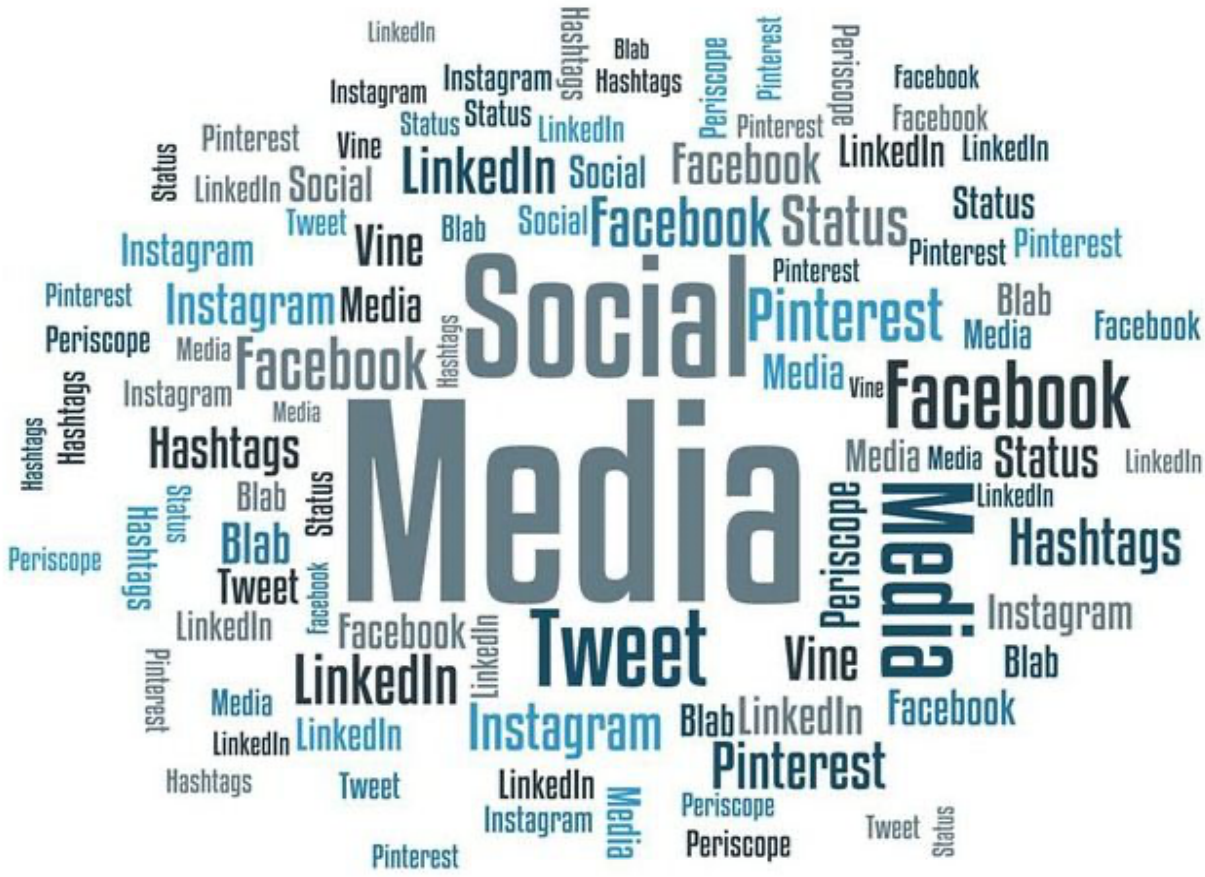
Help and Legal Centre of Northumberland



Social Media Strategy

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Introduction

Having a social media presence is no longer a causal enterprise. The days of delivering a message via legacy media to a large, cohesive audience is a memory. Today's fragmented audiences with its niche or siloed communications channels customized to individual preferences make it impossible. The use of AI (artificial intelligence) based on user preferences or algorithms to decide content delivery exacerbates the situation further.

For those using social media for recreational or entertainment, these factors are annoying but not hugely problematic. It is challenging for businesses, non-profits, as well as any organization or institution to distribute information in a coherent, deliberate manner.

The Help and Legal Centres of Northumberland board are wise to review its social media. Posting information is no longer something that can be done occasionally or simply reposting information from others. It is a sophisticated activity that can be used beyond spreading helpful information about an organization and its events or sharing postings from like-minded groups.

Social media offers an opportunity to find new audiences and enhance existing ones. It can be a chance to create an online community to work alongside a real-world one. It is an educational tool to provide reliable, accurate information or correct and combat misinformation. Social media can be a platform for an organization to be trusted experts, a place where people turn to for credible advice and guidance, and it can be a source of revenue or fundraising.

None of this happens by accident. At the same time, there are no silver bullets or prescribed formulas for instant success. For these reasons, a social media strategy is necessary, if not essential.

The Help and Legal Centre of Northumberland has many options. Rather than prescribe a detailed strategy with specific campaigns, this document is meant to be a resource. Its purpose is to educate and engage the board to become empowered to make strategic decisions based on its resources and aspirations. It is not a Prix Fixe menu but a buffet. The recommendations

contained in the report offer some basic steps but also some mid-level initiatives. It also includes information intended to stimulate debate and discussion.

The Centres are no strangers to social media. The online presence of the Legal Centre began in 2013 with Facebook and Twitter accounts. The Help Centre joined Facebook in 2015. The accounts are active and currently used. The Help Centre has 395 likes and 437 followers as of July 2021. The Legal Centre has 382 likes and 418 followers on Facebook. It has 646 followers on Twitter, plus 310 follows.

This document provides a cursory social media audit. It recognizes the activities currently ongoing. Any comments are not meant as a criticism, instead, to acknowledge what is taking place currently. For an in-depth social media audit to occur, it would be necessary to undertake interviews with the people responsible for content and posting, along with volunteers and board members. This was beyond the resources and the mandate of the authors.

The report is broken into eight sections; Issues and Challenges, Governance, Strategy, Implementation, Maintenance, Conclusion, Recommendation Summary, and Appendix.

The major question baked into the report is one of the resources. Allocating time, money, and people will be central. The report hopes to provide sufficient alternatives to build on the existing efforts, expand and develop additional goals and objectives for a social media strategy that bolsters the Centre’s plans for the future. Once the component parts are in place and a strategy in place with allotted resources then a specific campaign can be developed and implemented.

Understanding how social media strategies work is one of the educational goals of the report. It attempts to provide foundational knowledge about the concepts underpinning a social media strategy and suggests tactics or outlining tools and recommending actions the board can choose to implement. The recommendations are listed in a summary section. However, each recommendation should not be viewed in isolation.

A strategic objective or goal may depend on the proper governance documentation being in place. These can be developed in tandem with the strategy. The policies and protocols are as vital as the actual creation of content and distribution across various platforms. Governance may also include setting up appropriate metrics to ensure analytics can gain insight into the success of a campaign or the need to change it both as an oversite tool and a campaign tool.

A growing number of non-profits recognize the significance of social media in fundraising. Increasingly, organizations are using online transactions to make purchases. The growing number of people spending money online is rising, especially during the pandemic when a few options were unavailable. The report will explore this aspect, providing an overview of what is potentially available.

The report focuses on social media, yet it is impossible not to acknowledge other online tools. There is a small section that addresses the symbiotic relationship between social media and a web presence.

If nothing else, the report is food for thought. It should spawn lively discussion and give fuel to efforts to consider the role of social media within the organization.

Social media is a world unto itself. Its own unique rules and parameters govern it. Social media is complex but it is not impenetrable. Like any country one visits, it takes some time to explore and become accustomed to the local ways. With time and patience, it is less intimidating. Soon, the comfort levels rise sufficiently to see all the marvels and appreciate the locals. The report hopes to assist in this process.

Explaining Social Media

Social media is a general term. Yet, understanding it and its workings can be as mysterious as alchemy.

Definitions:

Social media is a form of interactive technology, both hardware, and software, used to create, share, and exchange information using various media. These forms of media include text, images, audio, video, graphics, animation, along with a host of other mediums for entertaining, business, social, economic, political, and cultural purposes. These platforms are held by for-profit businesses that generate revenue from collecting and selling user-generated data, advertising, and other marketing programs.

Popular social media platforms are Facebook, YouTube, WhatsApp, WeChat, TikTok, Instagram, Twitter, LinkedIn, Zoom, Skype, Snapchat, and Pinterest. This is by no means a complete list, nor is it a ranked list.

In terms of users, the current top 10 worldwide in 2021 are Facebook (2,7 billion users), YouTube (2.3 billion), What's App (2 billion), Messenger (1.3 billion), and Instagram (1.2 billion).

Based on audience share in Canada 2021, the top platforms are Facebook (58%), Pinterest (18%), Twitter (13 %), Instagram (4%), and YouTube (3%).

Immediately, it is striking to note the wide-ranging aims and uses of social media. The diversity of content, the expanse of aims of users, plus the size of audience and market share are genuinely awe-inspiring.

It is all these factors that allow social media platforms to target highly specific audiences. But, at the same time, it creates an ecosystem that is so vast and complex any information can be easily lost in the noise.

Settling on platforms:

The process of determining which social media platforms are best suited to the goals and objectives of the Centre can be simple or complex. Depending on the factors the board is willing to consider will be the basis of any decisions. Choosing the right platform will include target audience, demographics, and personas, among others, combined with specific campaign goals and objectives.

It is straightforward to say the board should stick with Facebook and Twitter. But the question immediately arises as to whether or not these are places best suited for reaching the target audience. If there is a high number of women who use services, then Pinterest can be especially effective in reaching this audience. The same can hold for Instagram, another platform widely favoured by women. Yet, this only covers one aspect in, say, an outreach campaign.

Twitter is well-known as a place where lively discussions and debates occur. In establishing a knowledge/expert campaign, Twitter might be the best choice, even above Facebook. Instagram and Pinterest fall far behind in this case.

YouTube can help distribute educational material via informative videos. These can be readily shared across other platforms like Facebook, Twitter, Instagram, and so on.

Like so many decisions facing the board, there are many balls to juggle. It is not merely deciding to expand to many other platforms only because they exist or seem popular. A TikTok component of a campaign might appear to be a good idea based on its current popularity. However, the user demographic may not be correct, and the resources to sustain a presence on this highly transient and dynamic platform could be too demanding. This may seem obvious, but it is pretty common to see organizations and businesses jump on trends only to find it a waste of resources with little return.

Recommendation: The board should determine which social media platforms to use for its social media campaigns.

Profiles:

Keying in on a particular demographic is both a strength and weakness of social media. The audience description provided stated items were posted that were of interest to "low-income people in our community." The profile provided stated, "anybody who would like to know more about our programs and services – community members, other agencies, government officials, municipalities in Northumberland County."

This is a great starting place for a discussion. At the very least, there is some type of individual being considered as the material is posted. Many organizations barely have this, and, more often, it is based on a gut reaction or impulse.

Successful social media strategies demand a more finely tuned profile of its audience to leverage and maximize the massive power of these platforms.

One method of doing this can be creating a Persona, an imaginary individual who the organization is trying to engage. The Persona description provided stated, "clients, low income, homeless, unemployed, newcomers, single parents, families, seniors, people with physical or mental disabilities, people with low levels of literacy/education." This is extremely useful. And, while it does not describe a single individual, it is a solid starting place for determining an audience profile.

The board may find it helpful to expand both the audience demographics and develop multiple personas for its outreach.

What is most needed is specificity. It should consider age, gender, race, income, locale, and even possible interests beyond the interactions with the Centre. It may also be helpful to look at the demographic of current supporters of the Centre using the same metrics. Are there profiles of those people that could be useful? Finally, think of the various community networks these people move in. Who might be associates, friends, family, trusted individuals with whom these people interact regularly? What is their profile? These additional parameters open a huge possibility for enhancing the "word-of-mouth" aspects of reaching your target audience, plus expand the outreach potential.

Recommendation: The board pursues creating an audience demographic profile and various personas to develop a target audience for social media campaigns.

Regardless of its intended use, social media is transactional by its nature. Participants are asked to "Like," "Follow," "Share," and/or respond to the activity. Without going down the rabbit hole of the techniques and motivations of the developers of these platforms (along with the moral or ethical considerations), it is good to recognize the impulse to act as a fundamental one.

Static vs. dynamic:

A static social media strategy only pushes information to an audience. It demands no action beyond a possible Like or Share. While this is a component of any outreach or educational campaign, it is considered very basic. It does little to develop a meaningful community within the social media world or the real world.

To create an effective campaign, it is necessary to use more techniques to engage the target audience. This can be achieved in multiple and very creative ways. It does not imply simply using negative emotional triggers (although these are very common and get excellent results – hence the incessant harmful and inflammatory content on social media). Positive emotions are equally effective, such as supportive, informative, educational, empathetic, and compassionate content works with equal impact. Successful posts can posit information that triggers responses like "I-didn't-know-that" or "I-need-to-act-now" or "Wow! That is interesting. Tell me more."

This positive emotional environment is the glue that holds together online communities. The feelings of solidarity, understanding, learning, and empowerment are stepping stones. The goal is to move these people to the point of becoming contributing members of the online community created by the organization or by the members themselves. The activity then inspires greater participation by more people. The community takes on a life of its own. The participants and the organization organically generate likes,

shares, and follows. But, like a perpetual wheel, the dynamic interactions keep going independent of any one element.

Recommendation: The board set as one of its goals to build a self-sustaining online community to support the Centre and its activities.

Transactions:

This is sometimes described as the transactional nature of social media. This is achieved by most people using the platforms for recreational or entertainment purposes. It is done through the connections with family and friends and sharing of information, this is achieved.

For businesses, it is the monetary transaction that is most meaningful. For non-profits, the nature of the transaction can be creating community, advocacy, the impetus for collective action, or seeking social justice. It should never be limited to sharing information or promoting events.

The Centre also needs to determine its organizational persona. Unlike the audience persona used to identify a target audience, this persona is the "face" of the organization. In marketing terminology, it is called the brand.

Organizational Persona:

The reason for this concerning a social media strategy is consistency for both the organization and the audience. It allows those who create content to use a set of boundaries to ensure several levels of communication can occur and support clear, concise, and simple communication on the various platforms. It also dramatically enhances the recognition of social media content posted for the audience. This does not imply that every post looks the same, nor does it take away creative innovative content. An individual campaign can and should have its unique characteristics. But the voice, tone, visuals, along with consistent quality, need to be set out. Simple things like articulating the need for an empathetic or compassionate tone for all posts is one aspect. The use of high-quality graphics and images is another. Basics like this can communicate the integrity, professionalism, and commitment of an organization. It can also help in assessing what materials from external organizations should be shared.

Recommendation: The board develops an organizational persona.

Issues and Challenges

One of the most frequent mistakes made when developing a social media strategy is disconnecting the organizational goals and objectives and the activity on social media.

A strategic plan must look at how an organization will incorporate social media into this activity to align its overarching mission, vision, and broader strategic goals with the goals and objectives of its social media.

To achieve this, a strategic plan should complete the following steps:

- Social media audit
- Social media Goals and Objectives
- Budget/Resources
- Tactics
- Tools

Other important aspects to be considered are:

- Content Strategy – outlines types and amount of posts
- Brand Persona and Voice
- Calendar and Key Dates – campaigns, holidays, and reporting periods

These concepts will be developed throughout the report.

Most important is to have a structure that enables a consistent and engaging social media presence.

Beyond the strategy, there are other vital documents. The documentation should include a roles and responsibilities guide to ensure the team knows who does what. It gives the ability to track back quickly when a problem occurs. Equally significant is a crisis management plan detailing the steps taken when a negative or problematic situation arises on social media. Finally, there should be a measurement and reporting plan to determine the impact of social media initiatives. Reports should come before the board regularly, as would be the case for other aspects of the Centre’s activities.

This approach will ensure continual improvement in the months and years to come, plus provide an accountability component and transparency.

Recommendation: The board should create a Roles and Responsibilities Guide, a Crisis Management Plan, and a Measurement & Reporting Plan.

Social Media Audit:

Many organizations and businesses often apply the same principles and practices to the social media that they use on their personal accounts. An individual's use of social media can vary from entertainment to information gathering to maintaining social connections with family and friends. One of the most significant challenges is to shift from this approach to a more strategic, business-like approach.

Social media platforms are used for a variety of purposes. Think of it as a highway. Transport trucks use the highway to move goods. Others use the highway to get to work. Others will use it to travel for a vacation getaway. Still, others use it to get to the hospital in an emergency. But if one stands back, as if one was looking down from a drone, many vehicles are moving along a strip of asphalt. Some of the moving parts are easy to identify – a transport truck, an ambulance, and so forth. But others are not as easy to define, such as a particular make and model of a car.

Social media works similarly. Some of the activity on these platforms is easy to identify, such as a business trying to sell a pair of shoes. But another activity is harder to distinguish. There are cases where this is deliberate. Other times, it is accidental. For a social media campaign to work, it must be intentional. Otherwise, the time and resources put into the social media campaign are no better than spitting into the ocean.

The Centre's activity currently has several characteristics:

- Random
- Promotes its events or events from other relevant agencies
- Impulsive without a specific purpose or goal beyond informing followers
- Limited in scope to Facebook, Twitter

- Little coherence between platforms
- A persona and audience exist, but messaging is not precise
- Little or no call to action
- No metrics

This is not unusual and does not reflect poorly on anyone. It is merely a snapshot.

There are some real positive activities already underway:

- Vital services are provided to the community.
- There is a consistent stream of activity worthy of public notice.
- There are many satisfied clients within the community.
- There are others outside of the clients within the community who support the Centre's activities.
- There is a desire by the board to enhance and develop social media tools to meet strategic objectives.
- Coming out of the pandemic, the role of social media in informing communities, especially in rural areas, is growing in significance. (note: more local businesses are online, more people look for vital information online, especially when booking vaccines, etc.)

There are some challenges:

- Having or allocating sufficient resources to achieve the goal
- Educating all members of the organization about social media and its role in the future
- Developing policies, protocols, and practices
- Technical training

But there are opportunities:

- People are more predisposed to using social media as a place to find and connect with services.
- People are more likely to undertake monetary transactions online as the pandemic has pushed many to buy items online.
- Government, agencies, and institutions recognize the importance of a digital presence and the ability to provide services online.

- Funding to support online activity, especially during and coming out of the pandemic, is available.

Recommendation: The board review and identify current activities, challenges, and opportunities and rank them in order of significance or priority for further reference as the social media strategy takes shape.

Governance

A social media strategy should be developed in tandem with a strong governance structure to guide everyone involved. It is the hallmark between a causal and a professional or business approach to social media.

Assigning roles and responsibilities is the first step. Ensuring sufficient resources is vital for success, including that time, money, and staffing are allotted to the various aspects of the overarching strategy, but also each campaign. But this may not be as simple as uploading a post.

Resources need to be allotted to creating the parts such as drafting powerful wording, choosing images, or creating videos. There should be standards for design requirements for different platforms that are eye-catching and delivers the message clearly, concisely, and simply. Posting can involve A-B testing, a process where posts are slightly altered (say, an image versus a video). Each post is carefully tracked and metrics are monitored to see which one is most effective. Then, this becomes the template to be used for a particular campaign that may be repeatedly replicated and used across various platforms.

Success on social media is never by chance. Even the most detailed planning and efforts can yield mediocre results in the early stages. Flexibility, tenacity, and effort are hallmarks of success. A campaign can be like a perpetual wheel that, as it gains momentum, can increase in its effectiveness. Patterns emerge like videos get more results than images. There can be a need to provide a burst of energy at the beginning to get a campaign launched. Once the effective combinations of platforms, message, content, and design align, the opportunity for success significantly increases.

So, who does what?

Those responsible for social media will need to:

- Create tactics and select tools that directly support a particular campaign;
- Follow best practices by staying on top of key dates and timing;

- Develop content using various text, images, audio, graphics, video, etc.
- Target audiences
- Keep the campaign consistent
- Ensure the campaign and organizational voice is consistent both on and across platforms
- Follow approval protocols for posting
- Monitor metrics and do analytics
- File reports
- Create documentation, reports, and updates

To meet these objectives, the board must make a critical decision: Is it going to use existing staff and resources, or should it have a designated social media person dedicated either part-time or full-time?

How this question is answered is as complex as social media itself. The board may not have sufficient resources to hire a dedicated individual, either part-time or full-time. However, an effective social media strategy can generate revenues through effectively promoting events, fundraising, and increased outreach. There may also be grants and other funding opportunities to be used as seed money available.

Effective social media depends on timing and commitment. It is not merely posting multiple times in a set pattern to maximize exposure. It is also monitoring platforms for opportunities otherwise missed by those who do this work off the side of their desks. For example, a news cycle can quickly generate opportunities for knowledge experts/influencer activity that might be missed. It can facilitate publicity opportunities for earned media (free publicity), meaning greater outreach via local news media or other channels.

Recommendation: The board decides the level of resources allocated to the implementation of its social media strategy.

Roles and responsibilities extend beyond "who does what." It is an excellent practice to have an approval process for all posts. This is known as a Social Media Governance Plan. This can be part of the overall campaign design process, where all posts are created in advance and programmed to be released at designated days and times. Collaborative third-party software, known as collaborative software or a social media management tool, exist

that streamline this process immensely. Hootsuite is one of the best examples and is used by many organizations, corporations, and institutions.

Depending on the significance of the post, it may only need an immediate supervisor for approval. In other cases, a designated board member or senior staff person may need to sign off. The collaborative software allows the posts to be easily shared and approvals provided, expediting the process.

Besides the collaborative software, a clear decision tree is vital to allow posts to be made public in a timely fashion. A Decision Tree is a document that outlines who can post, what they can post, who approves posts, who can take down a post, and other details related to empowering those responsible for direct access to social media accounts and platforms. A Decision Tree is also vital during a crisis. This would be outlined in a Crisis Management Plan.

Recommendation: The board creates a decision tree to formalize its approval process.

Additionally, there should also be a clear set of policies to discourage any behaviours and activities that are not deemed to be appropriate or in line with the goals of the strategy. For example, staff should not engage with hostile customers, criticize any clients or other social agencies or share strategic information. There must also be a detailed statement or policies regarding failing to abide by the rules, such as verbal or written warnings, penalties, or even termination.

Regardless of who is responsible for the task of posting, the use of a social media management tool is worthy of consideration.

Recommendation: The board examines the purchase of a social media management tool such as Hootsuite, plus the appropriate training for anyone involved in the posting or approving posts.

Recommendations: The creation of a policy regarding posting on social media known as a Social Media Governance Plan with clearly stated decision trees, protocols and policies.

Another aspect of governance is approving a specific organizational persona and voice. The Centre should consider how it wishes to "speak" on its social media platforms. Is it a voice of authority? Is it a voice of the disadvantaged? Is it the voice of a champion for the community? How should humour be used, if at all?

A voice should be balanced and authentic. It should not sound heavy, stilted, and ponderous. Rather it should be authentic, natural, and consistent. It should not be flippant, insensitive, or offensive. Some organizations and businesses will go so far as to set out specific words to use and not use. It may seem like micromanagement, but this approach can help to avoid or during a crisis or a problem.

In addition, it should define its audience clearly by review its existing and potential clients, along with the individuals it wishes to reach. This is known as creating a persona.

Recommendation: The board should provide guidelines for voice and persona.

Social media can be the wild west. It can also be similar to swimming in an open septic tank. Negative events or unhappy clients can quickly escalate into a public storm. When this happens, a Crisis Management Plan is crucial. It removes the panic and anxiety associated with these events, giving a set of steps that allow a straightforward, rational approach to decision-making. It blunts the emotion and panic that occurs during a crisis. Crisis planning can include several pre-written responses that can help staff and others address the situation with clarity and a calm approach. It also buys time if the situation is complex.

Part of a crisis plan is to develop a Social Listening Protocol. This involves regular searches of the organization's name and other keywords associated with the Centre and its activities. This can allow intervening early before a situation snowballs into a crisis. Social media management tools can be set up to track this kind of information automatically.

Next, there should be an escalation ladder created as part of the crisis plan going from minor to major. A series of pre-written responses is not only

beneficial, but under the management's discretion, it can be crucial in helping to keep a situation under control. It also provides some guidance around minor incidents.

If an interchange or posting is more consequential, there should be a list of names, emails, and phone numbers. Senior staff or board members should be contacted as the urgency or seriousness of the incident increases. Again, pre-written, pre-approved materials or guidelines can be worthwhile in the long run. These should be easily accessible, and easily understood for which situations the best response can be applied. If it is very serious, then the Chair of the Board may wish to post a response. As well, there could be the need for a template of other reactions to local news media or the community channels that would assist in quelling any crisis. There must be a clear directive about when a posting should come down, and any direction as to when to halt any current campaigns that could be negatively impacted.

Recommendation: The board creates a Crisis Management Plan for social media.

Governance is the due diligence of a social media strategy. One without the other, especially when the Centre is interested in expanding its reach, is inviting a problem.

Strategic Goals

Overview:

The Help and Legal Centre's organizational strategic plan outlined in May 2019 is:

“We envision Northumberland County as a place where all individuals have the resources to meet their basic needs and are empowered to participate in their community in meaningful ways.”

For individuals in Northumberland to fulfill their basic needs and be empowered, they must be informed. Social media can be a powerful tool to help keep people informed. The key is to get the information in front of them. And, while social media platforms would have us believe it is merely as simple as posting, this is not the case. It takes a clearly defined strategy, plus a great deal of creativity and innovation to target an audience, so it receives the information the organization is distributing. These components come together in a social media campaign. A campaign consists of content developed and applied to selected platforms. The campaign must have a set of measurable goals and objectives. Only then can an organization determine how effective it is in getting people to act on the information provided.

Alignment:

Three of the board's strategic objectives apply to social media.

1. Ensure programs are accessible, relevant, efficient, and aligned to organizational mission increase organizational profile and awareness
2. Inspire and support the engagement of stakeholders to build a stronger community.
3. Increase organizational profile and awareness

There are many ways to approach the use of social media to obtain the board's stated organizational strategic objectives. Rather than explore a myriad of options, it is advantageous for the board to focus on a few short

and mid-term goals. Three areas are suggested: Outreach, Knowledge experts/influencers, and Events. A possible fourth area could be Fundraising.

Outreach:

Outreach 1: In business terminology, this would be defined as brand awareness. However, while the Centre is not a business it is still a brand, making outreach a more accurate term and in line with other organizational goals and objectives. In this case, it would be a public education campaign with set targets across multiple social media platforms with associated calls to action. The metrics would be tracked for a possible 5% to 15% increase in traffic with an associated rise in specific metrics for the organization's website.

Recommendation: The board adopts a one-year outreach campaign to increase awareness of its services and other activities with associated calls to action to increase traffic with a target of a possible 5% to 15% increase in specific metrics with key performance indicators to be determined.

Outreach 2: The Centre engages in a wide range of services and activities. The board mustn't be over-ambitious. It should review and pick key programs it wishes to use in a public education campaign.

To do this, the person responsible for posting should then check the annual activities to create a calendar to determine several specific, targeted campaigns. For example, the seniors' tax program. A campaign before and during tax season would be developed to raise awareness of the service and its benefits. A series of posts across social media platforms. The content posted would contain a call to action driving individuals to call the Centre or go to the website to sign up.
Similar campaigns could be designed for other programs. It would be necessary to assess the time and resources for each campaign.

Recommendation: The board or a social media coordinator creates a calendar using several key programs for a targeted campaign over one year, assigning the necessary resources. Specific metrics would be used to measure the performance of each campaign.

Outreach 4: Bringing the Centre’s real-world clients and community supporters online is essential in a social media strategy. This can take many forms. The simplest is to urge clients to join social media platforms as part of service delivery. When a successful service is complete, ask the person in the final conversation or meeting to please join. It makes them feel part of an ongoing community, and they "stay in touch," allowing them to learn more or ask questions or checkin as a follow-up.

Outreach 5: An alternate tactic is to ask followers to share specific posts with family and friends.

Outreach 6: Still, another is to hold a contest or giveaway if people in the community follow the organization's social media accounts. Hosting and sponsoring events can be a very positive way to expand outreach. For example, partnering with a chef to present low-cost vegetarian meals during a webinar can benefit clients and the broader community. Having participants sign up on the website in advance provides valuable contact information for fundraising and outreach.

Recommendation: Explore various tactics to bring real-world audiences into the online world

Knowledge experts/influencers:

Knowledge 1: Knowledge experts/influencer is another important role the Centre can play in the community on social media platforms. Campaigns can be designed around providing valuable information to members of the public using staff's expertise. These types of posts are something the staff currently does. This would be a more organized approach and would involve a planned, regular posting schedule that would be less random. These posts have many iterations, including posts on timely topics at particular points in the year or based on newsworthy events.
It can also be designed as a specific education campaign. For example, information aimed at renter's rights or "how to" posts could involve images or videos to provide simple step-by-step instructions on dealing with common scenarios, like landlord conflicts.
Additionally, these can include calls to action where a link to the website could offer a downloadable document, pamphlet, or poster. These should be

targeted campaigns aimed at specific audiences or personas. Metrics associated with the various social media platforms, plus the website and any downloads, would measure the campaign's impact.

Recommendation: The board and staff collaborate to choose one or two public education campaigns using high-interest topics relevant to a targeted audience. The campaign should tie in both social media and website activity to support a call to action, along with a possible transaction involving some activity on the website. Metrics should be determined and used to measure the campaign.

Knowledge 2: The Centre may wish to initiate public discussion around crucial topics using social media platforms to engage in meaningful debate. As subject experts, the Centre can offer high-quality information to help shape public discourse around critical issues facing the community and the Centre's clients. It has an opportunity to advocate for outcomes, influence public opinion, and policy. This would need to be done in a careful, thoughtful manner. And, while there is always a risk of negative responses in any social media activity, this form can be slightly more precarious. This should not discourage the Centre from trying this approach.
If this strategy is to be pursued, there must be a set of policies and a crisis mitigation plan put in place that is dedicated solely to it. In addition, there has to be a dedicated mediator/watch-person keeping a very close eye on what is being said, posted, etc. to ensure facts and truth, particularly regarding the Centre and its services, are being maintained. A series of governance documents is paramount and should buttress the Centre’s overall social media strategy.

Recommendation: A "how-to" campaign to educate the public on an issue involving a video posted to a social media platform, providing a step-by-step guide on a relevant topic. Metrics should be used to measure the campaign.

Knowledge 3: Also monitoring social media activity can lead to opportunities to offer single or multiple comments offering expertise or introductory information that a discussion may be lacking. Combined with a link to website resources can be highly effective without setting off a hostile barrage. These campaigns build trust, credibility while also increasing the public's awareness of the organization.

Recommendation: Design an ongoing social media monitoring system searching keywords and terms to identify opportunities to offer expertise and information to the public engaged in relevant, timely discussions. Record the interventions. Monitor metrics for social media and the website to measure results. Analyze these to determine the most effective interventions, topics, and information. Build from established patterns to enhance reputation, trust, and credibility.

Recommendation: The board selects several topics to facilitate public discussions and/or participate in existing ones.

Knowledge 4: Events are a mainstay of any organization. From fundraising to online webinars to golf tournaments to annual general meetings, the Centre has multiple opportunities to publicize these events. A social media campaign can increase awareness, solicit donations, create sign-up opportunities and get further information. More often than not, some organizations fail to fully leverage the strength of social media and a website in combination to create highly successful events. Beyond the outreach, an e-commerce configuration or a sign-up form can create a conducive environment for people to act at the moment rather than having to take additional steps beyond receiving basic information.

Recommendation: The board explores tactics to leverage social media to support fundraising beyond simple promotion, including possible e-commerce solutions.

Knowledge 5: Leveraging advocates and others is a helpful strategy. Sharing posts and links to sympathetic or aligned agencies, levels of government, or activist groups can be a springboard to broader audiences. This involves a formal agreement to share information and post on a strategic basis. Rather than simply using informal approaches like sharing relevant information, events, and links, a formal protocol or agreement can expand any message's reach. Hyperlinks from one website to another can be helpful. For example, Northumberland United Way can promote/share events, fundraising, webinars, or other vital information. Meanwhile, the Centre can do the same for United Way. The formality ensures the extension of distribution and reach to new audiences.

Recommendation: To seek formal social media sharing agreements with sympathetic or aligned agencies, governments, or groups.

Knowledge 5: A formal Advocacy Rewards program can encourage the audience to assist in expanding outreach. Advocates are defined as engaged people who follow, share and promote the Centre on a small scale but who have sufficient followers or influence in the community to draw attention to the Centre on social media platforms. An Advocacy Rewards program can range from a simple ask included in an invitation to an event (…and would you please share a social media post about our events on your accounts). It can also be a pre-written, copy-and-paste approach. Advocacy rewards can become as sophisticated as giving away a t-shirt or other prize to people who do an outstanding job of sharing and promoting posts from the Centre. Finally, the Centre can encourage staff to use personal accounts to promote posts via their networks of friends and family.

Recommendation: Create an advocacy rewards program.

Events

Events are a cornerstone of any non-profit organization. Getting a message out to potential participants focuses on a distribution channel. This aspect is touched on at various points within the report. One aspect to focus on is the ability to push people into acting in the moment instead of just seeing the information and responding later. The ability to create a spontaneous reaction is a strength of social media. There are tools to be put in place supporting this tactic.

Events 1: Enhance the Centre's website for e-commerce to support donations and payment for events, fundraisers, and other related activities. (See Knowledge 4). The board should consider an easy-to-use form builder feature to allow sign-up for activities. Newsletters are another method of engaging audiences. Regular communication from the Centre with up-to-date information, notices, program, events, etc. can be an excellent way of reaching out and keeping audiences connected.

Recommendation: The board explores the use of online forms, sign-up sheets, and newsletter apps to enhance communication and fundraising efforts.

Recommendation: The board should pick two or three events to develop related social media and website campaigns using a form or sign-up sheet as a pilot.

Implementation

Once the strategic goals and objectives are in set, resources allotted and governance in place, it is time to implement the campaigns.

Posting:

How many times to post is a difficult question to answer. Besides being a matter of resources, frequency rates are based on objectives. Yet, it is crucial to recognize two key factors: regularity and consistency. A mishmash of varied content posted on platforms randomly or in spurts gains little within the massive flow of information. It also lowers the ranking within the algorithms, leaving the organization at a disadvantage.

A quick summary suggests posting:

- On Instagram, post between 3-7 times per week.
- On Facebook, post between 1 and 2 times a day.
- On Twitter, post between 1 and 5 Tweets a day.
- On LinkedIn, post between 1 and 5 times a day.

Remember, every organization is unique. The best way is to test and analyze results until patterns of success establish a workable protocol.

Recommendation: A series of experiments or pilots are undertaken to test posts, monitor results, and establish workable protocols for posts on multiple platforms.

Having a social media management tool like Hootsuite can be a big step towards efficient and effective posting. The use of the calendar feature means social media campaigns can be a huge help in monitoring, analyzing, and managing posts on multiple platforms.

Content strategy:

Content is king.

It is a tired adage. Yet, it continues to be true. What you say and how you say it is critical to any social media strategy. As anyone will tell you, words are powerful tools. Picking the right ones, especially within the limits of various platforms, is a challenge. Certain "power words" are favoured by experts who look for successful, compelling posts.

Equally important are visuals. Images, videos, fonts, colours, and so forth are another crucial component when posting. These must work together to produce a social media campaign that will elicit spontaneous responses from individuals not predisposed to engaging with the organizations typically.

The use of various mediums sounds easy, but it is not. It is an illusion to think reposting, sharing, and a few original items will keep an audience engaged. While sharing content is a component of any good social media strategy, it is not a replacement for original content that meets the needs of a specific audience identified by the organization.

Successful content will be credible, sharable, useful/fun, interesting, relevant, timely, different, and authentic. Most of these terms are easily understood. The exception is authentic. Nothing turns off audiences on social media than a post that is obviously trying to sell or "beat you over the head" with its message. Think of a party where everyone is enjoying themselves. Suddenly, one person becomes overly severe or loud or "talk shop" when the mood is light and fun. Nobody wants to speak to them.

About one-third of all posts should be promotional. The remaining posts need to take a more creative tact. These can be helpful, informational, educational, demonstrate expertise, fun, stimulate appropriate discussion, etc. Some of the most authentic content can be an employee, volunteer, or other people in a video talking directly to an audience. It can consist of "behind-the-scenes" images or "people-doing-a-job". Even a picture of someone participating in an event, or a client receiving help can stimulate the greatest response. Humanizing posts by including people forms some of the best content.

There is no single formula for content. It is only the unique combination that works best for the organization. Again, it is up to the Centre to decide what the proportion of posts should be and the tone of the content. What is vital

for the Centre is to mix up the content, so it is varied and has a broader appeal as it attempts to reach beyond its current audience.

Recommendation: Posts should experiment with various types of content to measure any impacts.

Timing:

The timing of posts is another factor to be considered. Some social media campaigns will post at 4 a.m. to ensure the content is available when people first log on in the morning. The assumption is the individual reading the post has few followers, and the algorithm is favourable to pushing the content. Others will post at 6 a.m. or 8 a.m., again to be first in the morning before people start their day. Others will try for the end of the day when people are winding down and are more likely to spend time scrolling through content.

Again, there is no set pattern, and it will need to be experimental.

A-B testing and other pilots:

When conducting experimental cycles, it is important to keep track of changes and impacts. Creating notes or charts to measure results is necessary. It is a good idea to change one element for the best results and measure it over a short period of time, like a 24-hour to 48-hour period. Some experts test over several hours and measure metrics. Then change another aspect. Repeat. Do this until all the elements are measured and there are results. This process is known as A-B Testing. Once patterns emerge, these can be formalized. Be cautious. Don’t allow a campaign or a series of campaigns to become too formulaic, as this can bore audiences and followers become complacent.

Visual Content:

The significance of graphics cannot be underestimated. Creative graphic design communicates on multiple levels, consciously and unconsciously. High-quality graphics can distinguish a brand instantly in marketing – as most people know. This is even more true when it comes to outreach

strategies. A consistent look and feel to the graphics, such as logos, colour schemes, fonts, design, and similar factors, will contribute immensely to success. The effective use of images can impact engagement with increases of 100% or more compared to posts without images. Video can have an even more profound effect if done well. Software such as Canva, Adobe Photoshop, or InDesign is only a few of the many valuable tools that can simplify creating compelling posts. These can provide added benefits as some will also have stock images, graphics, and templates to streamline production.

Video falls into this category. Producing videos can be simple or complex, as many of the other technical aspects of social media content. The software can make it feel effortless to create content with templates and features involving a single click of a mouse. A smartphone with a few components can produce good quality videos worthy of posting. However, there may be times when investing in professional video production may be worth the resources.

Power Words:

Social media posts should contain three-word triggers motivating the audience to engage. While cynics may argue this is merely creating clickbait, it is not necessarily true. Click-bait is simply a social media post that does not deliver what it promises. A social media post that leads the individual to applicable, appropriate, timely information that is actionable is not click-bait. The intention of getting someone to take action or be active through a post is a major component of a social media campaign.

Power words consist of language that transforms dull, lifeless posts into compelling reading. A power word triggers a positive or negative emotional response. It is meant to spice up content and compel the audience to take action. It is the springboard, pushing the individual to do something from finding out more about the organization to donating money.

When creating and evaluating posts for campaigns, try using powerful words. Even a pinch of spice can make all the difference in a bowl of stew.

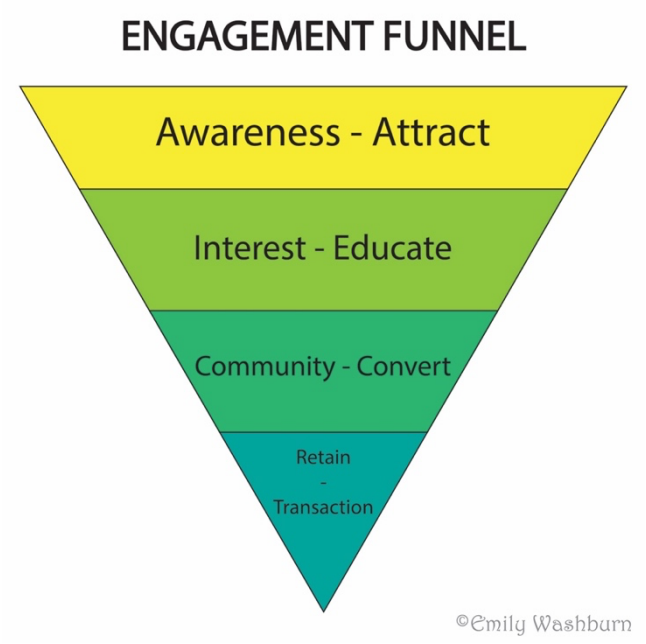
Hyperlinks:

Hyperlinks are another critical feature. Usually, these should involve a call to action. Successful content should always engage the audience. Asking the audience directly to share information or sign up for an event/newsletter or visit a website for more details must be included in almost every post. Not only does it stimulate interest, but it is also a good way of developing an online community.

Engagement Funnel:

Social media is a springboard when developing an outreach campaign. It can be an effective method of stimulating interest in the organization. But, the appeal must be sufficient to move an individual into action. Once engaged, there must be adequate follow-up to bring this person into the organization's community. Once within the community, the next step is developing and expanding the relationship, making it increasingly more profound and more meaningful.

The process is called an engagement funnel. Individuals can enter the funnel at multiple points depending on their interests, experience, predisposition, and desire to learn or engage more.



The Engagement Funnel

- Awareness/Attract
- Interest/Educate
- Convert/Community
- Transaction/Retain

Awareness/Attract

This portion of the funnel is the most basic entry point and the most likely the place where the audience will make its initial contact with the organization.

Like any introduction, it is the "get-to-know-you" encounter. People will have little or no knowledge about the organization, what it does or how it functions. As an entry point, it should drive the individual to the website on a specific page meant to provide basic information and links to help navigate towards more certain content on the website. It should also have contact information and a simple form or email function to facilitate direct connections. A "for more information" format or a "if you would like us to contact you" or similar setup, plus a link to FAQs, is something to consider.

Interest/Educate

This is an educational opportunity. While the Awareness aspect is meant for those seeking basic information, this is the entry point where an individual is looking for specific information. This might be an individual responding to an outreach campaign for a service or someone with an identified need. The call to action will drive the individual to a specific web page to get more detailed information, sign up, fill out a form, download, read a document, watch a video, etc. Implied is the individual's knowledge of their identified need and the ability to discern the organization's ability to meet that need in general or specifically. There is a stronger relationship between this individual and the Centre. The potential to develop the connection between the individual and the organization is higher than the passing interest in an awareness campaign.

Convert/Community

This is where the community building occurs in the funnel. Ideally, a person becomes aware of the Centre and discovers its ability to provide services. Next, the individual recognizes a need to help and connect with the organization to obtain those services through the many programs offered.

Through this encounter, the person will see the value of the service or program through the experience with the Centre online. Often, this is where the relationship ends. However, through social media and other initiatives, the Centre can develop an ongoing relationship. Clients can join an online community that regularly interacts with them. It can be as simple as getting an individual to start sharing posts. But this can further expand to engaging in online discussions, asking questions, answering questions from others, and more.

With time and strategic use of social media in using knowledge or expertise campaigns or community building campaigns, these individuals can become champions and influencers in their own right, spreading information or directing people to the Centre. These people enter the funnel further down and are more dynamic than the others. It should include places on the website for people to engage at this level. Blogs, forums, discussion boards can be tools to use for these purposes. They are the community growing around the Centre.

Transaction/Retain

This is the place of commitment. It is where things of a higher value are exchanged. It can be a monetized exchange, as in the purchase of a ticket to a golf tournament or donating. It can also be offering to volunteer or helping out with an event. Someplace the champions and influencers in this category, as well. It is the place where there is a deep and abiding relationship formed. It is where fundraising strategies on social media are cultivated and end up. The website should have e-commerce abilities to accept donations, do fiscal transactions, purchase tickets, or even an online shop with merchandise (The Help Centre T-shirt or coffee mug).

Recommendation: The board develops an engagement funnel to align with its social media strategy across multiple platforms and the website.

Website:

It is not the mandate of this document to provide a detailed analysis of the website, only social media. However, the website is an integral component. The symbiosis between social media and the website is necessary. Social media can function on many levels and, in some cases, replace functions traditionally found in a website. Still, social media is highly transient and very dynamic. For businesses, this is positive since the idea is to drive the customer towards a monetary transaction or purchase. The sooner, the better. The Centre is engaged in providing services that are not necessarily involving a monetary exchange. Instead, people seek information or require a valuable service (get taxes done, advocate for a tenant, etc.). The board cannot ignore the significance of the website to provide the kind of detailed information and contact.

To this end, the use of three separate websites is problematic. It creates confusion in the mind of the audience, especially if they are unfamiliar with the organization. The need to develop a singular landing place would be highly beneficial. All people want is help. Instead of thinking of a website as a bottle, think of it as a pincushion. A bottle has only one place to allow things to enter and leave. You have to go in through the spout or out. A website is like a pin cushion. You can stick a pin anywhere on the pincushion and it stays. The same is true for people searching on the web. They can enter search terms and enter your website at the exact spot they need for the information. There is no requirement to start at the main page every time.

Recommendation: The board reviews its website, making the necessary adjustments to better align with its social media strategy.

Maintenance

This section represents ongoing activities to support campaigns.

Analytics:

Analytics and metrics are critical aspects of successful social media strategies. For the uninitiated, these terms and figures can be intimidating and mysterious. Even for experts, the statistics, trends, and patterns can feel a bit like reading tea leaves. However, it is possible to determine a lot of practical, significant information to help shape a campaign and measure return on investment (ROI) and return on engagement (ROE), plus provide concrete evidence-based decision-making.

Metrics refers to the numbers the organization will track. Analytics is using those numbers for decision-making. Analytics can determine things like the best times to post all the way to which strategies are making the best return on resources allocated.

The metrics are more vague than most people realize. None are precise. More often these figures represent estimates. People can return to pages within limited timeframes and still be counted as one person rather than the same person returning. It can be confusing.

However, this does not discount the validity of tracking metrics and spending time doing analytics. It is critical to measure performance even in the face of recognized shortcomings.

The following uses the most basic definitions for metrics. These should be useful to the board in its decision-making, recognizing the capacity for deeper, even more significant, more subtle insights used by marketers and social media professionals.

Some key metrics to track are:

- Pageviews: the number of times people came to view a particular page

- Visits/Sessions: the specific period a visitor spends on the site. If they return within 30 minutes, it is not counted a second time.
- Average Session Duration: Amount of time on a particular page or site
- Unique Visitors: first-time visitors
- Hits: All the times a person interacts with various pages within the site
- New vs. Returning Visitors: First time versus returning visitors. There is a time factor involved, and analytic apps use software to detect cookies to determine returning visitors. If someone is blocking cookies, then they will show up as first time, every time.
- Bounce Rate: A person who only hits one page and leaves is measured as a percentage.
- Time on Page: Average amount of time visitors spend on a particular page.

Recommendation: The board implements a protocol where a monthly insights report is presented, tracking the metrics and analyzing performance.

Advocates and Community building:

At the heart of every social justice organization are its advocates. These come in many forms: clients, staff, volunteers, community members, and influencers. Advocacy and community are all about building relationships that engage and empower these people, enabling the Centre to build a following of those who champion the good works across social media and in the community.

Word of mouth is the most powerful advocacy. Recommendations from trusted individuals are one of the best ways the Centre achieves this.

Within a social media strategy, advocacy and community take on different forms. It can include a Staff Advocacy Program, an Influencer Program, and a Community Engagement Strategy.

Building an online community:

The best place to start a discussion about growing an audience is by asking a simple question: "How do I engage followers that might derive value from my online community?"

It is a mistake to look at Facebook and Twitter accounts with high numbers of followers without examining engagement rates. It is surprising to learn how many have huge followings but low shares, replies, or those who use hyperlinks, watch videos, etc. The strategy must take into account not all followers are created equal. It is better to have a dedicated community than a large one that is not interested in what you offer or does not align with the Centre's mission and values.

Choosing collaborators:

Connecting with the right people can also help build the right following. It takes time to search out influencers that are worth time and resources to bring them on board. It means researching conversations and posting within the community. Only then can the people be identified that will help the organization build.

For example, an organic grocer could sponsor a local vegetarian chef to do an event where people could learn how to prepare delicious, healthy dishes economically. The event could be simultaneously done in-person but also broadcast over Facebook Live. Additionally, the event could include an online discussion before, during, and after in a specific Facebook group dedicated to a healthy eating program for low-income people.

While the Centre does not have a food program, it is an example of the integrated approach and use of social media platforms to collaborate for the purposes of growing an audience and engaging the community.

Beyond the obvious:

The Centre already has existing online relationships where it shares information. The potential to expand these beyond traditional social justice groups is worthy of consideration.

Recommendation: The board develops a list of potential businesses and non-traditional organizations/agencies to explore forming mutually beneficial online and real-world partnerships to enhance outreach initiatives.

Engaging Social Media Communities:

The Centre already interacts with people online. Yet, one of the great strengths of a social media community is the ability of the community members to interact with each other.

As one of its goals, the board should consider encouraging active participation, welcoming questions, conversations and discussions. Making sure comments are monitored by the organization is pretty apparent, but it is not uncommon to see a lack of two-way communication between an organization and its audience. If any organization hopes to transition from a passive, inert, unengaged group of followers to a dynamic, loyal, interested community of participants, it must make a conscious effort.

This means adopting a proactive engagement position on social media. It implies seeking out and responding to mentions of the Centre, even when it is not tagged or directly alluded to in posts. It means contributing to conversations by answering questions or simply acknowledging someone who is struggling.

Negative sentiments may arise as the organization expands its outreach. The Centre can face constructive feedback, disgruntled or hostile commentary, a pressing concern, or spam. The organization's ability to address this type of feedback with grace and satisfaction is crucial. It may be necessary to take the conversation to private messaging if required to achieve this goal.

This time and resource allocation will turn casual observers into dedicated supporters and advocates for the Centre. The core of any online community is reciprocity. The more time spent providing value to your online community members, the more likely they will return similarly.

Leveraging your Community:

From a social media strategy perspective, the online community can be an ever-growing and changing focus group. It can function as a place to get a deeper understanding of the strengths and weaknesses of your services and organization. Engaging with the community and listening carefully to the topics and comments can give insight into new features or services you might want to develop in the future. It is also possible to cement positive relationships with online community members by seeking input on decisions through polls and questionnaires.

Community members can also create a self-sustaining dynamic online. When questions arise, community members may pipe in with answers, thereby reducing the resources you dedicate to the organization's social media roles. These interactions do not minimize the importance of moderation of social media platforms, but the impact that a trustworthy and knowledgeable online community can make is significant.

A dynamic online community can also keep a keen eye for those who might need services but not know where to go. The ability to refer people can be the same as a word-of-mouth campaign. Passing along leads of potential clients or directing people to various services is a great way to enlarge the online community and enhance outreach.

Finally, you can encourage your online community to create user-generated content through campaigns and content and ideas for upcoming content, asking them what topics they would like to see covered in future social media campaigns.

Recommend: The board develops an online community as part of its social media strategy using various engagement tactics and techniques.

Conclusion

A social media strategy can assist in the board's effort to meet its organizational goals and objectives while fulfilling its vision and mission.

The Centre's current efforts are commendable given the resources available. The parts – the existing accounts and website – provide a solid foundation. The Help Centre and the Legal Centre both have an established presence with a core of loyal followers.

If the board seeks to increase its organizational profile within Northumberland County, it is in a good position to pursue this. It is possible to expand awareness, plus engage stakeholders to build a stronger online and offline community.

In that case, it is reasonable to think a social media strategy could contribute to these goals. It can also contribute to ensuring programs are more accessible through the recommendations, resources, and suggestions in this report.

It may be a bit more challenging to grow funding opportunities on social media. Indeed, the fundraising aspects should not be ignored. The Centre already sells out its Empty Bowls fundraiser, and the golf tournament appears to be popular. However, the capacity exists to undertake online donations and other financial transactions through e-commerce. The board can further explore online fundraising as part of a comprehensive social media strategy.

This report is a resource document. Its goals are to provide touchstones for discussion by the board and staff in developing a social media strategy. Any effort to move forward is predicated on the resources allocated. As identified in the Issues and Challenges section, the board will need to review the strengths, challenges, and opportunities in more depth than can be done in this report.

The organization provides many vital services for the community, plus there is a consistent level of activity worthy of publicity. The existing satisfied

clients indicate there are already champions within the community who can become advocates and influencers online if they are not already.

The timing of this initiative is worthy of special mention. The pandemic lockdowns forced many people, businesses, and services into the virtual world to survive. People's attitudes towards online activity are different coming out of the pandemic. They are already predisposed to using social media and websites at unprecedented levels.

In a June report done by PayPal Canada, Canadians spent more than $2 billion a month shopping online in 2021. An Angus Read survey released in April 2021 came to the same conclusion. Statistics Canada reported the level of e-commerce doubled in 2020.

Statistics Canada also reported in October 2020 that Canadians were spending more time on social media. Across the board, social media use increased by 41%.

At the very least, it means any hesitancy by people to engage online, especially undertaking fiscal transactions, has shifted. The notion someone is willing to undertake a financial transaction online is one of the highest demonstrations of comfort with the virtual world.

For the board, the timing to launch a formal social media strategy is sound.

Priorities:

As the board sets its priorities in developing its social media strategy, it should review its resources immediately. The allocation of time, money, staff, and platforms are the foundation of any further steps.

Baked into this discussion is a decision around the creation of a social media coordinator’s role. Should this be a full-time or part-time position? Should it be an existing staff person or an additional person dedicated to the role?

If anything this report achieves, it could be the recognition that social media is no longer an ad-hock activity done out of a sense that it is "something we should do because everyone else is on social media." Instead, this is an

essential tool for any organization or business for communications, recruitment, awareness, and fundraising. To be a vibrant organization in these current times, a robust, exciting, and consistent presence on social media and online can be transformative.

Once decisions on resources are made, the paths forward are at the discretion of the board. The creation and implementation of the necessary governance framework represent a series of cornerstone documents and protocols. Roles and responsibilities are critical since it outlines the "who-does-what". It will be based on the allocation of resources and the level of commitment the board wishes to make to its social media strategy.

The board can take on the additional tasks of setting out a social media policy, social media guidelines, and a crisis management plan. If there is a dedicated social media coordinator, these documents could be developed and presented to the board for approval rather than the board trying to create them. There are many pre-existing examples available that can be tailored for the organization (see Appendix).

From here, the responsibilities will shift depending on how the board wishes to proceed. It will be necessary to set the goals and objectives the board feels is achievable based on allocating resources to achieve a basic social media strategy. The most straightforward approach might be adopting an outreach campaign and developing a social media presence as knowledge leaders and experts. The goals should be specific as possible with some flexibility for experimentation to determine the most effective and efficient means to educate the audience and drive them into the engagement funnel to build community and retain new audiences.

A suggested strategy might be to use a targeted approach. Each program should have an associated campaign attached to it. The campaign can be done on existing social media platforms used by the Centre or others can be explored. Then, the board could decide which programs it will use as pilots. From there, the campaigns can be expanded until all programs have a social media campaign associated with them.

For example, the free tax services could be a pilot. A campaign could be developed and a calendar schedule created to post before and during tax

season to reach out to the community, encouraging people to use the service.

Other pilots can be developed in the same manner.

It will be vital to measure the performance by the metrics from the platforms and the number of clients who use the service. These statistics can be compared to past years as a benchmark. Also, plan a follow-up strategy to build community and retain connections with clients. Then leverage those relationships of satisfied clients to build awareness further and expand the community.

Once the number of pilots is determined, it would be essential to set up a calendar posting based on 6-month or 12-month timelines. The idea being this should be a sustained effort with regular, timely posts with set goals and objectives that will be measured and reported on to the board. It should be flexible enough to allow experimentation but sufficiently firm to create meaningful metrics. The board should be prepared to meet with both success and challenges. Therefore, the board must be prepared for some frustration, as well as jubilation. The board may be surprised at what works and what does not. There are no silver bullets or one-size-fits-all solutions.

From here, analytics are vital. Each platform provides analytics. Google Analytics is a good tool for the website. Combined, the board can choose some meaningful numbers to help it assess its progress. The depth and interpretation of metrics is a tricky business. The board may decide to track higher-level figures to keep a broad picture. Depending on roles and responsibilities, sub-committees, staff, and the social media coordinator will likely dig down to whatever level is necessary to gain insight and set further directions for specific campaigns.

Training is another component of the basic strategy. Adopting social media management software is highly recommended both for easy and effective use of the various platforms. It also simplifies scheduling and manages approvals quickly and efficiently, ensuring all necessary protocols are followed. Further workshops could involve interpreting analytics, writing for social media, and so forth.

Finally, a review of the website is recommended. While it is not the mandate of this document focused on social media, the website is an integral component of the overall digital strategy. The board may wish to consider a single site with an e-commerce component to complement its social media strategy. Whatever the board decides, it cannot see these two components separately anymore. It should be a symbiotic relationship in the future.

Beyond these basics, the strategy opens up to many possibilities worthy of further exploration based on the board's ambitions. It can develop more sophisticated outreach campaigns. More deliberate efforts to connect with existing followers and acquire more profound and more meaningful relationships are possible. Community building both in the real and virtual worlds takes on new dimensions. Enhancing existing community knowledge, plus increasing the Centre's reputation as a hub for social justice, is achievable.

Recommendation Summary

Explaining Social Media:

Recommendation: The board should determine which social media platforms to use for its social media campaigns.

Recommendation: The board pursues creating an audience demographic profile and various personas to develop a target audience for social media campaigns.

Recommendation: The board set as one of its goals to build a self-sustaining online community to support the Centre and its activities.

Recommendation: The board develops an organizational persona.

Issues and Challenges:

Recommendation: The board should create a Roles and Responsibilities Guide, a Crisis Management Plan, and a Measurement & Reporting Plan.

Recommendation: The board reviews and identifies current activities, challenges, and opportunities and ranks them in order of significance or priority for further reference as the social media strategy takes shape.

Strategic Goals:

Recommendation: The board adopted a one-year outreach campaign to increase awareness of its services and other activities with associated calls to action to increase traffic with a target of a possible 5% to 15% increase in specific metrics with key performance indicators to be determined.

Recommendation: The board or a social media coordinator creates a calendar using several key programs for a targeted campaign over one year, assigning the necessary resources. Specific metrics would be used to measure the performance of each campaign.

Recommendation: Explore various tactics to bring real-world audiences into the online world

Recommendation: The board initiates one or more education campaigns on social media.

Recommendation: The board and staff collaborate to choose one or two public education campaigns using high-interest topics relevant to a targeted audience. The campaign should tie in both social media and website activity to support a call to action, along with a possible transaction involving some activity on the website. Metrics should be determined and used to measure the campaign.

Recommendation: A "how-to" campaign to educate the public on an issue involving a video posted to a social media platform, providing a step-by-step guide on a relevant topic. Metrics should be used to measure the campaign.

Recommendation: Design an ongoing social media monitoring system searching keywords and terms to identify opportunities to offer expertise and information to the public engaged in relevant, timely discussions. Record the interventions. Monitor metrics for social media and the website to

measure results. Analyze these to determine the most effective interventions, topics, and information. Build from established patterns to enhance reputation, trust, and credibility.

Recommendation: The board selects several topics to facilitate public discussions and/or participate in existing ones.

Recommendation: The board explores tactics to leverage social media to support fundraising beyond simple promotion, including possible e-commerce solutions.

Recommendation: To seek formal social media sharing agreements with sympathetic or aligned agencies, governments, or groups.

Recommendation: Create an advocacy rewards program.

Recommendation: The board should pick two or three events to develop related social media and website campaigns using a form or sign-up sheet as a pilot.

Governance:

Recommendation: The board decides the level of resources allocated to the implementation of its social media strategy.

Recommendation: The board creates a decision tree to formalize its approval process.

Recommendation: The board examines the purchase of a social media management tool such as Hootsuite, plus the appropriate training for anyone involved in the posting or approving posts.

Recommendations: The creation of a policy regarding posting on social media known as a Social Media Governance Plan with clearly stated decision trees, protocols and approvals.

Recommendation: The board should provide guidelines for voice and persona.

Recommendation: The board creates a Crisis Management Plan for social media.

Implementation:

Recommendation: A series of experiments or pilots are undertaken to test posts, monitor results, and establish workable protocols for posts on multiple platforms.

Recommendation: Posts should experiment with various types of content to measure any impacts.

Recommendation: The board develops an engagement funnel to align with its social media strategy across multiple platforms and the website.

Recommendation: The board reviews its website, making the necessary adjustments to better align with its social media strategy.

Maintenance:

Recommendation: The board implements a protocol where a monthly insights report is presented, tracking the metrics and analyzing performance.

Recommendation: The board develops a list of potential businesses and non-traditional organizations/agencies to explore forming mutually beneficial online and real-world partnerships to enhance outreach initiatives.

Recommend: The board develops an online community as part of its social media strategy using various engagement tactics and techniques.

Appendix

Social Media Crisis Management template
Social Media Policy template
Examples of Social Media posts
Author bios

Social Media Crisis Plan

[YOUR BRAND HERE]

How Do We Define a Social Media Crisis?

For [YOUR BRAND HERE], a social media crisis is any negative event or experience that could adversely affect our brand. They may range from low to moderate issues, such as elevated levels of customer complaints, to major concerns (such as inappropriate employee conduct or negative press coverage).

Social Media Crisis Levels

Unsure if a situation is routine or a crisis? Follow the examples in this guide to make an accurate assessment.

Level 1	Routine questions and complaints.
Level 2	Angry customer. Broken links. Incorrect URLs. Factual inaccuracies.
Level 3	10+ angry customers per hour. Service outage. Lack of product availability (etc.)
Level 4	Product recall. Defects. Negative news goes viral. Employee misconduct.
Level 5	Lawsuit. Serious accident or injury. Illegal employee conduct. Layoffs.

30 Minutes

This is the maximum amount of time we have to respond to a social media crisis.

Who Should Respond During a Social Media Crisis?

You may have questions around who should respond to social media users in the event of an issue or crisis.

Follow the table to the right to understand whether it's appropriate for you to respond (or who to alert should you spot an issue).

Level 1	Customer Support Agent
Level 2	Customer Support Manager
Level 3	CSM / PR Associate
Level 4	Senior PR Associate / Manager
Level 5	PR Manager / CEO

Where to Find Social Media Login Credentials

All social media login credentials can be found in [INSERT PASSWORD MANAGEMENT APP].

You can log into the password manager here:

[INSERT URL]

Step 1: Log into [INSERT NAME OF PASSWORD MANAGEMENT APP YOU USE].

Step 2: Search [SOCIAL NETWORK/SOCIAL PLATFORM].

Step 3: Make necessary changes carefully.

Social Media Crisis Contact Information

If you need to reach someone in the company to discuss a social media crisis, please find the appropriate contact to the right.

[NAME]
[TITLE]
[PHONE #]
[EMAIL ADDRESS]

[NAME]
[TITLE]
[PHONE #]
[EMAIL ADDRESS]

[NAME]
[TITLE]
[PHONE #]
[EMAIL ADDRESS]

Crisis Management Best Practices

When responding to a social media crisis, follow the best practices listed to the right.

1. Respond on the network where a complaint occurs.
2. Limit responses to two posts, maximum. Then, move the conversation to chat, email, or a phone call.
3. Avoid arguing.
4. Be apologetic.
5. Stay calm.

Social Media Crisis Management Checklist

In the event of a crisis, use this checklist to execute our social media crisis management plan effectively. Due diligence and care will ensure we emerge from the situation with minimal damage.

- [ ] Assess crisis level.
- [ ] Alert internal stakeholders and employees.
- [ ] Let staff know how to respond (if questioned).
- [ ] Pause all social media automation.
- [ ] Make a public statement on all channels.
- [ ] Create crisis FAQ page or blog post.
- [ ] If necessary, create apology video with CEO.
- [ ] Monitor all online discussions about the incident.
- [ ] Respond to all complaints.
- [ ] Analyze social metrics during crisis period.
- [ ] Evaluate how to prevent another occurrence.
- [ ] Host meeting to cover preventative measures.

REPLACE WITH YOUR LOGO

SOCIAL MEDIA POLICY

TABLE OF CONTENTS

1. STATEMENT AND SCOPE
2. TACTICAL GUIDELINES FOR EMPLOYEES
3. CONSEQUENCE OF BREACH
4. ANNUAL REVIEW

Last revision: [insert date]

STATEMENT AND SCOPE

As an employee and representative of [company name], you are expected to demonstrate best practices and appropriate etiquette on social media, including but not limited to the following:

- [insert guideline, e.g., Be respectful to all, No hate speech, No confidential company info, etc.]
- [guideline]
- [guideline]
- [guideline]
- [guideline]
- [as many guidelines as is necessary]

Customer Inquiries

[Describe process employees are expected to follow when a customer contacts them via social media.]

Questionable content

[Describe process employees are expected to follow when coming across misinformation, news leaks, confidential information, or other questionable content regarding the company on social media.]

TACTICAL GUIDELINES FOR EMPLOYEES

When do I need approval to post a message on social media?

[insert answer, including who to contact for approval]

What kind of information am I allowed to post related to my work on social media?
[insert answer and examples]

Should I include my company info in my social media bio? Or should I keep my company accounts and my personal accounts separate?
[insert answer and examples]

What should I do on social media during a PR crisis?
[insert answer and examples]

How do I comply with copyright law on social media?
[insert answer and examples]

CONSEQUENCE OF BREACH

[Clearly describe the discipline process for failure to comply with the social media policy]

ANNUAL REVIEW

This policy will be reviewed once per year. All employees will be provided with access to a copy.

Examples of social media posts

These are examples of posts. The first is a current posting for a golf event. The second is an example of an Facebook post for the same event. The final is an example of an Instagram post for a campaign.

SAVE THE DATE

SEPT. 14, 2021

THE NORTHUMBERLAND HELP AND LEGAL CENTRE

11th ANNUAL GOLF TOURNAMENT

SHELTER VALLEY PINES GOLF COURSE

CONTACT: Doug Lloyd
dougllloyd80@gmail.com

THE 11TH ANNUAL

NORTHUMBERLAND HELP & LEGAL CENTRE TOURNAMENT

SEPTEMBER 14, 2021

SHELTER VALLEY PINES GOLF COURSE

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CONTACT DOUG LLOYD
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Professor Robert Washburn, Loyalist College

Robert Washburn is an award-winning educator in the Journalism Program at Loyalist College, where he teaches new and emerging technologies used in journalism. He also teaches Digital Marketing in the Business Program Washburn also instructs a course called Technology and Humanity in the General Arts and Sciences Program. A practicing journalist for nearly 40 years.

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Emily Washburn

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