Creating a Social Media Policy
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Introductions

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The Value of a Policy

Why Create a Social Media Policy?

- Creates comfort level and clear guidelines.
- Empowers staff to act.
- Establishes an emergency plan.
- Gets everyone on the same page.
- Helps you think through the issues.
- Gets a conversation started about using social media effectively.
The Journey Is Half the Value

The conversations with your team to define your issues, objectives and priorities is as valuable as the actual written plan.

Obstacles to Social Media Maturity

• Fear
• Allocation of Resources
• Values
• Getting Everyone on the Same Page

Value the Process

PROCESS can be even more valuable than PRODUCT!
What Are Your Goals?

What does this policy mean for your organization?

Where Do You Fall On The Spectrum?

Tactical: Spell everything out!

Vision: Strategy doc to help others make decisions!

Legal: Lawyers lead the charge.

Informal: Informal guidelines for staff.

For key personnel only.

Everyone will read and understand.

Recruit Your Policy Team

Recruit 3-6 team members...

Communications Staff
Fundraising Staff
Social Media Manager
Executive Staff
Values Direct Policy

Start With Your Values

Based on your mission or brand, define a set of terms that can help steer your brand.

Determine Your Social Media Values

From these values, create guidelines to use when posting...

<table>
<thead>
<tr>
<th>Value</th>
<th>What does this mean for your presence in the social media world?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsiveness</td>
<td>We will focus on listening to what others are saying in our community and make a priority to respond in a quick and informative manner.</td>
</tr>
<tr>
<td>Impartiality</td>
<td>We will not take a stance on political issues in our posts nor offer recommendations that are not grounded in facts.</td>
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</table>
Brain Work: What are your values?

Building Your Policy Step By Step

Planning
What Should You Say?

Make your posts related to your values:
• What is totally within bounds?
• When is it okay to post outside of your guidelines?

What Should You NOT Say?

• What requires approval to post?
• What is taboo?

What to Post?
Charles & Lynn Schusterman Family Foundation

They ask themselves, does my post:
• Share Foundation expertise.
• Expose grantee work to a broader audience.
• Expose grantees to broader ideas.
Does it touch on sensitive advocacy issues?
Responding to Positive (and Neutral) Things

• When do you respond?
• Who should respond?
• What do you say?
• What are the implications?
• How is this connected to your brand?

Responding To Negative Things
Should you limit or moderate discussion within your community?

• Will hurtful comments damage your community?
• Where might people say these things instead?
• Will it let you show how responsive you are?

Consider the actual damage that will be done.

Would You Respond?

It Gets Better Project

Jane Kosinski: Eh, why not use any kind of special license plates at all... Can't license plates just be for identifying, not expressing an stance on various social and political issues? That's what bumper stickers are for...

Derick Kennedy: I can't believe how stupid and closed minded people are! There's more important things to spend time on than license plates.

Kimberly Carr: If you need the article, it states that the sale of the specialty plate provides tens of thousands of dollars to the NGLCC, which is a youth group that's been helping LGBT youth, not to express an stance on a social issue. That puts the license plate in the same category as specialty plates that help provide funding to children's hospitals, animal shelters, education, environmental groups, and other good causes. Should those plates be banned also?

[Social media comments and interactions]

[Article link]
Guidelines For Your Community

Define a Plan

Define a set of operating procedures as to when you should respond.

Strategy
Privacy Issues

What are your potential privacy issues?
• HIPAA?
• Safety or Protection?
• Sensitive Services?

Posting and Privacy Issues

• What can you post?
• What can you only post with permission from those included?
• What can you never post?

What Should You Keep Private?

[Image of people and text: Rosie's Place]

Rosie’s Place

Today Rosie’s Place guest was with Nabil Montalvo of Hope for Families, to discuss how to take political action to advocate for more housing assistance programs in Massachusetts. Next up? In a few weeks, our guests will be talking about what they learned today to the halls of the State House to lobby their elected officials.

Rosie’s Place

Wonderful piece on Pro21! Last night about Rosie’s Place and guest profile. She is a 35-year-old mother of three and we are proud of her accomplishments.

Local women share their story of success at Rosie’s Place.

Rosie’s Place

Founder Uzma Iqbal stopped by Rosie’s Place this past Sunday to celebrate the 37th year of the founding of Rosie’s Place!
Personal vs. Professional: Ownership
Be clear about who owns content and accounts...

Personal vs. Professional: Posting
What is NOT okay to post in each circumstance?
• Posting as the organization on organizational account
• Posting as individual on organizational account
• Posting as an individual on individual account

Personal vs. Professional: Relationships
Can staff befriend board members, volunteers, clients?
Case Study: The REACH School

Action:
Teachers were using Facebook to directly communicate with families outside of school hours.

Fear:
Special education has become a highly litigious field. Is there a potential liability issue from the Facebook interactions?

What would you do?

Talking It Through:
What would you do?

The Effects of Drawing a Hard Line

Teachers cannot friend parents (past or present) on Facebook.

There was required “de-friending” of existing connections.

Benefit:
- Protection against privacy issues

Loss:
- Connection to current community
- Connection to alumni community
- Ability to mentor families and respond to issues informally
Policy Adoption

Don't forget to tell people about your policy. Inviting exploration and discussion of the policy will encourage adoption.

Policy Introduction

People will follow the policy if:
• You explain how to follow it
• It makes sense to them
• They feel ownership over it

Policy Adoption...Give Staff Ownership
Train Users

Training is a critical step. It doesn’t matter how much of a step forward your policy is for the organization if no one knows how to use it.

Let People Know How To Use Your Policy

For Homework…

http://www.idealware.org/reports/nonprofit-social-media-policy-workbook

Taking it further… Assemble your policy team and start the conversation.
Questions?