

# Social Media Plan and Policy Worksheet

**Presented by**

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## Social Media Plan - Who, What, Where, When and How

**What is your purpose?** (Write your 'Social Media Mission Statement' - 2-3 sentences. What do you hope to accomplish with social media.)


**Who will you reach?** (What demographics are important to your message and purpose on social media, e.g. Gender, Age, Location, Profession, Family Status, Grantor, Policy Makers, funders/donors?)

Demographic/Status Type	Demographic/Status Audience

**Where is your audience?** (Based upon your mission and the audience demographics, which social media platforms, community, pages or hashtags does your audience use?)

Social Network	Links to / Hashtags used by group, community or page

**Which social networks?** (Which ones have you joined and which ones will you join.)

Social Network	Handle/Name	Link to Account

**What is your message?** (What primary/general topics will you talk about and where will you share and engage community members on these topics?)

Topics	Where will you share?

**What is your voice?** (Each social network, group, page, message may have a different voice depending upon your brand, the platform, your message, level of engagement sought and your audience. Examples: Conversational, Formal, Educational, Friendly, Informal)


**Who is on Team Social?** (Within your organization, your partners and other ambassadors, can be on your Team Social, what is their role and how can they assist in your social media success?)

Name	Role	Area of Assistance

**Who are your allies?** (Who is on social media that is sharing a similar message or shares an interest in your work or audience? Connect and collaborate in your messages.)

Organization/Ind. Name	Links and Social Media Handles	Shared Interest/Opportunity for collaborative support

**What are your social media content resources and sources?** (How will you keep informed and what resources provide relevant content for your message? What network(s) is best suited to the type of source.)

Source Name	Source Topic	Source Link	Share to Network

**When will you post?** (Develop a schedule of post for each of your networks for each day of the week at different times of the day. Evaluate your engagement to understand what and when you experience increases responses.)

Social Network	# of Posts Per Day	Days of the Week	Times

**When will you respond?** (Develop a schedule of who will review each network on which day and how often each day. Set expectations for response time by individual, day of the week and according to the nature of a specific social network.)

Social Network	Who	Review Date/Times	Response Time

**How will you respond?** (Work with your internal and external experts to develop responses to frequently asked questions or issues. Develop web pages, blog posts, informational videos, and other resources that can be used to quickly answer common issues and questions. Also, have a plan to respond to complaints, mistakes and crisis.)

Common Question/ Issue	Response	Link to resources

**How will you track your ‘who, what, where, when and how’?** (There are many ways to measure your return on investment and most social media networks have guides for measurements and most have built in analytics, tracking and measurement tools.)

Social Network	What will be measured	How will you measure

## Social Media Policy Template

**Social Media Mission Statement** ( See Social Media Plan - ‘What is your purpose?’)




## Social Media Specific Policy for Employees, Contractors or Volunteers

This policy is intended to provide employees, volunteers, supporters and contractors of the Organization with clarity on the use of social media platforms and networks. Please review and understand the organization's employees/contractor/volunteer conduct, communication and privacy requirements and guidelines as provided in the employee/contractor/volunteer agreements. In regards to social media, our goal is to enable employees/contractors/volunteers to participate in social media in a respectful, relevant way that builds our community connections, supports our mission, protects our reputation and clients, and follows the letter and intent of the law.

### 1. Scope

1.1. Social media is online media that allows for interaction and/or participation. For the purposes of this policy, social media is defined as 'any conversation or activity that occurs online, where people can share information or data that might impact the organization or the people who use our services.

1.1.1. Examples:

- 1.1.1.1. Social networking and micro-blogging sites like Facebook, Twitter, and Pintrest
- 1.1.1.2. Video and photo sharing sites like YouTube, Vimeo and Flickr
- 1.1.1.3. Online forums and discussion blogs, including comment on online news articles.

### 2. Social Media Usage

- 2.1. **Acceptable Use** - Internet access is used primarily for business purposes. Any social media use must not interfere with normal business activities, must not involve solicitations, must not be associated with or promote any for-profit business activity, and must not potentially damage the company's reputation or image.
- 2.2. **Blocked Content and Usage** - The Organization at its sole discretion, reserves the right to block access to any internet site or social media network.

### 3. Disclosure

If you talk you talk about work related matters that are within your job responsibility you must disclose that you are affiliated with the organization. Never represent the Organization or yourself in a false or misleading way. All statements must be true and not misleading; all claims must be substantiated.

4. **Protect**

Protect yourself and be careful about what personal information you share online.

5. **Engaging**

Social media comments must be meaningful and respectful. Unique, individual perspectives on non-confidential activities at the organization that adds value, connects to and promotes community, partners and colleagues are encouraged.

**Organization Employees, Contractors or Volunteers Must Not:**

1. Comment on any topic related to legal matters, litigation or any parties in litigation with the company.
2. Engage in social media when the topic may be considered a crisis situation. Please refer all social media activity around a crisis topic to the communications department. Remember, anonymous comments can be tracked back to your or the organization's IP address.
3. Create a company specific social media profile on your own. The organization's social media networks/profiles are created by the Social Media Strategist acting on behalf and at the request of the Communications and Executive Team.
4. Stalk, bully or marginalize any individual or group.

**Consequences:**

Employee and contractor engagement in social media activity will be monitored while at work and when representing and interacting with the organization. There should be no expectation of privacy while using social media during work hours.

In the event that the social media policy is violated:

1. The organization will report unlawful activity to the authorities.
2. Inappropriate activity is in conflict with this document and the employee / contractor agreement which may result in termination for just cause.

**Please confirm that you have read and understand the guidelines.**

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**Employee/Contractor Name-Print**

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**Employee/Contractor Signature**

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**Date**