

## Create a Social Media Policy in Ten Steps

Every organization with a social media presence (or who wants a social media presence) needs a social media policy! This handout briefly describes steps an organization can work through to develop a policy that governs your social media work.

- (1) Articulate your strategy (goals, audience) and plan for who and how to reach your networks. Some initial steps include:**

  - a. Determining your audience.
  - b. Deciding on or developing your organizational goals and objectives (your social media activities should be a clear and logical extension of your organization).
  - c. Doing your research. Think about which networks make sense for your organization to be a part of.
  
- (2) Identify goals for your social media engagement. For instance:**

  - a. Do you want to increase name recognition of your “brand”?
  - b. Do you want more people to sign up for your services?
  - c. Do you want to disseminate your information to more people?
  
- (3) Assign social media roles and responsibilities:**

  - a. Think about who is “in charge”? What support (whether staff, technology tools, etc.) does that person need to execute the kind of social media engagement your organization has the goal of achieving? Who can/should post where?
  - b. Develop a calendar and consider posting in the context of your organization’s other activities.
  
- (4) Determine what content you should post, and how that will happen:**

  - a. Go back to basics - what’s your goal and which activities will help you make progress towards that goal?
  - b. Set standards for the frequency of posts.
  - c. Assess the chain of approval you have in place, if any (and take into consideration whether these processes will interfere with the timeliness of some social media networks).
  - d. Determine the guidelines for what should your organization never post.



- (5) Include a plan for monitoring/evaluating your activities. Ask yourself:**
- Who is responsible for monitoring your social media presence?
  - What metrics will be gathered, and how often?
  - Is the time spent obtaining metrics worth the information you are able to gather?



- (6) Establish rules of thumb for who and how you respond to comments:**
- Decide who has authority to respond to or delete comments.
  - Balance the desire to quickly reply to someone and engage in a conversation to the need to reply thoughtfully.
- (7) Establish flexible policy for handling negative comments. For instance, create strategies and responses for:**
- Turning complaints into opportunities.
  - Avoiding the spread of misinformation.
  - Defining inappropriate behavior or postings, and responding or eliminating such posts
  - Deciding when it's best to simply ignore the comments!
- (8) Describe your expectations for comments, and rules on privacy and permissions:**
- Determine what is allowed and when it is allowed (for example, no profanity or flames).
  - Explicitly state that you are not responsible for third party posts.
- (9) Consider copyrights and how it pertains to your posting(s). This is particularly important for items like infographics, memes and other pictures, which are frequently reposted/retweeted and can efficiently convey a message. Consider:**
- The issue of copyright (where permission is needed) vs. creative commons (where permission is not needed).
  - The fact that everything online is not fair game for you to use!
- (10) Advise staff using social media on your behalf to draw the line between personal and professional posts. Think about:**
- Whether a comment or post will help or hurt your organization.
  - The fact that this should also apply to employees' personal pages which, though not directly work-related, could still reflect upon your organization.