



# Growing communities

How charity leaders govern social media globally to thrive online

# Introduction

Many charities consider social media to be an important channel to deliver on their communications and fundraising goals. Some use social media to deliver services. However, few incorporate social media as a core strategy to capitalise on its interactive opportunity to engage with new communities – at least not yet.

While some charities have made great progress, there is currently a social media knowledge gap at senior levels in charities worldwide – the very people expected to govern the opportunities and risks to achieve their charity's goals.

To fill the gap **Growing communities: How charity leaders govern social media globally to thrive online** captures the views and experiences of charity chief executives and their peers from Australia, Botswana, Canada, Ireland, India, New Zealand, the UK and the US. Grant Thornton Not for Profit and social

media specialists asked senior executives a range of questions covering five key areas: strategy, governance, education, risk and measurement.

Charity chief executives' perspectives are combined with insights from our global Not for Profit team, to provide charity leaders with guidance on how to embrace social media and create an environment that enables their charities to thrive online. This report also equips charity leaders with key questions to ask their operational teams, to ensure resources invested in social media deliver value.

**“Social media is a game changer. Charities looking to engage with a more technology literate audience need to harness the power of this rapidly evolving environment. Without an informed social media strategy – and the internal governance and operations to support it – funding may erode.”**

**Carol Rudge** | Global leader of Not for Profit | Grant Thornton

 @CarolRudge  linkd.in/1inDAzG

Tweet this

# Key findings

- Strategy:** The charity's strategy should drive social media use. The board must help formulate this strategy from a position of knowledge.
- Governance:** Charities should document their social media governance approach and share guidelines with everyone involved in their work. Clear guidance and understanding improves self-moderation.
- Education and training:** Formal education programmes should be used at every level of the organisation, including volunteers when it is relevant. Internal social networks, such as Yammer and Jive, can also provide opportunities for people to gain confidence and working knowledge of social media.
- Risk:** For many charities, non-engagement is a risk in itself, although each organisation has to weigh up the cost of social media against its benefits.
- Impact:** It is vital to measure impact, engagement and outcomes to justify investment in social media. Metrics should always be linked to a strategic goal and monitored to find the real value over time to beneficiaries.



## Read more


<b>Strategy</b>	05
<b>Governance</b>	10
<b>Education and training</b>	15
<b>Risk</b>	20
<b>Measuring</b>	24
<b>Calls to action</b>	28
<b>Contacts</b>	31



## questions every board should ask

A 2013 Grant Thornton survey of Not for Profits in Australia and New Zealand, *Doing good and doing it well*  found that 98% expect their social media activity to increase\*. If your organisation expects greater activity, it is time to address these questions with management.

- 1 **What part does social media play** in our strategic plan, who reports to the board about social media strategy and outcomes, and what is their level of experience?
- 2 **Do we have guidelines** to issue to staff and volunteers using social media and how do we encourage usage while mitigating risk?
- 3 **How can social networks help** to aid internal communications and break down silos across a charity?
- 4 **What resources have we allocated** to social media projects and how do we measure our return on investment?
- 5 **How can we monitor online discussions** that our charity should be involved in?
- 6 **Can any of our services be delivered** through social media to reach new beneficiaries?

 \*Source: Grant Thornton survey *Doing good and doing it well*

## Sharing the report

Social media is all about sharing and collaboration. We have drawn out our key findings and best practice examples to share with you. Please add your perspective to the debate by using the Twitter hashtag **#NfPSocialMedia**



In developing this report, we have sought knowledge from key contacts at charities who have developed strong social media strategies. Their input is highlighted with the light bulb icon throughout the report.

# Build in benefits from the start

**Social media must align with the overall strategy of the organisation.**

Grant Thornton has found charities are using social media to open up new funding sources, deliver innovative services and create transparency. Communication is important to charity strategy, but social media can help more broadly. There is a difference between social media being used by the majority as a low-cost marketing and communications tool, and social media being used to achieve strategic goals. It is cheap to activate, but needs investment over time to do well.



# Extending reach

As well as supplementing traditional messaging channels, social media can:

- 1 **Open up** new funding streams as traditional donations shrink.
- 2 **Target** beneficiaries that traditional media struggles to reach, especially the younger generation who expect information to be delivered online.
- 3 **Boost** collaborative approaches to service delivery.
- 4 **Act** as a transparent, accountable, accessible face of the charity.

In terms of funding streams, charities are increasingly being forced by the younger demographic into event-based giving, says Deryck Williams, national leader of charities and Not for Profit, Grant Thornton Canada. “It reaches Gen X and Millennials, but the net return from these groups can be lower than from other annual givers. The benefit is that social media gives you immediate feedback and the chance to build a lasting relationship.” It is also an easy way of enabling and encouraging long-term business networking without being intrusive.

## Of strategic importance

The conversational aspect of social media is ideal for charities where communication is the primary objective. Two-way communication and sharing among a virtual community delivers a vital strategic goal. Scope have been proactive. They have trained a team of ‘Story Champions’ who capture the real stories of people they assist and share them with the online community. Building this two-way conversation into strategy is important. As charities experiment and research best practice for social media, they will find many opportunities to turn their activity into interactive and conversational tools of engagement. Social media amplifies the effect as champions for the charity broadcast to their wider networks, deepening current relationships and starting new ones.

“With limited means of finance and infrastructure at their disposal, many not for profit organisations, especially in Africa, must constantly reach out and broadcast their goals and needs. By adopting social media these organisations can extend their reach, especially among the younger generation who are becoming more socially conscious.”

Madhavan Venkatachary | Partner |  
Grant Thornton Botswana

 [linkd.in/1mdBHL8](https://www.linkedin.com/company/linkd.in/1mdBHL8)


Tweet this

# Changing internal cultures

High-performing charities focus on their internal culture to achieve strategic change. Social media can be used internally as a tool that improves the organisation as well as helping beneficiaries by improving workflow, efficiency and sharing.

This can be seen clearly at charities again such as Scope in the UK, where social media has been embraced internally: 150 digital champions have been trained across all departments, who project the personality of the charity to their digital channels. “If you’re going to have a real culture change then it has to come from the organisation doing things differently,” says Richard Hawkes, chief executive officer of Scope. “It comes back to a culture of support from the leadership team. Without that buy-in from the start it’s difficult to achieve that cultural change.”

Other charities have focused on developing internal social media tools:



**“Social media breaks down the capacity for people to be siloed. Our closed Facebook group lets 900 staff share what they’re doing and board members can congratulate people directly. It flattens the organisation beautifully.”**

**Peter Burns** | Chief executive officer |  
YMCA Victoria, Australia

 @pbymca  linkd.in/1mH5UOI

Tweet this

Grant Thornton UK launched its own internal social network, Jam, in April 2014. The platform enriches collaboration and sharing across the firm, supporting both business-related and social groups as part of a wider social media strategy. As eyes are opened to the value of social media for business, so Jam provides a sandbox environment for people to try things like blogging and status updates in a safe environment. Leadership presence, blogs and taking the Jam experience to our annual partners’ conference blur the line between traditional communication and social channels, and open conversations to a wider audience than ever before.

# A social experiment

Who are you hoping to speak to and where are they to be found? These questions are important when formulating strategy: they are the 'social' aspect. Ask yourself if your audience is open to your style of messaging on that platform. Communicating on Facebook is like inviting someone into your living room – a personal, passionate affinity. If it's less emotional, then Twitter works better since users are open to talking outside their personal networks. LinkedIn is more like a business networking event and requires a more professional voice.

**74** out of the top **100** UK charities are on all three of the main social media platforms (Facebook, Twitter and LinkedIn)\*.



**“What’s the most suitable social media channel to achieve your messaging? The demographic defines what platform is best for each stakeholder group, and each platform can have a different message.”**

**Brent Kennerley** | National leader of Not for Profit | Grant Thornton New Zealand

 [linkd.in/119leqI](https://www.linkedin.com/in/linkd.in/119leqI)

Tweet this

Be aware that technology may outpace the rate of change in your organisation. Setting strategy early means you will have rules to apply to unexpected situations.



**“You can’t anticipate everything because social media is dynamic and evolving. Look for the principles to guide you rather than static and inflexible processes.”**

**Peter Derrick** | Executive director | The Leprosy Mission, Canada

 [@effecthope](https://twitter.com/effecthope)  [linkd.in/1wBHddJ](https://www.linkedin.com/in/linkd.in/1wBHddJ)

Tweet this



\*Source: Grant Thornton charity governance review 2014



# Buy-in power

Shaun Robinson, chief executive officer of the New Zealand Aids Foundation, highlights three areas as key: planning; setting a strategy; and gaining board understanding and approval. Such forward planning is uncommon. A March 2014 survey of charities in the US and Canada by software company Bloomerang found that of 9,000 small to medium-sized charities, 67% had no social media strategy, policies or goals documented. Policies give staff reassurance: just knowing they exist sets an agenda for the organisation.

Social media has to be linked to a broader risk management strategy from the start. The key risk factors, plans for reacting to breaches and notifying relevant team members have to be built into strategy.

Social media can boost transparency and accountability through publishing online, offering public access to senior staff and enhancing internal communications. Objectives such as driving donors to income streams, encouraging successful peer-to-peer fundraising and delivering services over the internet, can all be reached more easily if there is board-level engagement.



**“Our board set a plan back in 2009 to specifically move to social marketing in which social media is a key tool, and they are very engaged. We can easily see the benefit.”**

**Shaun Robinson** | Chief executive officer |  
New Zealand Aids Foundation

 [facebook.com/NZAFofficial](https://facebook.com/NZAFofficial)

[Tweet this](#)

## The best platforms for your objectives

### Where do our charities find their audiences?

- **Facebook** is still most popular, but posting too frequently can be counter-productive
- **Twitter** is the most conversational, as it allows for fast dissemination of news and reactions
- **YouTube** is a repository for video, which can then be embedded in communications or other social channels
- **Google+** is useful from a search engine optimisation (SEO) viewpoint, but is not yet exploited as a community-building tool
- Visual social media, such as **Instagram**, **Snapchat** and **Pinterest**, appears to be focused on even more specific groups such as young or female for instance. They are also ideal for creating content to share on other platforms

## Key finding

Social media has outpaced organisational change and has huge potential to deliver services, foster internal sharing and achieve strategic goals beyond communications.




# Learning to protect

**Many charities admit that there is a lack of understanding of social media at board level.**

Grant Thornton believes that understanding how to govern social media's use, leverage its opportunities and manage its risks, is vital. Improving knowledge at senior levels is also important to understanding impact and effectiveness. Just as with any other communication channel, the board cannot become involved in every operational matter. In setting a framework for governance, they have to understand what social media is and its capabilities.

# Who governs?

Social media is a 24-hour medium that gives the public free access to share opinions of your service, activities and brand: it can have positive and negative outcomes. A 2013 Grant Thornton study into social media use by business in the US, *Social media risks and rewards*  found that 56% of companies do not have an incident management plan and 27% have no plans to develop a social media policy\*. If these figures are reflected in the Not for Profit sector, there is cause for concern.

For most charities, the communications team regulates social media activity, with assistance from information and communications technology (ICT) services. Few have specific governance guidelines or protocols in place for social media and most rely on general conduct and best practice guidelines.

Communications and marketing departments are often given delegated authority over operational social media use, sometimes without an official framework to protect themselves and the charity. Appointing a board member with interest and experience in social media, who can react quickly and communicate needs to the board, can spread understanding without involving the board in every operational problem.

**“Many trustees are not digital natives and don’t always know what they should be asking. They may struggle to establish the risks, and what they should ask management about.”**


**Carol Rudge** | Global leader of Not for Profit | Grant Thornton

 @CarolRudge  linkd.in/1inDAzG

Tweet this

 \*Source: 'Social media risks and rewards' by Grant Thornton US

“I don’t think the board has to have experience in every area that brings a risk to the organisation,” says Mark Oster, managing partner Not for Profit at Grant Thornton US. “If management is doing an appropriate job, they don’t need to be skilled in social media. What the board needs, at the very least, is a basic understanding and access to advice on the subject.”

“It’s about making our leaders accessible and being transparent. Nowadays, people expect to be able to ask questions and to challenge. So it’s really important for us that people have that ability.”

Richard Hawkes | Chief executive officer |  
Scope, UK

 @R\_Hawkes  [linkd.in/1h0krMx](https://www.linkedin.com/in/1h0krMx)

[Tweet this](#)

“The recognition of social media as a strategic tool is yet to reach the agenda of charity boards. In India it remains largely an operational tool used for fundraising and attracting volunteers by a small population of large to mid-size charities. Chief executive officers and board members need to be made aware of the benefits and associated risks of social media.”

Rohit Bahadur | Partner | Grant Thornton India

 @GrantThorntonIN  [linkd.in/1inDYhx](https://www.linkedin.com/in/1inDYhx)

[Tweet this](#)

 \*Source: Grant Thornton charity governance review 2014

# How social media is different

Although social networking isn't a new concept, the technology enabling social media is different in terms of reach and accessibility. It is global, conversational and open. Governing its use is only possible through comprehending its differences to normal media.



**“When a group of people aren't that familiar with what the medium is, what it represents, the market they're talking to, and what they can and can't control, I think there is a risk around decision-making and risk management that can quickly get off balance. Any organisation that thinks it can manage the conversation that's happening about it in the community through social media is badly mistaken.”**

**Nigel Harris** | Chief executive officer |  
Mater Foundation, Australia

 @nigelsj\_harris  [linkd.in/1km2fV7](https://www.linkedin.com/company/mater-foundation)

[Tweet this](#)

## The 2,000-year old medium

For an interesting framing of how social media fits into human history, we recommend Tom Standage's book *Social Media: The First 2,000 years*. Standage eloquently argues that humans have always been social with their ideas – even Roman graffiti, wax tablets and revolutionary pamphlets count. Online and mobile technology is the way we prefer to communicate today and these are perfect platforms for social communication.

**Tom Standage** | Digital Editor | The Economist

 @tomstandage  [linkd.in/1oNc5oW](https://www.linkedin.com/company/the-economist)

[Tweet this](#)

# Building frameworks

Social media is an operational tool, but its enormous reach and immediacy requires appropriate governance that comes from board-level understanding. Governance in other areas is set from this level and social media should be treated in the same way. Approaching social media with preparation is essential to achieving a strong framework, giving better value for money and control over campaigns in real-time.

One question we are commonly asked is: 'Do I need two accounts, one for business and one for personal use?' In our view the number of accounts is not important. The key is to stay authentic, open and honest in your presence on social media, whilst being aware of any boundaries set by the organisation in advance.

A balance between security and personality has to be struck. Regular security checks, password changes and account reviews are all important, but charities must retain the personal touch both internally and externally. This reflects the culture of social media.

**“Charities need documented user policies. Things can become legally challenging if the personal and the organisational online presences are mixed. Compromised accounts can also sometimes be used maliciously: a particular vulnerability for charities where younger people with less experience of the need for information technology security are running social media.”**

**Deryck Williams** | National leader of charities and Not for Profit | Grant Thornton Canada

 @DeryckAWilliams  [linkd.in/1u4XB3g](https://www.linkedin.com/in/1u4XB3g)

[Tweet this](#)

## Key finding

Charities need a certain amount of freedom when using social media to benefit from its open and rapid qualities: guidelines should be simple and easy to remember if they are to be respected. Setting formalised governance over its use, not just communications, will make social media more effective at what it does best.



# Pointing it out

**Social media is both immediate and interactive. It forces change and this is what differentiates it from previous methods of communication. People must learn to operate in a new environment. Charities who learn about the power that it gives relationships and credibility will gain the rewards.**

Education and training are largely based on operational experience: a few key team members are focused on delivering the social media output. What they learn is valuable, but every level in the organisation can benefit from a systematic approach to social media training. From volunteers to senior management, educating at every tier of the structure will mean that social media is always being used to fulfil the goals of the charity. For example, reverse mentoring programmes, such as those used at the Charity Finance Group in the UK, pair senior and junior staff together so that social media knowledge can be passed between levels. Charities that embrace social media can create an engaged, dynamic and experimental culture.



“Every one of our board is on social media. Every one actively engages on Facebook, Yammer and LinkedIn, and many on Twitter. I’m actively involved in each.”

**Peter Burns** | Chief executive officer |  
YMCA Victoria, Australia

 @pbymca  linkd.in/1mH5U0I

Tweet this

## Speak first, policy later

Social media blurs the distinction between work and home. While general guidelines and training for staff cover most eventualities, social media can catch people with their guard down. The majority of our interviewees admitted that definitive policies to guide staff aren’t ready yet, and those that had such policies were still wary of the risks of self-moderation without training.

**Only 53%** of US non-profits post thought leadership content on social media<sup>1</sup>

 Tweet this

Only **1 in 10** Australian non-profits use Twitter hashtags<sup>2</sup>

 Tweet this

“As well as setting guidelines for social media use, it is important for charities to communicate these policies to both their professionals and volunteers, as inappropriate individual use can reflect badly on the organisation itself.”

**Mark Oster** | National leader of Not for Profit |  
Grant Thornton US

 @Mark\_Oster  linkd.in/VcbKkQ

Tweet this

 1: Source: Nonprofit Quarterly, 2014

 2: Source: Wirth Consulting, 2012





# Mind the training gap

One way that charities are protecting themselves from this training gap is by limiting use and access to social media. Many believe that by doing this they are guaranteed quality, a single brand voice and consistency with no further training. However, this is to the detriment of a social culture within the organisation. It can also create a vacuum of access, where supporters, volunteers, stakeholders – and management – deliver their own message on personal accounts, with no training. While this can be good for the charity in terms of creating a wider network aligned with the group, it has to be monitored to make sure it's on message. Controlling the message means training and educating more staff to use social media successfully.

It benefits a charity to treat each part of their structure differently when it comes to social media training. If your staff are happy and supported, you are reducing the risk of negative actions online and they are likely to broadcast positive messages on social media about you. Fundraisers and supporters require a simple set of operational guidelines, while management should be given a more complex strategic overview. Approach the training by asking what is expected from each stakeholder to further the charity's mission, and where they sit in the overall structure of the organisation.



**“We have social media guidelines that we use for staff and volunteers. In the guidelines that we have, even the heading says ‘Tweet, share and ping’. So we really encourage our staff and volunteers.”**

**Ronan Ryan** | Head of fundraising and communications | Irish Red Cross, Ireland

 @karunadaka  linkd.in/119IUMK

Tweet this

# Receiving support

Trustees should be fully aware of their training policies. These can even be shared on social media internally, using tools such as Storify or private Facebook groups. They should recognise where resource could be well spent to achieve less risk and more return. Hiring staff with solid experience and identifying board social media champions who can educate members helps. At times, external training can be superb at sharpening a charity's use of social media. Whether that is through a paid service, or delivered through the corporate social responsibility policy of a private company, there are resources available globally to help.

**“Sometimes feeding back to the board through a member who really understands the technology can be a great education that feeds into future strategy. So education can be about representation on the board as well as using outside help.”**

**Turlough Mullen**

Partner and head of Not for Profit group |  
Grant Thornton Ireland

 [linkd.in/1km2pvB](https://www.linkedin.com/company/grant-thornton-ireland)

[Tweet this](#)

**“As a Not for Profit we benefit from a lot of goodwill from technology companies. Twitter, Facebook and Google have all invited us to participate in free seminars to tell us how to best use the product. Twitter and Google have also given the Society a batch of free advertising as part of their Not for Profit programmes, which has been invaluable.”**

**David Drakeford** | Head of information and communication technology | Irish Cancer Society, Ireland

 [@IrishcancerSoc](https://twitter.com/IrishcancerSoc)  [linkd.in/1km2tvG](https://www.linkedin.com/company/irish-cancer-society)

[Tweet this](#)

## LEGO examines its directors

Senior management at the toy company LEGO are encouraged to sit social media exams, with theory and practical tests over one day leading to a special qualification. The course culminates with a status update post on LEGO's four million-strong Facebook page. **"You see the nervousness around the room when they see they need to communicate with customers,"** said LEGO's global director of social media Lars Silberbauer at a 2013 marketing conference. **"But when they get 500 likes, that's when they realise what social media's all about."** Could charities and Not for Profits emulate this smart idea?

### Key finding

Choosing and implementing the best training means that board members should understand what it is their organisation needs the most. They will only know for sure when they have been educated in social media themselves. Whether through corporate social responsibility outreach, nimble reverse-mentoring programmes or paid-for training days, they have to make time to get involved.

# Risks worth taking

The dangers of social media are clear, but the risk to a charity of not getting involved is far greater. Our interviews revealed that isolating risks and applying appropriate resources to each should be best practice for board and senior management. Regular meetings will ensure consistency across all channels and better engagement. While including social media in the charity's enterprise risk management from the beginning will help mitigate risks and identify opportunities.

Aside from guidelines, efficient monitoring is one of the key ways charities control risk from social media. Resourcing it can be problematic. If a charity's social media activity is the preserve of one or two people, it can reduce the charity's ability to tackle problems head on and can affect consistency if key people leave.



“They are your voice. We lost our last Twitter operator shortly after I joined, and suddenly our tailored personality and presence was altered.”

**Richard Parry** | Chief executive officer |  
Canal & River Trust, UK

 @CanalRiverTrust

Tweet this

**“One of our sister organisations engaged resources to respond and send information out in accordance with monitored conversations. People said they felt like there was a helpful expert walking alongside their conversation. For example, someone posted a comment wondering if obesity affects MS. The experts in the background curated and sent out a summary of obesity findings the next day.”**

**Lincoln Hopper** | Chief executive officer |  
MS Society Queensland, Australia

 @msqld  linkd.in/UtfWww

[Tweet this](#)


An active online community steps up to rebuff critics, but the primary information has to come from the charity and its experts. Using specialist tools that report on keywords and sentiment in social media gives charities the opportunity to step in if negative or false reports are circulating, and to feed into beneficial conversations at the right time. As with many tools, cost may impact accuracy, a challenge charities should be aware of.

Social media can also be a proactive tool to counter risks. RSPCA Queensland in Australia, for instance, used a Facebook posting to temporarily rehome 350 animals at risk from flooding in just a few hours. The Irish Cancer Society used social media to keep donors informed when their website systems crashed late one Friday night after a friend of the charity made an unplanned appeal on a late-night chat show. Charities risk missing these opportunities if they do not engage.

Giving staff training to identify risks and the means to report and counter them is a good start. Making sure senior levels understand the technological as well as reputational risks of social media is essential. Since the technology may be out of their control, the speed and effectiveness of their response is all the more important.

**“There are two main risks to be managed: technology and reputation. Charities have a fair understanding of reputational risk, but aren’t so good at profiling technological risk.”**

**Deryck Williams** | National leader of charities and Not for Profit | Grant Thornton Canada

 @DeryckAWilliams  linkd.in/1u4XB3g

[Tweet this](#)

# Look who's talking


Avoiding risk means asking who has access, when they should join the conversation and how they should speak. Some companies insist on mandatory social media training for all staff online to avoid reputational risk through unqualified commentary, careless remarks or simply contradictory, repetitive conversations. Guidelines can also be issued at a volunteer level to minimise exposure to risk, though this is only advised if your volunteers are experienced and can be relied on to manage your reputation online.



# Anything to report?

Reporting on social media should be part of the larger enterprise risk management reporting structure, but ad-hoc reporting to the board in extreme cases seems to be the general rule, with few charities having social media-specific lines of reporting. Many interviewees said that a formal approach to risk might not work. Social media is relaxed, fast and informal. If staff have robust guidelines and training, they can be left to self-moderate. As Caron Bradshaw, chief executive officer of Charity Finance Group UK points out, the biggest risk is wasting time.

Simplicity is the key to setting successful protocols. "Don't create obstacles that cause an overly cautious approach," says Paul Thomas, senior manager digital communications and social media, Grant Thornton UK. "We don't read policy unless we think we may have broken it, so keep guidelines simple, open and accessible, much like the medium itself."



**“Do you stand next to your staff at a networking event and police everything that they say? Our approach to risk is about trying to get staff to think about the consequences of their actions and mitigating the consequences of the actions of others.”**

**Caron Bradshaw** | Chief executive officer | Charity Finance Group, UK

 @caronlb  linkd.in/1ImZjw1

Tweet this

## Who knows the rules?

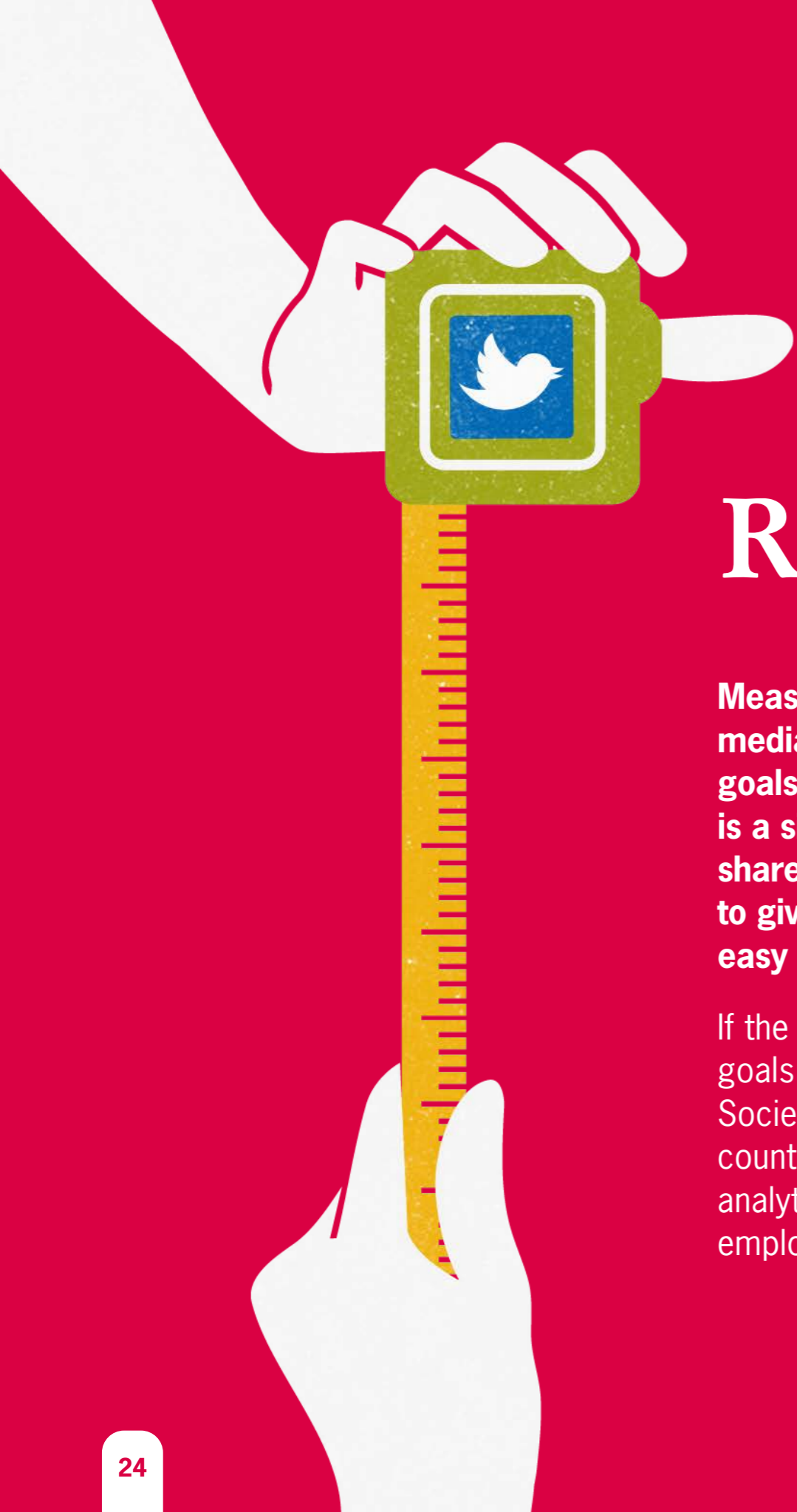
“Few Not for Profits have spoken to us about social media, which suggests there isn’t much focus on strategy,” says Jan Hertzberg, managing director business advisory services, Grant Thornton US. “The greatest risk is disclosure: safeguarding information is essential, and you need strategic limitation of what you can and can’t do. Training and awareness are critical in formulating this policy.”

## Selfies & identity crisis

The #nomakeupselfie viral campaign raised over £8m for Cancer Research UK in 2014, translating well to text-based phone communications thanks to its donor text code. There were a few cases where predictive text, or a wrong number, resulted in UNICEF or the WWF receiving donations in error. The two charities were quick to correct the problem, but the ease of virality slipping into risk exposure is clear.

## Key finding

Risks will always be present on social media but they are outweighed by the opportunities it offers. Engaging with social media at board and senior management level will help to avoid mistakes and minimise the risks that are ever-present. Understanding the risks strategically rather than expecting operational involvement from the board is the best way forward.



# Reaching for more tools

**Measurements give the board an indication of benefits: investment in social media should be based upon proof of how effective it is at achieving a charity's goals. Income is only one such indicator. For some charities, communication is a simple thing to measure on social media. Downloads, unique views and shares can all be viewed as indicators, which combine with anecdotal evidence to give a snapshot of effectiveness. Measurement techniques should enable easy comparison to other means of delivery.**

If the planning and targets are not in place and linked to strategic organisational goals, then there is not much point using the tools. In the words of the Irish Cancer Society, "If you have analytics but no events and goals, you just have a fancy hit counter. It's not about how many visitors, it's about what they do." Enthusiasm for analytic tools can also be tempered by cost: not every charity has the budget to employ them.





# When tools are not required

By tracking and analysing referrals, views and usage over time, the success of campaigns can be inferred from the data. The principle is to link back to strategy: have the right people been targeted, what proportion can be expected to respond and what is the long-term result? Investment in resources, training and creating social media guidelines will be easier if management have a firm and fixed notion of value. Analytics are the way to achieve that.

**“There is no point investing in social media unless it is successful in meeting the organisation’s strategic objectives. Knowing how you will define success will help you set your goals in the planning stage – what are you trying to achieve by using social media and how will you know when you’ve been successful? Measurement is crucial to understanding whether those goals have been achieved.”**

**Simon Hancox** | National leader of not for profit | Grant Thornton Australia

 @GrantThorntonAU  linkd.in/1qtipBp

Tweet this

**“It’s about delivering the results to the board and proving what you did. If we can show how social media impacts, with specific, positive data then you generate greater buy-in.”**

**Caron Bradshaw** | Chief executive officer | Charity Finance Group, UK

 @caronlb  linkd.in/1ImZjw1

Tweet this



**“We’re really excited by a tool called SumAll, which allows you to pull analytics from Google, Facebook, Twitter, your shop and your blog and collect them all into a timeline that you can make notes on. You can see spikes where blog posts have triggered interest and responses.”**

**Peter Derrick** | Chief executive director |  
The Leprosy Mission, Canada

 @effecthope  linkd.in/1I89EaJ

[Tweet this](#)

## The sharpest tools

Some charities are already ahead of the pack in terms of introducing third-party analytics tools to measure effectiveness. These tools allow them to understand movements online and how they affect their strategy, by simplifying the data and collating it to allow for easier comparison and reporting. Social media monitoring company Brandwatch, for instance, even offer preferential rates to not for profits.

Several of our interviewees have experienced the value of these tools. One charity, tracking the referrals from a YouTube advert they had filmed, found 30,000 views led to only one donation. Another analysed data to find that asking people to fundraise for them over Facebook had twice the return on investment as asking directly for donations on the same platform. These tools are evolving fast: new sentiment analysis programmes such as ForSight track feelings in language, giving an insight into emotional engagement and attitudes.



**“We’ve imported Facebook Insights and Google Analytics into Sprout Social, a social media tool that puts everything on one screen. We’re able to see all the Facebook Insights into engagement clicks and various reach data, without logging into Facebook at all. It gives quite accurate Twitter metrics as well.”**

**David Drakeford** | Head of information and communication technology | Irish Cancer Society, Ireland

 @IrishCancerSoc  linkd.in/1km2tvG

[Tweet this](#)

## Measurement tools

“Three effective tools are Sysomos (sysomos.com), Market Wired (marketwired.com) and Radian6 (salesforcemarketingcloud.com), but none of them will do you good unless you know what you are measuring towards,” says Lucino Sotelo, head of digital marketing at Grant Thornton US. “While social media has been a godsend for Not for Profits in the US, activity is rarely led from the grass roots. Recently, San Franciscans mobilised on social media to transform their city into Gotham city for a five-year-old boy who wanted to be Batman and had been in touch with Make-A-Wish  They generated a lot of funds, but none of it was accidental: there was a social media strategist. Charities may have more luck winning the lottery than relying on fate to let their campaign go viral. You have to build a strategy first, build in measurement from the start, and use it to further your goals.”

## USAID does it with feeling

USAID has completed a pilot study in Kenya using the ForSight programme to follow the sentiments expressed on social media. By observing and collating language cues, their programme was able to understand how people felt about an issue – in this case, loan finance. Using tools in this way allows Not for Profits and charities a way to use the data generated automatically by beneficiaries.

## Key finding

Many tools are available to help with the job of measurement. But measuring is only useful if it tracks a strategic goal. Before allocating budget the board should be happy they are helping to move the charity's objectives forward.



# Calls to action

## **Our insights to help you get the most from social media**

Our report reveals many parallels across the world in how social media is being applied. Social media is a global tool, open to all: best practice can also be adopted globally. No matter what your charity does or where it operates, there are key lessons you can learn to use social media better.

## 1 Strategy

- Look beyond communication strategy. Make social media part of the wider business strategy to engage with all your audiences and drive new donors to your website
- Consider attending workshops and training to gain a level of understanding that allows you and your board to formulate an effective strategy
- Social media changes quickly, and charities have to stay current in their approach either through hiring skilled employees, training internally or using third party resources

## 2 Governance

- Guidance is needed at every level of the organisation, from board to operational staff and volunteers where appropriate.
- Keeping guidance simple will make it more likely to be followed. See examples at: <http://socialmediagovernance.com/policies/#tabs-61-tab-6>
- Monitoring conversations on social media is how your charity can gain insights into how it is perceived and may lead to new opportunities

## 3 Education and training

- Education and training programmes should include setting guidelines for those taking part, as well as protocols for individual and corporate use. They should be tailored to the appropriate levels to ensure each group understands their role
- Consider using internal social networks to boost understanding and confidence in social media tools and improve collaboration in charities that are spread over many locations or branches
- Formalise the training given to the networks of volunteers and supporters around the charity's use of social media and best practice

## 4 Managing risk

- For many charities, non-engagement is a risk in itself, although each charity has to weigh up the costs against social media's benefits
- Drawing up clear and consistent guidelines for use is necessary. Monitoring every interaction is not possible or desirable, so self-moderation and judgement is key

## 5 Measuring impact

- The metrics your charity uses should always link to a strategic goal. Understanding the impact of social media over time, and its varying platforms and specialities, allows your charity to refine strategy as you operate
- Knowing the numbers is important, especially when making decisions about resources and budgets
- Measure engagement, not just followers. Stories and conversations are the lifeblood of social media, so pursue them alongside the hard figures

# Further reading to stay ahead

Grant Thornton would like to thank the following charities who were interviewed for this report, some of which are quoted. You can keep up to date with their work via Twitter with the handles below.


## Thank you to the following charities


Charity	Twitter handle	Charity	Twitter handle
Alzheimer's Association	@alzassociation	Multiple Sclerosis Queensland	@msqld
Arthritis New Zealand	@ArthritisNZ	New Zealand Aids Foundation	@NZAFofficial
Barnardos New Zealand	@BarnardosNZ	RSPCA Queensland	@RSPCA_official
Canal & River Trust	@CanalRiverTrust	Scope	@scope
Charity Finance Group (CFG)	@CFGtweets	The Mater Foundation	@MaterNews
Irish Cancer Society	@IrishCancerSoc	Unicef	@unicef
Irish Red Cross	@IrishRedCross	Year Up	@yearup
effect:hope	@effecthope	YMCA Victoria	@ymcavictoria
The Leprosy Mission Canada		YMCA Edmonton	@YMCANorthernAB

## Further reading


There is a wealth of not for profit social media reports and blogs online. Here are our top 6 suggestions for further reading:

 **Aegis Media and Social Misfits Media's guide: 'Something to tweet about'** explores how to make the most of content in the social media world.

 **Tom Standage: Social Media: The First 2000 years** gives practical advice and examples of how to make social media work in your organisation.

 **Euan Semple: Organizations Don't Tweet, People Do: A Manager's Guide to the Social Web** provides a manager's guide to the social web.

 **Zoe Amar & Matt Collins: How to – social media for charity leaders** demystifies social media and offers straightforward strategies for charity leaders.

 **Jennifer Begg: live free range blog** provides insight from this consultant who works with organisations to deliver comprehensive social media training.

 **Top 150 non-profit blogs in the world**

# Global contacts

## GLOBAL LEADER

Carol Rudge United Kingdom +44 (0) 20 7728 2400 [carol.rudge@uk.gt.com](mailto:carol.rudge@uk.gt.com)

## ASIA PACIFIC

Simon Hancox Australia +61 (7) 3222 0200 [simon.hancox@au.gt.com](mailto:simon.hancox@au.gt.com)

Rohit Bahadur India +91 11 4278 7010 [rohit.bahadur@in.gt.com](mailto:rohit.bahadur@in.gt.com)

Vinh Ha Nguyen Vietnam +84 9 0412 8675 [vinhha.nguyen@vn.gt.com](mailto:vinhha.nguyen@vn.gt.com)

Brent Kennerley New Zealand +64 (0) 4 495 3771 [brent.kennerley@nz.gt.com](mailto:brent.kennerley@nz.gt.com)

## AFRICA

Madhavan Venkatachary Botswana +267 395 2313 [madhavan.venkatachary@bw.gt.com](mailto:madhavan.venkatachary@bw.gt.com)

Moustapha Coulibaly Ivory Coast +22 522 426650 [moustapha.coulibaly@ci.gt.com](mailto:moustapha.coulibaly@ci.gt.com)

Mansour Gaye Senegal +221 33 889 70 70 [mansour.gaye@sn.gt.com](mailto:mansour.gaye@sn.gt.com)

Barry Lodewyk South Africa +27 2141 78800 [barry.lodewyk@za.gt.com](mailto:barry.lodewyk@za.gt.com)

Constant Awesso Togo +228 22 25 87 74 [constant.awesso@tg.gt.com](mailto:constant.awesso@tg.gt.com)

Rodia Musonda Zambia +26 0211 227 722 [rmusonda@gt.com.zm](mailto:rmusonda@gt.com.zm)

Alice Mafanuke Zimbabwe +263 4 442511 [alice.mafanuke@zw.gt.com](mailto:alice.mafanuke@zw.gt.com)

## AMERICAS

Deryck Williams Canada +1 416 360 4954 [deryck.williams@ca.gt.com](mailto:deryck.williams@ca.gt.com)

Christine Regimbal Canada (Quebec) +1 514 878 2691 [regimbal.christine@rcgt.com](mailto:regimbal.christine@rcgt.com)

Mark Oster United States +1 212 542 9770 [mark.oster@us.gt.com](mailto:mark.oster@us.gt.com)

## EUROPE

Turlough Mullen Ireland +353 (0) 1 6805608 [turlough.mullen@ie.gt.com](mailto:turlough.mullen@ie.gt.com)

Roberta Papa Italy +39 027 600 8751 [roberta.papa@bernoni.it.gt.com](mailto:roberta.papa@bernoni.it.gt.com)

Pernilla Varverud Sweden +46 8 5630 7125 [pernilla.varverud@se.gt.com](mailto:pernilla.varverud@se.gt.com)

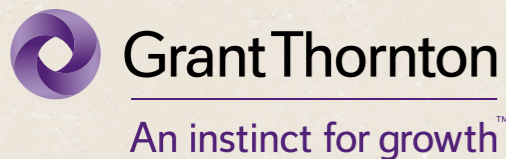
Carol Rudge United Kingdom +44 (0) 20 7728 2400 [carol.rudge@uk.gt.com](mailto:carol.rudge@uk.gt.com)

Grant Thornton is able to advise you in key areas addressed in this report. We understand the importance of social media to wider governance issues and can provide you with an international perspective to best practice. Social media is here to stay, but it is evolving fast. There is no right way for everyone – just the right way for your charity. Finding that way is where we can help.



# About us

Grant Thornton is one of the world's leading organisations of independent assurance, tax and advisory firms. These firms help dynamic organisations unlock their potential for growth by providing meaningful, forward looking advice. Proactive teams, led by approachable partners in these firms, use insights, experience and instinct to understand complex issues for privately owned, publicly listed and public sector clients and help them to find solutions. More than 38,500 Grant Thornton people, in over 130 countries, are focused on making a difference to clients, colleagues and the communities in which we live and work.



© 2014 Grant Thornton International Ltd. All rights reserved

“Grant Thornton” refers to the brand under which the Grant Thornton member firms provide assurance, tax and advisory services to their clients and/or refers to one or more member firms, as the context requires. Grant Thornton International Ltd (GTIL) and the member firms are not a worldwide partnership. GTIL and each member firm is a separate legal entity. Services are delivered by the member firms. GTIL does not provide services to clients. GTIL and its member firms are not agents of, and do not obligate, one another and are not liable for one another's acts or omissions. [www.gti.org](http://www.gti.org)