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THE SOCIAL MEDIA TOOL BOX: TEN TIPS FOR PLANNING WHAT TO USE AND WHY

(This piece is written especially for community foundations, but is applicable to everyone using social media.)

Now that we've seen the impact social media has had in creating success for the Obama campaign, more and more foundations, non-profits and mission-driven organizations are interested in using social media to promote, organize and even get donations from their audiences. But for those who are new to the game, the questions remain: When is using social media most effective? What tools to use? How to get started? What kind of resources—staff and otherwise—does using social media require?

This white paper is meant to provide a starting place for non-profit managers, foundation executives and others looking to take advantage of these tools, and is based on discussions with actually community foundation staff at the Knight Foundation Community Information Media Seminar held in Miami in February, 2009.

1. Have a strategy to execute against

Activity without purpose is neither impactful nor effective. Make sure you have a set of clearly defined goals to achieve that you will use social media to reach. Define and plan a strategy designed to help you achieve specific goals.

Examples of appropriate goals are:

- Create a campaign to expand a Young Professionals network for a community foundation, building membership, participation and engagement
- Use social media to extend and highlight a series of town hall meeting with local organizers, furthering discussion among a diverse set of audiences, online and offline
- Conduct a marketing and outreach campaign for a specific program, such as local arts competition or grant-making process, reaching a broader audience through social media

In contrast, here are some inappropriate goals:

- Use social media to hold a discussion online without ever inviting people in person or having any fact to face meetings to create trust and set a framework



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- Launch a social media program to promote your organization, just because
- Use social media instead of email to communicate with your older, already engaged members or donors because it's cooler or cheaper

2. Start by focusing on promoting and building engagement around a specific program, event or initiative—a first effort that happens within a 1-3 month time frame is ideal.

It's a sprint, not a marathon. Think of this as “bursty” work, an effort that can flare up, then subside. While your organization ideally already has a blog you're updating 3-5X a week, you don't need to pay equal attention to all social media tools on a daily basis.

You will get the most out of social media, especially in the getting-started stage, if you select something to promote that has a time delimited framework—i.e. you're doing this at a more intense pace for a smaller period of time.

3. Make one person responsible, but train everyone in how to use the tools, and get at least 3 people involved.

You will want to delegate one person to be the owner of the goals, the metrics, the plan and the schedule, but don't let that person go it alone. Social media is most effective when there are multiple people using a light touch, not one person slogging along alone. This is both because you want to create an ecosystem of multiple voices and links and because you want your campaign not only to work with your audience, but help to educate your organization.

4. Use a coach, strategist or expert to help you develop your first strategy, plan the execution, and coach your team,

Spend time with an expert user who can help everyone feel comfortable using the tools, and who can be an ongoing resource for phone calls and check-ins; practice is the only way to get comfortable, but an expert resource makes a big difference in getting that first win. As you learn more, take on more in-house.

5. Only do what is measurable and focused

The web today is all about metrics. If you can't measure it, you shouldn't do it. Make sure every campaign you plan has clear goals and that you are prepared to track them. If you need support, this is an area where an expert can coach and train.

Types of goals to consider for your campaign (and how to measure them)



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- Increase page views to a URL and/or increase unique visitors (Measure with Google Analytics, Hitwise, Omniture)
- Increase user engagement (Measure time spent on site, number of registered users, number of participants or members of a new online community/group, number of posts or comments)
- Increase linking and awareness of your organization and/or program (Measure links surfaced in Google search and Google blog search)
- Sell a specific number of tickets (Acteva or other ticketing software/total revenue)
- Sell a specific set of items (Paypal transactions)
- Fundraising goal or micro-donations (TipJoy/PayPal/other systems/revenue)
- PR/Media coverage in specific properties
- User/community satisfaction-measure in online survey

You will most likely want to select more than one of these metrics and tools to track, but again, focus on a few for your first effort.

5. Use offline events to drive online promotions and social media tools to promote live events.

If you have a program that is driving, say a grants competition, schedule a series of live meet-ups to discuss the program and promote them online. Your more wired attendees will respond by blogging, posting to Twitter and Flickr, and so on, creating yet more awareness of your program.

Similarly, as you gain visibility for your social media efforts in your community, you will find that people blog and Twitter about their plans to participate before an event happens, helping to create that social media ecosystem you want to build.

6. Pick a set of tool for your first campaigns—and don't omit the basics

Social media is most effective when you get multiple people, in your organization and outside of it, blogging, posting and commenting about your programs and events. It is this virtuous circle, or online ecosystem, that lets to strong awareness, viral growth and successful program development.

There are at least 10 different tools that could be used, but there are 3 you should consider essential for just about any program:



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- Blog: Ideally your blog already exists, gets updated at least 3X a week, has an editor or manager, links out, and has at least 3 writers, perhaps more. Blogs have RSS feeds and alerts that can port to mobile. If your blog does not have an RSS feed, get one ASAP.
- Twitter: Establish a twitter account for your program or promotion; you can twitter under your own name as well, but you want an “official” twitter account that people can follow. Also remember you may want to create a #hashtag for your program, so people have a standard, searchable abbreviation when they twitter about you. Twitter easily ports to mobile.
- Flickr: The world’s largest photo-sharing community, Yahoo-owned Flickr is a place where you will want to have an account for your program AND where you will want to encourage people to post their own photos and videos of events related to your program. Of course, you can then blog and twitter about these images, just as your online community will do. Flickr has RSS feeds that can port to mobile and privacy controls to allow or restrict access to specific images or sets.

Additional tools to consider:

- Facebook: More than 44 million Americans are on Facebook, more than 100 million people overall. While the majority of Facebook users may be 18-35, the number of 35-60 year old people is growing rapidly. Facebook is essential not only because of its ubiquity, but because it has an highly integrated set of tools, notably Fan Pages (perfect for your foundation), Groups(just right for groups and programs) and Event pages and invites Facebook’s privacy controls give you varied options both on who can participate in a group or event, and how searchable they are.
- YouTube: Video sharing and uploading site YouTube allows you to create your own channel, which users can then subscribe to. Other community-focused video upload and display services to also consider are Viddler and Vimeo.
- Seesmic: This is a video Twitter; i.e. video micro-blogging (posts under 10 minutes). Although it is less popular than YouTube, it has an avid community following among 20 somethings and is a great video tool.
- 12seconds.tv: Another micro-blogging tool, 12 seconds literally gives you just that long to create a message and post it.



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- Upcoming.org: A free calendar listing with a social network component (see what your friends are doing) that is most popular in tech-heavy communities, but still worth using everywhere.
- Meetup.com: A group meetup and club service that allows you to create groups, communicate with them, and have visible event pages—much like Facebook, without FB's other tools.

7. Put the virtuous circle into effect.

Remember, the network effect kicks in with social media when you and your engaged users are creating content and links in more than one format. This means you have to maintain effort and stay on plan in multiple formats.

An example of how it works:

- A Knight Foundation staffer blogs about an upcoming meeting to discuss The Knight News Challenge.
- Knight twitters about the meeting and links to the blog.
- User 1 sees the twitter and retweets it, linking to the blog.
- User 2 twitters that they hope they can go as well, and links to the blog and references the earlier tweet.
- User 3 writes a blog post about this meet up and why going is important.
- User 4 creates an event listing on Upcoming.org; 17 people say they are interested in going and 8 say they are definitely going.
- User 1 sees this progression and twitters about it, then does a blog post about it.
- Knight invites more people to come to the meeting, saying we have room!
- The meeting happens. 3 people take photos. 2 people capture audio. 1 person shoots video. All 5 people post their content to their blogs and to flickr and twitter about it.
- 3 more people twitter they heard it was a good meeting and they regret missing it.
- User 3 twitters links to the data posted from the meeting.
- Knight Foundation blogs about another meeting in another city to discuss...And it keeps going...



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8. Create the right staffing and roles to execute your plan

A typical social media campaign, run over 3 months, might have the following roles:

1. Program owner and strategic manager (Could be editor, marketing, communications, development or other). This person is the owner of both the strategy and the execution.
2. Project Manager (Could be program owner or could be other person): Responsible for creating a schedule of what has to happen when in terms of posts, tweets, flickr tags, and sharing info on those back out to team and bloggers.
3. Social media marketing manager (could be marketing, marcom, communications, freelancer or other): Responsible for being evangelist and most prevalent voice in social media strategy, especially on twitter and in reaching out to bloggers and non-traditional press
4. Bloggers & social media content creators: Whomever you have blogging, shooting and posting pictures, etc.
5. Marketing and email campaign manager: this is the person who has previously done this in your office; they need to communicate closely with the social media marketing manager

Remember, none of these people is working full time on this; at Knight, we had .5 of the community manager's time, .5 of the Program Associate, .10 of the program owner's time, and .100 of the .30 time contractor we hired to be the program evangelist. For just 3 months.

9. Use social media in an ebb and flow, "bursty" way; you don't need to go full bore all the time.

In other words, you don't need to be twittering, posting, video-ing etc at the same white heat on an ongoing basis. While you don't want to make your audience go cold turkey on your messages (no tweets, no blogging) you can dial it way down once your campaign is past—and then ramp it up again for the next project. This is essential as a means to manage your human capital and completely reasonable in the social media community.

10. Experiment with micro-donation campaigns

Evangelists and non-profit staffers have conducted fund drives on Twitter, taking payments via Tip Joy, that have been effective in raising small but notable sums from new donor sources. If you're interested in raising between



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\$1,000 and \$20,000 through a micro-donor program, give it a try. There are a number of new case studies of Twestival, a Twitter-based fund drive for charity:water, that offers ideas and how tos. (See Susan Mernit's Tools for Transformation, white paper for the WeMedia conference, February 2009, for a detailed case study and exclusive interview on Twestival.)

CONCLUSION

With social media, as with many other things, there is no substitute for planning, setting goals, and taking action. At a certain point, the learning curve means you just jump in.

However, starting small, staying focused and using the tips listed here can move you forward enough to start forming your own opinion—and at the same time create success for your organization.

Appendix: Tools and resources to note

WordPress.com & WordPress.org: Blogging platforms

- Blogging platforms are the starting point for any social media strategy and two of the most popular are WordPress.com and WordPress.org. Both are easy to use and reliable. What's the difference between them?
- With WordPress.com, you create a blog that is hosted at WordPress and has a URL such as myblog.WordPress.com. You can use skins to create distinct look and layouts, and you can customize the blog, but it is hosted at their service.
- Using WordPress.org, you download the software, establish your blog, and pick a service to host it on.

WordPress.org, WordPress.com

Moveabletype.com, typepad.com: Blogging platforms

- Moveable type & Typepad.com are blogging platforms from Six Apart. Moveable Type, know as MT, is a downloadable application to create a blogging platform hosted at a third-party provider or on your own servers.
- Typepad is a \$129 per year hosted, turnkey service running on Six Apart servers.



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moveabletype.com, typepad.com

Twitter, micro-blogging platform:

- Twitter is a popular micro blogging platform that allows users to distribute their 140 character updates to their Twitter social network, aka followers, across multiple platforms (computer, PDA, phone).

twitter.com

Photo & Video resources

- Flickr: Flickr is the leading photo & video community and repository, with more than 1 billion photos stored. Owned by Yahoo!, Flickr offers pro accounts for easier uploading, but basic services are free.

flickr.com

- YouTube, YouTube is the largest video hosting site on the net. Users can both upload and view videos here. Videos can be viewed at YouTube or embedded elsewhere.

youtube.com

- Seesmic: Seesmic offers online video blogging, done through your computer's web cam. Videos can be viewed at Seesmic.com, or embedded elsewhere.

seesmic.com

- 12seconds: This site offers online video micro blogging, done through a web cam. Videos can be played here or embedded elsewhere.

12seconds.tv

- Vimeo is a video-centric social network site that allows you to post and display videos, much like YouTube, only smaller and with more community.

vimeo.com

- Viddler is another video hosting service, with plug-in tools that make it efficient to display video at WordPress and other blogging sites.

viddler.com

Social networks



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- Facebook: Facebook is one of the largest and most mainstream social network sites, With 90 million active users, the site is a daily visit for many people. The integrated tool set, which includes a groups function, an invite feature, fan pages that support messaging.

facebook.com

- LinkedIn: LinkedIn is the largest online professional social network. Focused on careers and professional networking, Linked In has a groups feature that is useful for social networking, event promotion, and messaging.

linkedin.com

- Ning: Ning offers a set of web-based tools that allow anyone to create a social network on a hosted platform. The templated, modular elements can be customized and modified by non-technical people; over 71,000 networks have been created to date.

ning.com

Utility applications

Upcoming: This Yahoo-owned service allows you to post & share events via online calendar; the social network aspects aids in event discovery.

upcoming.org

- Eventbrite: A popular service for selling tickets online and keeping the funds in a centralized place.

eventbrite.com

- Amiando: A popular service for selling tickets online and keeping the funds in a centralized place.

amandiano.com

- TipJoy: Service supporting making donations via PayPal through a Twitter interface.

About the author

ABOUT THE AUTHOR

Susan Mernit is a former Netscape & AOL VP who worked at Yahoo! as a Senior Director till she left in 2008. She is a long-time blogger, consultant, online news



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innovator, and social media maven who is passionate about using technology to connect people and to solve problems. Most recently, she ran the Knight News Challenge for The Knight Foundation; she is also an organizer of She's Geeky and The Public Media Collaborative, a member of the 2009 ONA conference committee and an Equality Camp organizer. Susan advises foundations, start-ups, non-profits and media companies on strategy, product development and using social media and is passionate about training people to set goals and use these tools.