the spectrum? Use one of the definitions given above, or craft your own.

Legal or Informal?

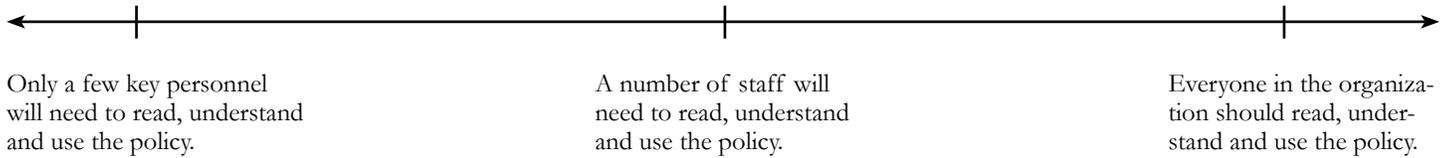
Do you typically have lawyers sign off on policy documents? Is there particular internal sensitivity in regard to this particular policy? How legal in nature do you think your policy should be? Plot yourself anywhere on the line:



How would you define the necessity of including a lawyer in your process, based on your location on the spectrum? Use one of the definitions given above, or craft your own.

How Widely Will You Distribute It?

Who is the policy for? Your core audience will impact what you write and how you write it.



Based on your location on the spectrum, say a little more about who you'll distribute the policy to and how it will be presented.

Is it Part of Something Else?

Will the policy be part of another document, like an employee handbook, or does it need to be in the same style as another document? Do existing policies already include information about this issue? How does this apply to your organization?

SHOULD THE LAWYERS BE INVOLVED?

A large family foundation has specific concerns about crossing the line into lobbying and jeopardizing their 501(c)(3) status. Because foundation leadership is unwilling to test the waters around these legal issues, current practice is to avoid such topics entirely.

"We're very conservative about that," the Communications Officer said. "If the legal line is somewhere around here, we're 15 miles in the other direction, just to be safe. The law in this area is so gray, you have to interpret it on your own. What does it mean to retweet something? Is that an endorsement? All these questions where the law hasn't caught up to the technology, each organization has to interpret it for itself."

She's worried that having to run all posts through a legal review would degrade the organization's ability to take advantage of social media. "We'd run the risk of losing some of the 'socialness' and the immediacy that makes social media effective if we have to run everything through legal before we post it," she said. To that end, she's cautious to post only things clearly distinct from politics, which is limiting.

2. YOUR ORGANIZATION'S SOCIAL MEDIA VALUES

Your social media policy should not live in a vacuum, but should be guided by the values and mission of your organization. Use this worksheet to think about how to translate those values into guidelines for social media.

Your Mission

There's no better place to start than with your mission. Write it below for reference:

Your Values

Define a list of about six core values central to your organization's work. Use the list below as inspiration.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

POSSIBLE ORGANIZATIONAL VALUES			
Accuracy	Craftsmanship	Generosity	Passion
Altruism	Creativity	Honesty	Peacefulness
Agility	Devoutness	Humility	Realism
Approachability	Diversity	Impartiality	Remembrance
Attentiveness	Economy	Inclusiveness	Responsiveness
Caring	Expertise	Ingenuity	Safety
Community Focus	Fairness	Innovation	Solidarity
Collaboration	Friendliness	Modesty	Sustainability
Compassion	Fun	Optimism	Quality

How Do Your Values Apply to Social Media?

Some of these values will translate almost directly to social media guidelines, while others may be less useful. Consider how you might translate them below.

VALUE		WHAT DOES THIS MEAN FOR YOUR PRESENCE IN THE SOCIAL MEDIA WORLD?
	<i>ex. Responsiveness</i>	<i>We will focus on listening to what others are saying in our community and make it a priority to respond in a quick and informative manner.</i>
	<i>ex. Impartiality</i>	<i>We will not take a stance on political issues in our posts, nor offer recommendations not grounded in facts.</i>
1.		
2.		
3.		
4.		
5.		
6.		

If staff were to ask themselves three questions before each post, what three questions would best ensure that their posts fit in with your core values?

1. _____
2. _____
3. _____

CREATING A POLICY TO REFLECT THE ORGANIZATION'S VALUES

The team that created the social media policy for a Jewish agency all agreed they did not want the policy to be a list of "do nots," but a living document that reflected the nonprofit's goals and values.

"We started 'meta' and got to the 'macro,'" said the program director. "We started with the Jewish values particular to us, but any organization has a mission and core values. One example for us was a Hebrew term that translates loosely to 'promoting unity into the community,' which we see as 'to promote community dialogue.' Part of that was enhancing community partnership on social media."

3. SOCIAL MEDIA ROLES: WHO DOES WHAT?

Determining who's in charge of your social media activities is essential to assigning responsibility and accountability throughout your organization for the channels you use. When clear roles are defined, your organization can more easily execute strategy and understand who can—and who cannot—do what. (If you're a small organization, this might be a simple worksheet, but it's still worth defining the roles.)

Who's in Charge?

Who's in charge of all social media and social media strategy for your organization?

Who oversees your communications calendar and coordinates between channels? (This may be the same person as above.)

Different Roles for Different Channels

Next, list in the left-hand column each individual/job title with a role in your social media activities. For each channel:

1. Identify the lead staff member in charge of the channel. Mark that box with a star.
2. For anyone else who is EXPECTED to post on the channel, mark the box with a E.
3. For anyone else who is ALLOWED to post on the channel, mark the box with an A.
4. For any other content contributor who funnels content to one of the people identified above, mark the box with a CC.

PERSON/ROLE	FACEBOOK	TWITTER	YOUTUBE	BLOG	OTHER	OTHER	OTHER
George	E	*		A			
Linda	*	E		CC			
Krista	A		*	*			

4. WHAT SHOULD YOU SAY ONLINE?

What should your staff be posting and sharing online? What topics should they never post about? Think through your own guidelines.

In Worksheet 2, you defined three questions that will help people define whether posts fit in with your core values. Write them again here:

1. _____
2. _____
3. _____

What types of things do you encourage people to post that definitely fit with your values? Consider original content, reposts of other people's content, event or campaign promotion, community highlights, and other types of content. Define some of them here:

- | | |
|----------|----------|
| 1. _____ | 5. _____ |
| 2. _____ | 6. _____ |
| 3. _____ | 7. _____ |
| 4. _____ | 8. _____ |

When is it OK to post something that doesn't meet the criteria expressed in your three questions?

What topics or types of information, if any, require approval prior to posting?

What topics or types of information, if any, should never be discussed on social media?

EDUCATING PEOPLE ON A NEW MEDIUM

A large humanitarian organization developed a policy made up of two parts: best practice and recommendations for social media use, and a summary of existing rules and obligations for staff and how they apply to the use of social media. Some guidelines are broad—like those encouraging users to be passionate and add value—while others are more specific, like the one requiring staff to use a disclaimer distinguishing their own personal views from those of the organization.

The senior communications officer said it was always made clear that a certain level of behavior was expected of people clearly identified as part of the organization, but with social media, the risk of poor behavior being seen by a wider audience is far, far greater. He approached it with a simple idea: before posting something, think of how CNN, your mother and your boss will react if they read it.

“Most of the guidelines are sort of just good advice,” he said. “You’re kind of trying to educate people in a different medium.”

TREADING A LOBBYING LINE

The issue of what can and can’t be posted is of particular concern to this large family foundation, which maintains an active organizational Twitter feed and Facebook page. In its current form, the social media policy covers basic practices for official foundation accounts—essentially, who can post to them, and what they can say as the “voice” of the organization—as well as additional suggestions for individual accounts of staff members who choose to identify their affiliation with the organization.

But there are some considerable gray areas, said the foundation’s communications director.

“One of the main focuses of our mission is to create connections with the state of Israel, and we also work a lot in the [Lesbian/ Gay/ Bisexual/ Transgender] space,” she said. “As a foundation, we can’t do any kind of lobbying work in general, and on social media, we’ve also not been able to do anything with either topic, really, because of advocacy and our 501(c)3 status.”

The fear is that, because the laws covering social media are so unclear, such advocacy might endanger the organization’s 501(c)(3) status and put it at risk of prosecution. She said the foundation’s legal team is currently reviewing the policy to try to determine the ramifications of certain types of posts—specifically, whether retweets or original posts about politically charged topics can be construed as lobbying or advocating a political opinion and endanger the foundation’s nonprofit status.

5. MONITORING POLICY

Hopefully, people are talking about your organization and the issues you care about. How much of the chatter you pay attention to is an important strategy decision.

Who Will Be Responsible?

Think about whose plate monitoring will fall on. Who will be responsible for monitoring external social media (other blogs, Facebook pages, Twitter accounts, etc.) and tracking mentions, questions and other relevant comments?

For your own channels, who's responsible for tracking and moderating comments, if not the person in charge of each?

THINKING ABOUT MONITORING

It can be difficult to weigh the amount of time you should spend monitoring. On one hand, if you aren't listening when someone is talking about you or your issues, you could miss an opportunity to make an important connection, provide customer service or defray a bad situation.

On the other hand, it can be time consuming to monitor everything, and every organization has a lot of priorities to juggle. The more effort you put in, the more results you'll turn up.

But where do you draw the line? What is important for you to know, and what is overkill? How much time you choose to invest should depend on the size of your organization (the bigger you are, the more likely it is that you'll be discussed), the volatility of your issue area, and the size of your online community (a bigger community is likely to necessitate more monitoring).

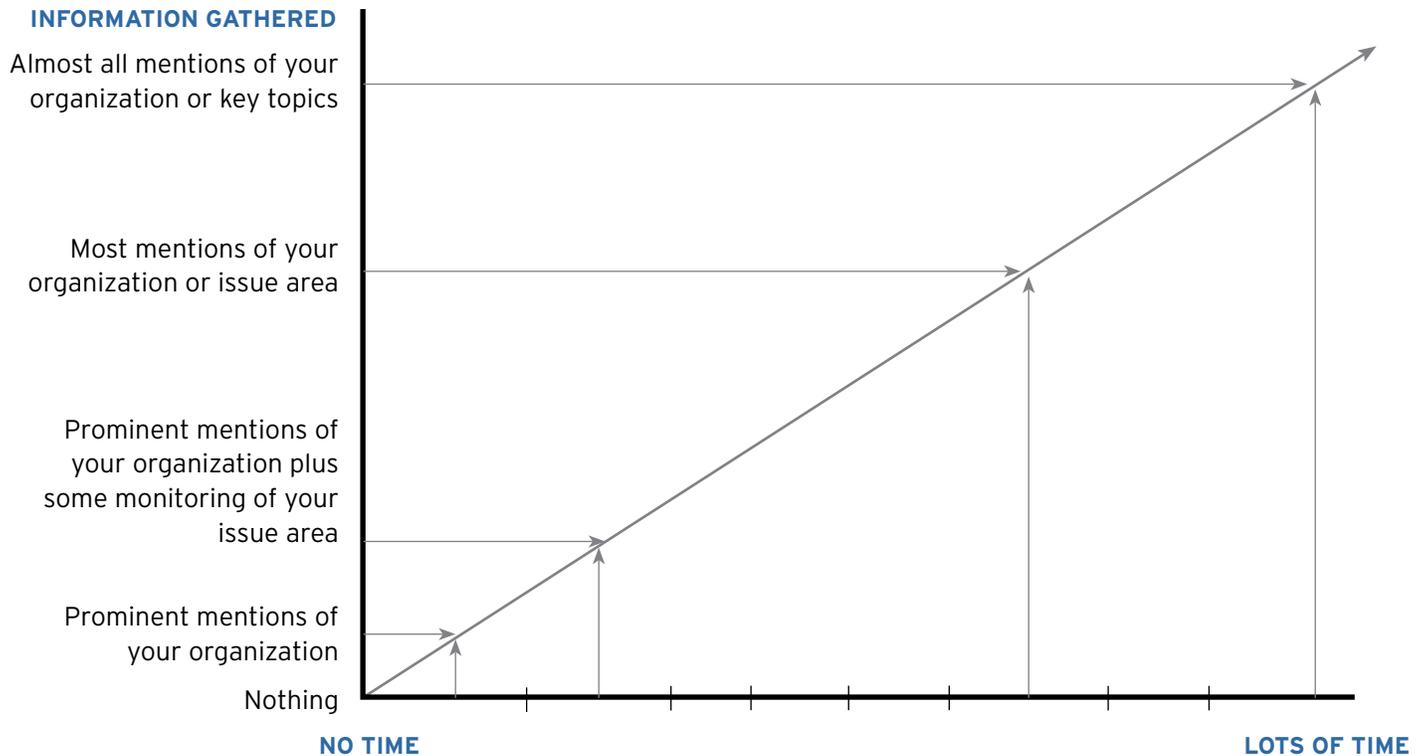
Think about your organizational values as well. Are there values that would impact a decision on how responsive and engaged you need to be?

What's Your Strategy?

Consider your own strategy, taking into account the factors in the Thinking About Monitoring box. Then check the box below that best describes how you would like monitoring to happen at your organization:

- Listening is a way to know if something big references our name, but it is not a priority for us.
- We listen in a few core ways to feel reasonably comfortable that we'll see it if we are mentioned. Listening is useful for us, but we don't obsess over it.
- Listening is important to us for providing customer service and engagement of our key constituents.
- We listen to everyone and everything that could possibly mention our organization in any way to can keep on top of all happenings in relation to our organization. Listening is how we know what to say.

It's important to recognize the tradeoff between time and results when it comes to measuring. In the chart below, mark the line where you would like to see your organization. Note that the hours you put in directly impact what you can get out of monitoring, so no cheating by deciding you're going to get all of the impact with none of the effort!



The amount of time required will vary by organization. For a small organization, "lots of time" might run to 10 hours a week. For one with a particularly large community, it could easily be 40 hours per week.

Write out a statement describing what you plan to do in the world of monitoring. Use the strategy language on the previous page, or craft your own.

BUILDING COMMUNITY THROUGH LISTENING

A large membership organization for nonprofits believes listening to what its community is saying is a core part of its mission. Its goals include actively influencing the entire nonprofit sector, using social media to position the organization as a thought-leader, and nurturing the community. Meeting these goals means investing time and money in helping to foster connections, answer questions, participate in conversations, give congratulations, and more.

Staff spends from 10 to 15 hours each week reading blogs and the organization's own email discussion lists, following conversations on Facebook and Twitter, and using Radian6—a higher-end tool—to monitor social media. While there's a designated Community Manager who oversees the organization's listening process, its social media policy explicitly says that every staff member should be following some blogs—in fact, every staff member is required to post at least one comment a week on someone else's blog.

6. RESPONDING TO NEGATIVE COMMENTS

It's hard to figure out when and how you should respond to a post about you, or on your own social media sites. Always? Never? What if it's really bad? Think through your own policy for the situations below.

SO SOMEONE SAYS SOMETHING BAD...	
1. Could you turn a complaint into a customer service opportunity?	IF YES You should probably respond! Who will respond? What types of things do you say?
2. Does the post have misinformation in it?	IF YES You should probably respond! Who will respond? What types of things do you say?
3. Will it damage your community?	IF YES Consider taking it down. Who is in charge? What will they do, under what circumstances?
4. Does it include vulgarity or purposely inflammatory language?	IF YES Consider taking it down. Who is in charge? What will they do, under what circumstances?
5. Are they likely to keep posting objectionable things simply because you're responding?	IF YES If none of the above were true, but they're likely to keep posting, it's almost certainly better not to respond.

POSTING COMMUNITY GUIDELINES

A national organization with a particularly controversial mission publically posts what it expects of its community. They won't "discourage users from taking controversial positions or expressing vigorously what may be unpopular views," but they reserve the right to take action if posts are "reasonably construed as abusive, destructive, harmful, or threatening to the safety of others."

This kind of publically defined guideline clarifies what's okay and what's not, and allows the organization to more easily take posts down when needed. It's stated right there in the policy: they can "remove any information that is posted in violation of these terms," and "suspend any registered user accounts for people who violate these terms."

7. RESPONDING TO POSITIVE AND NEUTRAL COMMENTS

So you're paying close attention to other people's posts on your own social media sites, and listening to what other people are saying about you. If someone says something, when do you respond?

For each of the situations below, think how you'd want to respond. When would you simply ignore the post and not respond at all? When would you post a quick reply, and when would you write a more thoughtful response?

SHOULD YOU...	Not reply at all	Post a quick stock reply	Write a thoughtful reply	Pull other people in for their insight or signoff	Other
If someone you don't know posts...					
A question for you					
A quick comment about your organization					
A thoughtful or detailed comment about your organization					
Other types of content:					
If a core supporter posts...					
A question for you					
A quick comment about your organization					
A thoughtful or detailed comment about your organization					
Other types of content:					

SHOULD YOU...	Not reply at all	Post a quick stock reply	Write a thoughtful reply	Pull other people in for their insight or signoff	Other
If _____ posts...					
A question for you					
A quick comment about your organization					
A thoughtful or detailed comment about your organization					
Other types of content:					
If _____ posts...					
A question directed to you					
A quick comment about your organization					
A thoughtful or detailed comment about your organization					
Other types of content:					

CREATING A POSITIVE FORCE THROUGH SOCIAL MEDIA

For a large humanitarian organization, the goal of the social media policy was to create a positive force by guiding people and encouraging them in the right direction rather than providing a series of restrictions and limits. The senior communications director drafted it with that goal in mind.

“The guidelines are very much enabling,” he said. “Those were the kinds of ideas we focused on. Because there are so many volunteers, social media should be a natural fit—it should be easy to empower them. I really wanted something which embraces that nature and steers the energy in the right direction. You can’t guide what volunteers say, but you can ask them to think about what the organization would do, and make suggestions.”

8. PRIVACY AND PERMISSIONS

Social media venues are a great way to share information, but it's important to make sure that the information is yours to share. This is especially important for organizations that work in sensitive areas, such as medical or healthcare environments, in which something as simple as a person's name or photo might carry an implication or association with your organization. What should your policies be in this area?

WHEN CAN YOU POST:	Never	With Permission From Those Referenced	Always—This is Not an Issue	Under These Circumstances
Photos or videos where individuals aren't identifiable?				
Photos or videos with clearly identifiable clients, students or other people you work with?				
Photos or videos with clearly identifiable supporters or constituents?				
Photos or videos with clearly identifiable children?				
The full names of your clients?				
Information about the services you've provided to a client, student or other person you work with?				
Someone's name associated with a photo or video (i.e. "tagging" them)?				
A location associated with a photo or video?				
Other:				
Other:				
Other:				

If you've selected the "With Permission From Those Referenced" category for any of your constituents, take a look at your organizational marketing waiver form for photos and videos (if you have one)—is social media included? If not, consider adding an additional clause. If you do not have a current marketing waiver form for photos and videos, refer to bit.ly/ypQ5IJ for more information.

If a third party posts something to one of your sites that seems to violate someone's privacy, you're not legally responsible for it (for more information, refer to bit.ly/aUT4sQ). If you know that a post or photo might make someone uncomfortable, however, it's not a bad practice to take it down anyway.

KEEPING PRIVATE INFORMATION OFFLINE

For one human service organization, "privacy meant everything from getting permission to use photos and videos of clients to directing private conversations offline."

"For example, posts should be made regularly, but only by approved staff," the executive director said. "I never put up a post without running it by the management team—that's important, as it covers you and it covers the agency. Because our organization is a mental health organization that serves clients, we needed to make sure of the legal boundaries. Social media can blur those, and that's only appropriate to a point in certain communities. One example, clearly stated in the policy, is that staff should not engage in any kind of public discussion about private information online."

9. THINKING THROUGH COPYRIGHT AND ATTRIBUTION

There are two sides to copyright and attribution issues. First, what are your policies for allowing other people to use your content? On the flip side, how will you use other people's content respectfully?

How Copyrighted is Your Content?

Are others allowed to use your content? Think through the considerations in the *How Do You Decide* box, and check the option below that applies to your organization:

- Copyright:** People should ask us permission before reposting any of our content.
- Creative Commons:** We'd like to allow others to repost our content, at least under certain circumstances, without needing to ask our permission.

If you've chosen a more open "Creative Commons" approach to your content, choose which of the following are important. Check all that apply:

- Attribution:** If they repost, they should credit us for the content with a link back to our site.
- Derivatives:** Anyone can modify our content as they like, and repost it, without needing permission.
- Commercial Use:** Someone can use our content to sell something, without needing permission.

Check out the Creative Commons website at www.creativecommons.org to find the license version that matches your choices.

How Are You Using Other People's Content?

You shouldn't assume that anything you can find online is fair game for you to use. If there's no indication of licensing on it, you have to assume that it's copyrighted—don't just pull it into your social media sites. It's always OK to link to something, but it's considered good courtesy to include an attribution to the original source.

How will you ensure that staff members aren't posting copyrighted information or photos, and are attributing photos and videos properly when required? Will you moderate? Spot check? Provide training?

HOW DO YOU DECIDE?

How copyrighted should your content be? Weigh the value of keeping full control over it—if others could do harm by using it, for instance—against the value of a more open sharing model.

A more open model lets your supporters promote your work on your behalf, which can have huge benefits. Unless you have a specific reason to reserve the rights to your content, it probably makes sense to allow others a little leeway to repost and distribute it.

Once you decide, put a note on each social media site as to what type of copyright or license you've decided on (the bottom of each page is typical). By default, if you don't label it, all your content is copyrighted—but it doesn't hurt to say so. If you'd like to use a more open license, make sure to let people know.

When you post a link (for instance, on Twitter or Facebook), how will you indicate whose link it is? If you found the link through a third party, will you attribute them too (for instance, if you saw an Idealware resource based on a TechSoup post, would you mention both Idealware and TechSoup or just Idealware)?

10. DRAWING THE LINE BETWEEN PERSONAL AND PROFESSIONAL

Social media forces us to address difficult questions about the different ways our personal lives and professional work can intersect. Navigating between them can be difficult, especially on tools like Facebook that require the user to have a personal account to use an organization's page. It's important to lay out the ground rules ahead of time to ensure that all your staff—who may have very different idea about what's appropriate—are clear about the expectations.

If you do advocacy work, keep in mind that there may be legal issues inherent in people advocating opinions on your behalf. Reference bit.ly/1dfHDv for more details.

Personal Overlapping Into the Professional

Where's the line between personal and professional in your organization? Think through the scenarios below.

WHAT?	Always OK	Never OK	OK in These Circumstances
Posting as the organization on the organization's page/account			
Posting personal info (not related to mission) on the organization's site			
Announcing major life events of staff (such as birthdays, weddings, awards)			
Personal opinion (unsigned)			
Personal opinion (signed)			
Posting as staff member on the organization's page/account			
Official organizational response			
Personal opinion			
Personal informational tidbits			

WHAT?	Always OK	Never OK	OK in These Circumstances
Posting as a volunteer on the organization's page/account			
Official organizational response			
Personal opinion			
Personal informational tidbits			
Posting as individual on personal page/account			
Personal opinion about organization			
Announcements about formal events or resources			
Comments about informal or internal happenings			
Connect with clients or other organizational constituents			

Professional Overlapping into the Personal

What can you request of staff in terms of their personal accounts? This is a difficult area. As an organization, do you actually have any right to define what staff should do with their personal accounts? While you should never require someone to act a certain way, or to post certain things, it is important to identify some expectations and define boundaries for what you can request. Do any of the below apply?

- We might request staff to post organizational announcements on their personal account(s).
- We request that staff maintain a certain moral standard on their personal accounts.
- We'll monitor what staff say about the organization on personal accounts.

THE CLASH OF PERSONAL AND PROFESSIONAL

If staff members are posting on your organization's behalf to personal accounts, that can lead to sticky legal issues if they leave your organization. For instance, what happens if your executive director has a huge personal following on her Twitter account that's engaged in discussions about key organizational topics, and then she leaves the organization?

It's worth trying to structure your social media strategy to prevent this. Ensure that you have legal control over the accounts you rely on—for instance, define that they're set up on behalf of the organization, regardless of who's posting.

If this is an issue for you, it might be worth contacting your lawyer to define the risks and find ways to prevent them.

If you checked any of the boxes, describe your policy in more detail below. When does it apply?

PERSONAL AND PROFESSIONAL BOUNDARIES

One of the thorniest areas of policy faced by the family service agency was that of personal and professional boundaries. Even if staff don't self-identify on their individual Twitter feeds or Facebook pages as employees, in most cases, a good number of people still know where they work—it's difficult to keep those worlds completely separate.

"Personal online posts should be consistent with [the organization's] mission," the program director said. "There has to be a decision, whether you agree with that solution or not, about whether you feel it's necessary to dictate how personal pages reflect the organization. It needs to be clear to employees what that separation is. You can't discuss all the specific situations, but you need to consider broader statements that will cover them."

WRITING UP YOUR POLICY

Hopefully, these worksheets helped you to refine your organization's thoughts about how you're using social media, and to define what is and isn't appropriate. We know, however, that many organizations will want to go beyond worksheets to create a written policy document.

To help with that, we've created a companion "Social Media Policy Template" that provides sample language and considerations to go along with the worksheets. It will help you to define the wording that makes sense for you based on what you filled out in the worksheet, and to think through the various permutations that are possible.

You can find the template online at www.idealware.org/smpolicy

ABOUT THE AUTHORS

Andrea Berry, Idealware. Andrea oversees Idealware's fundraising and training activities, including live and online seminars, curriculum development, sponsorship and corporate and individual giving. She is also Idealware's resident expert in social media tools and techniques. Prior to joining Idealware, Andrea held fundraising positions in education, health research and museums and has taught math, performing arts and history in traditional and non-traditional educational settings.

Laura S. Quinn, Idealware. As Idealware's Executive Director, Laura directs Idealware's research, writing and training to provide candid reports and articles about nonprofit software. Prior to Idealware, Laura founded Alder Consulting, where she helped nonprofits create Internet strategies, select appropriate software, and then build sophisticated websites on a limited budget.

Lisa Colton, Darim Online. As the Founder and President of Darim Online, Lisa assists Jewish organizations in their efforts increase their professionalism and relationship-building capacity through the effective use of technology. Lisa's work experience includes teaching and curriculum development, Jewish education and communal development, and extensive experience in design and publication of community directed media. . She has a deeply held passion for Jewish education and community building, and has personally contributed to many Jewish education efforts in Seattle, San Francisco, Israel, Virginia and Vermont.

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 provided by the firms. Conduct your own due diligence before hiring any firm.

NEW ENGLAND	
Nonprofit MediaWorks 	www.nonprofitmediaworks.com Bristol, CT Helping Connecticut nonprofits achieve social change through creative, cutting-edge strategic communications. Providing social media strategy and training, earned media, e-mail and technology solutions. Carol Buckheit, 860-402-9780 or carol@nonprofitmediaworks.com
Another Jennifer Writing Lab	anotherjennifer.com Brunswick, ME Jennifer Barbour, 207-653-4542 or jennifer@anotherjennifer.com
Arthur Fink Consulting	www.insightandclarity.com Peaks Island, ME & Portland, ME Arthur Fink, 207-615-5722 or arthur@arthurfink.com
Talance, Inc.	talance.com Woburn, MA Monique Cuvelier, 888-810-9101 or info@talance.com

NEW YORK & NEW JERSEY	
Big Duck 	www.bigducknyc.com Brooklyn, NY Getting your community to connect to your mission is essential. Big Duck combines strategy and creative to help nonprofits address communications challenges and leverage social media opportunities. Sarah Durham, 718-237-9551 or hello@bigducknyc.com
Darim Online 	www.darimonline.org New York, NY & Fair Lawn, NJ Darim Online provides social media and leadership training and consulting to Jewish organizations, helping staff and boards increase their effectiveness in a networked age. Lisa Colton, 434-977-1170 or info@darimonline.org

NEW YORK & NEW JERSEY

Egan Consulting



www.eganconsulting.com

Brooklyn, NY

Extensive experience in nonprofit management. Deep collaborative energy is what I offer. Social media strategy is critical to ensuring the successful commitment of limited resources.

Margaret Egan, 917-952-2556 or megan@eganconsulting.com

HowardYermish.com LLC



www.howardyermish.com

Mount Laurel, NJ

Howard brings enthusiasm and understanding to the world of technology, going beyond just “gee wiz isn’t this cool.” Internet strategy and marketing, web-site development, speaking and private training.

Howard Yermish, 856-316-7510 or howard@howardyermish.com

Internaut Consulting



internautconsulting.com

Woodmere, NY

Clients of our strategic, grant support & social media practice benefit from over 2 decades of hands-on, insider experience managing successful global IT initiatives for foundations and nonprofits.

Jonathan Peizer, 516-374-6538 or jpeizer@internautconsulting.com

Spiral Station



www.spiralstation.com

Cherry Hill, NJ

We help nonprofits create effective online marketing systems using Internet Marketing, Email Marketing, Search Engine Optimization and Social Media Marketing strategies and tools.

Ilene Hass, 215-663-0706 or ilene@spiralstation.com

Web Bullie



www.webbullie.com

Chester, NY

We “bullie” our way through your competition by using powerful online, mobile and social media marketing platforms to get traffic, leads and raving fans to your site.

Anthony D’Amico, 845-774-6268 or webbullie@gmail.com

WebServes



www.webserves.org

New York, NY

WebServes is a nonprofit technology service provider delivering comprehensive web and internet technology-related services, ranging from social media marketing strategy to web design & development.

James Bradley, 212-431-1387 or info@webserves.org

Ozmotic Media

ozmoticmedia.com

Brooklyn, NY & New York, NY

JoAnn Kawell, 646-602-0447 or j.kawell@ozmoticmedia.com

NEW YORK & NEW JERSEY

Techs4Good

techs4good.org

Lindenhurst, NY & Forest Hills, NY

Dawn Khan, 646-593-7198 or info@techs4good.org

MID ATLANTIC

Balance Interactive



www.balanceinteractive.com

Springfield, VA

Balance Interactive helps non-profits and other clients to create websites and other online tools that help them to reach organization goals, target key audiences and achieve measureable results.

Tracy Betts, 703-451-8675 or tracy.betts@balanceinteractive.com

Beaconfire Consulting



www.beaconfire.com

Arlington, VA

We help nonprofit organizations that serve good causes accomplish great things on the Internet. We design and build Web sites and craft online campaigns that make people care—and act.

Michael Cervino, 703-894-0080 x222 or michael.cervino@beaconfire.com

Handy Social Media Checklist

- Set clear objectives & solidify your policies
- Define your key metrics to measure those objectives
- Build your presence and cultivate your network
- Experiment, listen, measure, and adapt

What Beaconfire does every day.

Defining social media efforts that will have an impact on your constituents make a difference for your organization. Whether Facebook, Twitter, YouTube, the blogosphere, your site or private community – or all of them, Beaconfire creates social media endeavors that move your agenda forward.

Connect with us to learn more about social media results that shine. beaconfire.com.

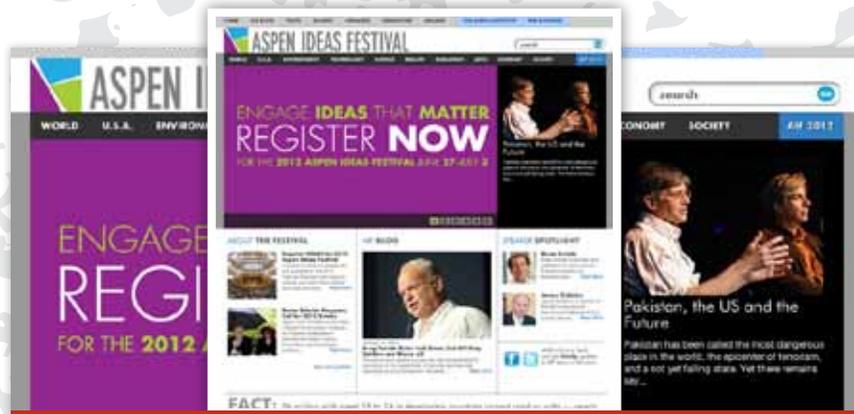


2300 Clarendon Blvd, Suite 1100 Arlington, VA 22201
info@beaconfire.com | 703.894.0080



WE BUILD MISSION-DRIVEN WEB SOLUTIONS

- » Online advocacy campaigns
- » Complex, data-rich websites
- » Award-winning user experience and design
- » Over 100 Drupal, WordPress implementations
- » Specializing in online collaboration and community building



www.aifestival.org

LEARN MORE AT **FORUMONE.COM**

MID ATLANTIC

Cathexis Partners



www.cathexispartners.com

Washington, DC

Cathexis Partners helps non-profits raise funds, expand house files and spread the word about their mission. We specialize in website development, social media integration, and database management.

Mark Becker, 773-274-0769 or mark@cathexispartners.com

Contextual Corp.



www.contextualcorp.com

Washington, DC

Delivering best-of-breed, hosted, integrated, seamless solutions for Collaboration Management, Content Management, & Member Management to non-profits, associations, and government..

Ken Wasetis, 847-356-3027 or info@contextualcorp.com

Darim Online



www.darimonline.org

Charlottesville, VA

Darim Online provides social media and leadership training and consulting to Jewish organizations, helping staff and boards increase their effectiveness in a networked age.

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

MID ATLANTIC

<p>Rootwork.org</p> 	<p>rootwork.org Philadelphia, PA Rootwork.org powers grassroots networks from the bottom up, working specifically with activists for social change. We're grounded not only in tech, but in social movement theory and experience. Ivan Boothe, 202-730-9465 or info@rootwork.org</p>
<p>SocialFish LLC</p> 	<p>www.socialfish.org Washington, DC Social media strategy, infrastructure and governance. Help with hiring for social media positions, policies, workflow, crisis comms, strategy. Best for orgs with 20+ staff. Maddie Grant, 202-713-5343 or maddie@socialfish.org</p>
<p>Spiral Station</p> 	<p>www.spiralstation.com Elkins Park, PA & Reading, PA We help nonprofits create effective online marketing systems using Internet Marketing, Email Marketing, Search Engine Optimization and Social Media Marketing strategies and tools. Ilene Hass, 215-663-0706 or ilene@spiralstation.com</p>
<p>The Center for Association Growth</p> 	<p>www.tcag.com Washington, D.C. We are an association management company that offers a family of proven management and technology solutions designed to support and grow associations and nonprofits in a Web dominated world. Brett Wangman, 847-657-6700 or brettw@tcag.com</p>
<p>Trellon, LLC</p> 	<p>www.trellon.com Washington, DC Thoughtful, effective solutions for organizations tackling real world problems. Michael Haggerty, 877-661-1862 or mhaggerty@trellon.com</p>
<p>Fission Strategy</p>	<p>www.fissionstrategy.com Washington, DC Rosalyn Lemieux, 202-640-1769 or info@fissionstrategy.com</p>

SOUTH

<p>Cathexis Partners</p> 	<p>www.cathexispartners.com</p> <p>Clermont, FL</p> <p>Cathexis Partners helps non-profits raise funds, expand house files and spread the word about their mission. We specialize in website development, social media integration, and database management.</p> <p>Mark Becker, 773-274-0769 or mark@cathexispartners.com</p>
<p>Professional Mojo - Marketing</p>	<p>www.ProfessionalMojo.com</p> <p>Douglasville & Atlanta, GA & Birmingham, AL</p> <p>Lee Brogden Culberson, 678-561-6656 or Lee@ProfessionalMojo.com</p>
<p>The Coudrain Group</p>	<p>www.thecoudrain.com</p> <p>Mandeville, LA</p> <p>Lauren Coudrain, 985-377-9767 or lauren@thecoudrain.com</p>

MIDWEST & MOUNTAIN

<p>Cathexis Partners</p> 	<p>www.cathexispartners.com</p> <p>Chicago, IL</p> <p>Cathexis Partners helps non-profits raise funds, expand house files and spread the word about their mission. We specialize in website development, social media integration, and database management.</p> <p>Mark Becker, 773-274-0769 or mark@cathexispartners.com</p>
<p>Contextual Corp.</p> 	<p>www.contextualcorp.com</p> <p>Chicago, IL</p> <p>Delivering best-of-breed, hosted, integrated, seamless solutions for Collaboration Management, Content Management, & Member Management to non-profits, associations, and government..</p> <p>Ken Wasetis, 847-356-3027 or info@contextualcorp.com</p>
<p>Firefly Partners</p> 	<p>www.fireflypartners.com</p> <p>Boulder, CO & Chicago, IL</p> <p>Firefly Partners is a client-centric team made up of experts in nonprofit best practices. Focused on small to midsized organizations, Firefly offers a wide array of design & development services.</p> <p>Jen Frazier, 303-339-0080 or info@fireflypartners.com</p>
<p>Rootwork.org</p> 	<p>rootwork.org</p> <p>Clarkdale, AZ</p> <p>Rootwork.org powers grassroots networks from the bottom up, working specifically with activists for social change. We're grounded not only in tech, but in social movement theory and experience.</p> <p>Ivan Boothe, 202-730-9465 or info@rootwork.org</p>

