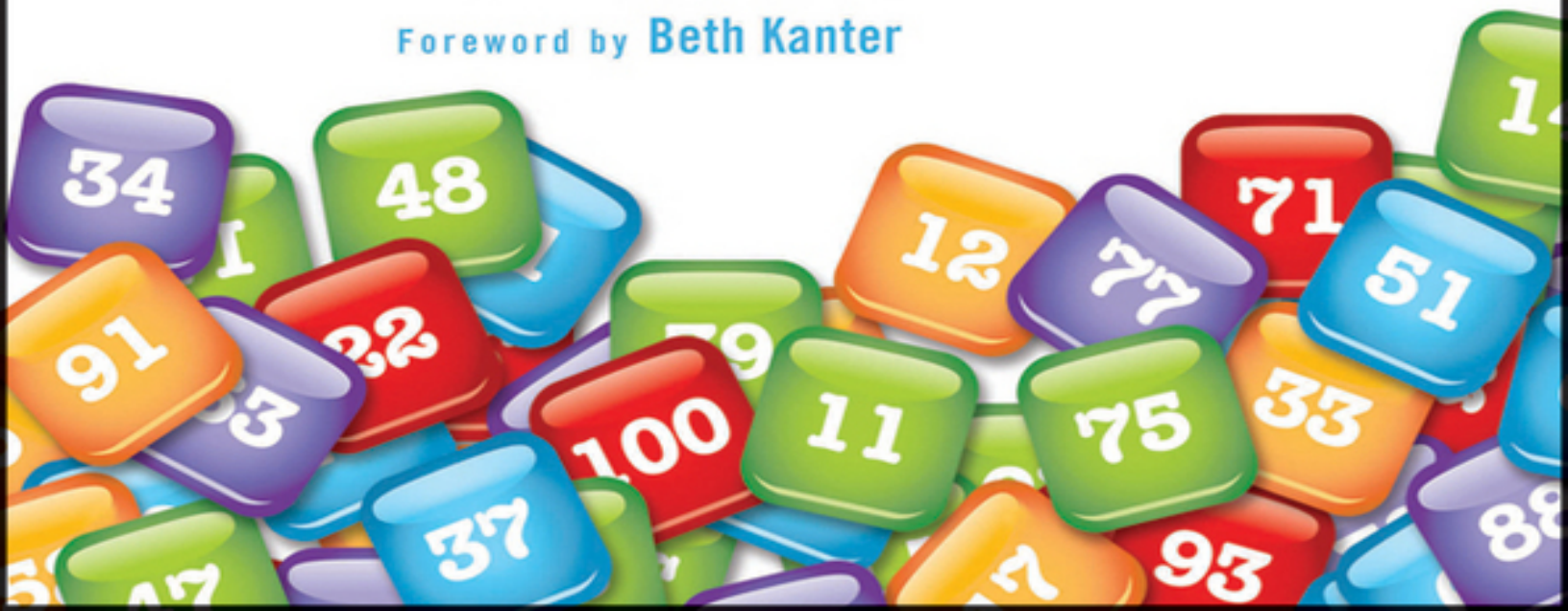
101 SOCIAL MEDIA TACTICS FOR NONPROFITS

A FIELD GUIDE

MELANIE MATHOS AND
CHAD NORMAN

Foreword by Beth Kanter



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101 Social Media Tactics for Nonprofits

A FIELD GUIDE

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We dedicate this book to all the do-gooders out there—the nonprofit professionals who are taking risks, following their hearts, and coming up with some of the most unique, inspiring, and authentic social media communications anywhere.

Foreword

I have spent the last 32 years working in, for, and with nonprofit organizations. Most of that time has been spent helping nonprofits think about strategy as well as the mindset changes and skills required to embrace new online technologies to support their mission-driven work. As I witnessed the birth of the World Wide Web in 1992 and later Web 2.0, nonprofits often face challenges adopting new tools because it requires taking the time to acquire and internalize new skills.

When I started blogging in 2003, blogs and nonprofit social media use were only in their infancy and nonprofit leaders typically viewed them with a high degree of skepticism about their value. This was one of the main reasons I wrote the book *The Networked Nonprofit* with Alison Fine because I wanted to help the millions of staff people and board members of nonprofit organizations, get over the fear of change and make their way into this new, social world.

The Networked Nonprofit was aimed at helping nonprofit leaders take those first steps to be successful managing social change today in an age of connectedness and to pave the way for organizational adoption. It walked nonprofit leaders through the process of transitioning their thinking and orientation from managing organizations to participating in and managing social networks. But that is only halfway down the path to successful outcomes.

In my role as Visiting Scholar at the David and Lucile Packard Foundation where I am studying the interaction of social media, networks, and nonprofits, I have the honor of working with scores of nonprofits who no longer question whether or not to embrace social media and online networks, but how to do it effectively.

My capacity building, coaching, and training work with nonprofits uses a “Ready, Set, Go” framework. The “Ready and Set” involves identifying who they want to reach, articulating clear and measurable results, and an integrated communications strategy. The “Go” is the implementation where I provide coaching and time-saving tips—much like the nuggets provided in this book. Putting a new way of working into practice can be difficult, but having practical, time-saving tips can make all the difference in the world.

I know how difficult it is to make the leap into effective practice with a new technology tool. In 1992, the New York Foundation for the Arts hired me to serve as the network weaver for ArtsWire, an online network of arts organizations and artists. ArtsWire was an online community that allowed both artists and arts administrators to use the Internet to connect with one another, but also learn how to use online communications technology to support their missions.

As the Internet became more mainstreamed, my job changed dramatically—from providing ongoing technical support in using the online community platform to providing training in strategic online technology plans. As the World Wide Web opened up the possibility for any nonprofit to have a web presence and use e-mail instead of fax machines, I was also responsible for designing and delivering trainings to nonprofits on these topics. I taught hundreds of workshops to thousands of arts organizations to help them establish their very first web site, use e-mail to connect with supporters, take the first foray into online fundraising, or how to use search to find information online.

When I started the work, I didn’t know a modem from a microwave. While I was lucky enough to be given a front row seat in the creation of a new field for nonprofits—using the Internet to increase the impact of their work, I was not a natural-born techie. I had the passion to learn, but when I taught myself I would often fail and it would result in hours

of wasted time. What helped me was working side by side with a small group of Internet geeks who generously and patiently showed me all the shortcuts and shared tips that helped me be more effective helping nonprofits to embrace the Internet.

This book, *101 Social Media Tactics for Nonprofits*, is like having two very tolerant and technologically savvy friends sit down with you and share their wisdom and experience about social media tactics. Melanie Mathos and Chad Norman have patiently and generously shared their best time-saving tips to help your nonprofit get to the "go" of using social media channels quickly and successfully.

Beth Kanter

Author, Beth's Blog (www.bethkanter.org)

Co-Author, *The Networked Nonprofit*

Acknowledgments

I want to thank my husband, parents, sister, and all of my family for their unwavering support of all that I do. Dating all the way back to third grade when my parents let me take computer programming classes for fun, to my sophomore year in college when my mom subtly suggested that I may want to declare a major at some point (which turned out to be journalism), they helped me become me.

I also want send a special thanks out to my writing/geek muses: my Aunt Janice J. Apostolou, a poet and shining light; my husband, Gary Mathos, who makes sure I hear about the latest tech news and am in on the beta; my friend and the co-author of this book, Chad Norman, who conquers fun projects like this with me and helps me explore my inner geek; and all of the many people with whom I've had the pleasure of volunteering. Most of all, I am eternally grateful to my sweet daughter Elyse, who was such a good baby during many, many phone interviews.

Melanie Mathos

They say the nerd doesn't fall far from the tree, so I first want to thank my parents for teaching me to love tech. They encouraged me to creatively explore technology through programming, photography, and publishing—they loved it when I made stuff. Then there's my best friend and wife Jennifer, who has always led me out into the waves. I couldn't have finished this project without her daily support, encouragement, and inspiration. But I'm most thankful for my greatest creations of all time, Cooper, Graham, and Zoe, who keep me motivated to not only do good, but to do it all.

I also ned to give a shout out to Mary Colson, George Huffman, Kevin Swan, Raymond Minnis, and Steve MacLaughlin for putting me on the right path at the right

time. And a million thanks to my friend and co-author Melanie Mathos. I’m glad our lives will forever be linked by our nptech geekery and willingness to take on insane challenges like writing this book.

Chad Norman

Introduction

There are a lot of books about social media strategy—this isn't one of them! *101 Social Media Tactics for Nonprofits* features 101 actionable tactics that anyone managing or supporting a social media program for nonprofits can start using today—and most of the featured resources are free.

First, before you go any further, we're assuming you have a social media strategy in place . . . right? Experimenting with social media is fun and exciting (and can be a great way to kill some time), but it's key to start with a well thought-out plan that supports your organization's overall marketing, communications—and yes—even your fundraising strategy. (We know, we know, it's hard to imagine a day when development and marketing actually work together, but it is happening right now as we speak at some of the nation's most successful nonprofits!)

So where do the tactics fit in? Borrowing from the POST method (a systematic approach to social strategy from *Groundswell* authors Charlene Li and Josh Bernoff),[1] in its most simple form, a social strategy should consist of a four-step approach:

1. **P**eople—Where are your constituents engaging and how can you best reach them?
2. **O**bjectives—What do you want to accomplish?
3. **S**trategy—What do you want things to look like when you're done?
4. **T**echnology—How are you going to get there?

Tactics fit in nicely with technology—and that's where we are fast-forwarding to with *101 Social Media Tactics for Nonprofits*. If you haven't conquered the first three steps, don't cheat! Find your people, determine your objectives,

and create your strategy, and then when you are ready to dive in, pick up your trusty field guide, and get to work.

Using This Book

Each of the 101 tactics are numbered and broken down into five key areas: Setup, Communicate, Engage, Fundraise, and Measure. Each tactic will explain the steps and tools needed to implement it, and many are accompanied by a real-life example of a nonprofit using the tactic. You'll read how leading nonprofit professionals around the world are leveraging social media to engage constituents, communicate their causes, and deliver on their missions.

If you have a strategy in place, you can use the Tactic Checklist to find social media ideas that meet your goals. It's like a formula—pick a desired outcome then choose the tactics needed to make it happen. The numbers make it easy to flip through this field guide and find the tactics you need. Here are three examples of strategic outcomes and the tactics that can help make them a reality:

- Connect with your local community: 3, 4, 21, 22, 25, 60, 61, and 86
- Raise more money for your organization: 77 through 90
- Increase traffic to your organization's web site: 11, 14, 23, 26, 28, 32, 38, 44, 48, 93, and 94

These groups of tactics will form the framework of your plan, giving you a method to your social media madness. Read about each tactic you have identified, decide if it will help you meet your goals, and get started.

As you work your way through the field guide, you too will be able to make an immediate impact on your organization's social presence and engage with supporters in new and inventive ways. Pretty soon, you'll be a social media guide, serving as a mentor to up-and-coming social-medialites!

The learning never stops. Visit our web site, 101socialmediatactics.com for online resources and additional tactics.

Tactic Checklist

Setup

- ❑ 1. Claim Your User Name on Facebook
- ❑ 2. Brand Your YouTube Channel
- ❑ 3. Claim Your Venue on foursquare
- ❑ 4. Create a Branded foursquare Page
- ❑ 5. Create a Custom Twitter Background
- ❑ 6. Brand Your Facebook Page
- ❑ 7. Add Multiple Administrators to Your Facebook Page
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- ❑ 9. Allow Supporters to Post Content on Your Facebook Page
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- ❑ 19. Create Twitter Lists
- ❑ 20. Display Names of Staff Contributing to Twitter and Facebook
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[1]Josh Bernoff, "The POST Method: A Systematic approach to social strategy," December 11, 2007, http://forrester.typepad.com/groundswell/2007/12/the-post-method.html.

CHAPTER 1

Setup

The beginning of every social media journey is an exciting time, whether you've been tasked with creating a program from scratch or adding a new twist to an existing one. The low barrier to entry of social platforms means nonprofits can begin engaging their supporters right away, so making sure things are in order from the start can make a big difference.

Before you take your organization and supporters on this journey, it's important to get things set up properly. In a perfect world, you'll already have a strategy in place, a social media policy rolled out to your staff, and all of your accounts created and beautifully branded. Since that isn't always the case, it's always a good idea to look at how other nonprofits have setup their programs.

Tactics like branding your Twitter page, setting up your Facebook uniform resource locator (URL), integrating social media into your web site, and other topics covered in this chapter will ensure a better social experience for your supporters and make life easier for your organization. Think of these setup tasks as the first few steps on the journey—steps you need to take in order to reach your final destination.

Even if you've already started the journey, it's always a good idea to look back, review, and refine the social experience you're providing. Sometimes a nonprofit will start a social program simply because someone told them they needed to, and this can lead to wrong turns. This chapter will help you stay on track and get the most out of your social media efforts.

Are you ready to begin? Let’s go. . .

1️⃣ Claim Your User Name on Facebook

Creating a unique user name allows you to promote your Facebook presence via a short URL. Instead of saying “find us on Facebook,” you can provide potential supporters with a link that leads them directly to your page. This comes in especially handy in conversations and print marketing materials. With the ever-expanding world of Facebook, be sure to grab your unique URL as soon as possible, before someone else does!

What You Need

A Facebook page with at least 25 likes

How to Do It

1. Visit facebook.com/username.
2. From the interface, choose which page you would like to select a user name for.
3. If your desired name is not available, try and try again—maybe an acronym will work instead!

A Closer Look

Things you should know about Facebook user names:

- Make it easy to remember. Think clear, descriptive, and simple when selecting your user name. If you have a Twitter account, you should consider using the same handle. If your organization’s name is long, you may want to use an acronym (if it is easily recognizable.) Generic words like “flowers” or “pizza” are not available for use at this time.

- Make sure you are 100 percent positive that the name you choose is the name you want forever before you click “Confirm.” Changing your Facebook user name once submitted is not an option, even if you misspelled it.
- Usernames are not transferable. This is a good thing! It protects Facebook from the creation of fake accounts and protects users from “squatters” who are merely setting up an account to claim a name and retain it for future use or sale.
- Facebook has a process for protecting intellectual property rights. If you go to select your user name and it is already taken, the only protection you have is if you are the legal trademark owner for the term. Facebook offers a user-name intellectual property-infringement form that you must fill out to reclaim your name.

Brand Your YouTube Channel

If your nonprofit is using YouTube to host videos and engage supporters, taking the time to brand your organization’s channel should be part of the plan. You may be posting your videos on Facebook or your blog, but people will still be visiting your YouTube channel. That’s why it’s so important to have your organization’s brand well represented. YouTube offers additional branding options through its Nonprofit Program that can turn your channel into a great destination.

What You Need

A YouTube account, a YouTube Nonprofit Program membership, and someone to design your graphics

How to Do It

1. Create a YouTube account for your organization if you haven’t already done so.

2. Apply for YouTube's Nonprofit Program by visiting www.youtube.com/nonprofits, and pressing the "Apply" button.

3. Determine the overall look and feel of your YouTube channel, including incorporating your organization's branding, colors, and so on.

4. Design the header, avatar, and background.

5. Go to "Channel Design" and change the colors and modules you want to use on your channel.

6. Access the "Branding Options" section of your channel and upload your icons and banners.

A Closer Look

A well-branded YouTube channel can be an important social media outpost for your organization, so take the opportunity to make it look as professional as possible. The YouTube Nonprofit Program provides many benefits, several of which involve branding and design.

Once your YouTube channel has been accepted into the Nonprofit Program, you can begin customizing your channel. YouTube's Channel Design section will help you set the colors and styles of your channel, which should match your organization's web site and branding standards as closely as possible. You can then upload custom icons, backgrounds, and banners to complete the design.

Because there are so many ways you can customize your YouTube channel, be sure to look around at what other nonprofits have done. Imitation is the sincerest form of flattery, right? Here are four nonprofits that have well-branded YouTube channels that you should check out:

- United Way Worldwide has a really solid, great-looking channel. It features a header linking to its web site, perfectly matched styles, and a great youth-focused background image. www.youtube.com/unitedwaypsas

- Boys and Girls Clubs of America takes a simple approach with its channel, featuring a design that matches its web site. A current campaign is featured in the header, which is a great way to encourage supporters to take action. www.youtube.com/bgcastaff
- The Nature Conservancy has a well-branded header on its channel, which also contains two HTML buttons called “How You Can Help” and “About Us.” A Google Checkout donation option is also included near the bottom of the channel, which is another great benefit of YouTube’s Nonprofit Program. www.youtube.com/natureconservancy
- America Jewish World Service has done a great job combining a custom header with the background graphic to create a seamless design. The organization also uses a second banner in the left column to drive traffic back to its web site. www.youtube.com/ajwstv

In the end, you just need to strike a balance between being creative and professional. And while creating a great-looking channel is important, don’t overlook producing compelling videos that people actually want to watch (see Tactic 41).

3 Claim Your Venue on foursquare

Claiming your venue on foursquare is easy to do, and the reason for doing it is just as simple—to become the “manager” of the venue. Once you claim your venue, foursquare offers organizations a free set of tools to help attract and retain supporters. By becoming the manager, you will be able to edit venue information, including name and address, and will also have access to analytics and offer specials. The approval process generally takes 7 to 10 days