

A decorative border on the left and bottom of the page consists of numerous red icons. These icons represent various digital and social media concepts, including social media platforms (Twitter, Facebook, YouTube), communication (speech bubbles, email, SMS), technology (laptops, smartphones, Wi-Fi, USB), and general digital themes (gears, stars, binary code '1010', and various symbols like a magnifying glass, a wrench, and a flag).

# HIV PREVENTION GOES SOCIAL PART II

SOCIAL MEDIA STRATEGY, POLICY, & MONITORING WORKBOOK

## About NMAC

The National Minority AIDS Council (NMAC) was founded in 1987 by a small group of minority leaders alarmed by the fast-growing incidence of AIDS in communities of color. Today, NMAC is an experienced coalition of more than 4,000 community based organizations, health departments, and community planning groups across the U.S. and its territories. NMAC's formal mission is to “to develop leadership in communities of color to END the HIV/AIDS epidemic.” To achieve this goal, NMAC provides education, training, technical assistance, and other capacity building services to thousands of our constituents. We also advocate for federal policies to improve access to HIV prevention, treatment, and care, and host the nation's largest annual community-based AIDS meeting, the United States Conference on AIDS (USCA).

Learn more at [www.nmac.org](http://www.nmac.org)

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# Introduction

In 2011 we released the toolkit *HIV Prevention Goes Social: Using Social Media to Create, Connect, and Come Together*.<sup>1</sup> It contained basic information on how the HIV community is using social media for prevention and service delivery. We provided explanations of different social media tools and case studies to ground the information in real world settings. We heard from many of you that the toolkit was helpful, but you wanted more. More details. More examples. More tailored activities to customize the information to best meet the needs of your audiences.

This workbook is our response to your feedback. We hope you find it just as useful and that it makes you more curious and excited to take advantage of the ever-expanding world of social media within your own organization.

We developed this workbook to help you dig deeper into three key areas: social media strategy, use policies and guidelines, and monitoring and evaluation. Each section starts with an introduction and is accompanied by activities designed to help you take the concepts and apply them to your audience, mission, goals, and work in providing high-quality HIV prevention and services.

Social media will, without a doubt, change over time. How and where people use these tools will also evolve. However, the core concepts of engagement, listening, and taking a strategic approach will likely remain the same. By focusing on these core concepts and combining them with healthy doses of curiosity, creativity, and humility, you can go far!

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<sup>1</sup>Download the original toolkit here: <http://bit.ly/nmacsmtoolkit>. Accessed August 9, 2012.

# Strategy: Plan to Succeed

Strategy, simply put, is having a plan. Similar to building a physical structure, you first need a vision of what you want to build: Staff offices? A private space to discuss HIV test results? A conference room? Once you have a vision, then consider the necessary tools and resources to achieve it. At the same time, knowing what resources are available can also help to shape the final product, and these resources need to be considered during the initial planning phase. In either case, it is critical that your desired end product aligns with what is available.

Of course, being realistic doesn't mean that you shouldn't dream big. The difference between big dreams and big change, however, is having a plan.

## Start by listening

Reflecting on your audience, goals, and message can help to set the stage for future success. One of the most significant steps you can take to advance this goal is to listen. Sending out a survey, holding focus groups, or adding a question to an intake form are all some ways to learn about your audience.

Listen for the following types of information:

- What kind of information is your audience seeking? Are they finding it?
- What communications tools are they already using? If you don't know, how could you find out?
- What are they saying online? Who are they already talking to?
- What are they saying offline? Who are they already talking to?

## People first

Forrester Research's POST (People, Objectives, Strategy, Technology) method<sup>1</sup> is one framework that can be useful for working through a social media campaign or idea. This method is worth considering because a) it provides a step-by-step approach to turn goals into strategy, and b) it underscores the importance of putting people before technology. You may be familiar with the POST method from our social media toolkit – if so, this will be a refresher for you.

Let's take a moment to reflect on the four elements of POST. First, POST asks you to consider your **people**: not only who your audience is, but also how they communicate. As we noted before, this comes by listening. If they are online, which specific channels are they using? Do they communicate and interact largely offline? If you serve a broad range of people (for example, both teenagers and elders), consider how they provide and receive information.

The next step is to set some **objectives**. If your organization's mission is grand (to end the HIV epidemic, for example) pick one objective to start. Then think through how you will measure it. Let's say you are looking to increase HIV testing among young Black gay men. How many HIV tests are performed in a specific time frame now, and what percentage increase are you hoping to achieve?

The third step is **strategy**. What will you do, and how will these efforts support your objectives? What will change when you are successful? Continuing the example above, assume that your efforts are successful and that you double the number of men coming in to get tested. How does this impact your work?

The last step is **technology**. Given all the work you did to get to this point, you should have a clearer sense of where your audience is in order to more confidently select which tools and services to use.

<sup>1</sup> Bernoff J. *The POST Method: a systematic approach to social strategy, and The Nonprofit Social Media Decision Guide*, Idealware, 2010.

“Keep the needs of the clients in mind – do the limits of a tool limit what we want to get out of it?”

ERNESTO DOMINGUEZ  
CASCADE AIDS PROJECT



Healthy Black Communities (HBC), an organization formed to address health disparities in Black communities,

helps to organize National Black HIV/AIDS Awareness Day (NBHAAD) every year on February 7. LaMont “Montee” Evans, the NBHAAD National Chairperson, and his team of organizers use POST to frame their plans for NBHAAD. As described by Mr. Evans, POST is applied in the following way:<sup>1,2</sup>

- **People:** Blacks in the U.S. and the Diaspora.
- **Objectives:** Educate Blacks about HIV/AIDS basics in their local communities. This includes HIV testing, treatment, and building local leadership.
- **Strategy:** Provide planning resources for local activities to build a year-round dialogue.
- **Technology:** Tools that facilitate online technical support such as Facebook groups, AOL Instant Messenger (AIM), Google Chat. They also use Twitter and Flickr to share activities and put a face to the effort beyond NBHAAD.<sup>3</sup>

<sup>1</sup> See <http://blackaidsday.org>

<sup>2</sup> See <http://bit.ly/LEgvXR>

<sup>3</sup> Follow NBHAAD on Twitter [twitter.com/blackaidsday](https://twitter.com/blackaidsday) and Flickr [www.flickr.com/photos/blackaidsday](https://www.flickr.com/photos/blackaidsday)

## Use all the tools in your toolbox

As you consider your social media strategy, think about how social media supports the goals and objectives of your overall communication strategy and online activities, such as your website. A multi-channel approach (e.g. social media, website, newspapers, radio, posters, in-person outreach, etc.) will help you reach more people where, when, and how they want information. But social media differs from other channels and tactics in that it allows for a two-way conversation instead of simply pushing out a message. When deciding your strategic media mix, always consider your audience. If your audience is more reachable through offline methods, or through a mix of online and offline activities, then that is the approach you should consider.

### Bringing it home:

- People first. Technology comes last when creating a social media strategy.
- POST (People, Objectives, Strategy, Technology) can help you to plot out a vision or activity.
- Consider your communications strategy – how does social media support your other communication activities overall? Social media is only one tool in your communications toolkit. Plan to use it as a part of your larger communications efforts, which likely include offline and in-person activities as well.
- Not everyone uses social media – keep this in mind as well when planning.



Now it's your turn to apply this strategic approach to your own efforts. The following worksheets give you the opportunity to consider your own work and goals. These worksheets can help you to revisit (or augment) a social media activity that you've already started or plan out something new. You can complete them on your own, or grab a coworker or three and work it out together. Once you've completed the worksheets, or perhaps just taken them as far as you can without additional information, use them as a springboard for conversation and planning. Hang them in a place you can see them and periodically review to see if you are following the plan. And, if not, ask why. If you aren't ready to plot out a specific social media activity, there is still value in walking through a high-level strategic vision to see where social media may – or may not – fit with your work.



## WORKSHEET 1 | Listening Activity

Developing a social media listening strategy is just as important as your social media communications strategy. If you're new to social media, listening to the conversation first – before you start talking – will help familiarize you with how your peers and clients are using social media. What are they saying? What are they sharing? Once you begin to implement your social media activities, listening to the conversation will help you to monitor these activities and respond to the conversation. This listening activity will help you to learn more about the people you want to connect with.

### STEP 1: DETERMINE WHO YOU WILL LISTEN TO.

Who is your target audience?  
(e.g., *Black men at risk of HIV, peer organizations*)

What is the demographic of this audience?  
(e.g., *age, gender, geographic location*)

Which individuals or peer organizations would you like to follow online?  
(e.g., *an agency that also serves your target audience*)

### STEP 2: DETERMINE WHAT YOU WILL LISTEN FOR.

What key words are related to your organization, work, or mission?  
(e.g., *HIV, testing, USCA*)

What do you want to learn about your audience?  
(e.g., *what kind of information they are seeking*)

### STEP 3: START LISTENING!

1. For your first listening activity, try using Twitter, Facebook, or both. If you don't already have an account, create one now. You can also conduct this activity using other tools (e.g., Tumblr or Pinterest) to better understand how your target audience is using these tools.
2. Search for the organizations and people that you identified in Step 1 and begin to “follow” or “like” them.
3. Look at whom these people/groups follow or like, and begin to follow other users that seem similar to you or aligned with your interests.
4. Make an appointment with yourself to look at your Twitter or Facebook feed once a day for seven minutes.
5. Take notes of what you see and hear to learn more about your target audience and how others are communicating using social media. Use the questions below to help guide you.

What types of content or information are people sharing?

What types of information are people seeking?

What types of content are people retweeting or liking?\*

How are people saying in their comments?

What do you like about the way other people have written their tweets or posts?

What are things you would like to change about the way other people have written their tweets or posts?

\* See Appendix 2 for a glossary of common social media terms.

## WORKSHEET 2 | Target Audience Assessment

This activity builds on the previous Listening Activity to help you consider who you are trying to reach and how your target audience is – or is not – using social media. This information will help you choose the most appropriate social media tool to reach your audience later on. For the following exercise, make your best estimate if you don't know specifics. You will likely work with diverse audiences that have different media habits and information needs. An additional copy of this worksheet is available at the end of the workbook for you to copy and reuse. Use one sheet per audience.

1. Who are you trying to reach with your social media activities and/or overall communication activities? Can your target audience be divided into more specific segments, and if so, how? (e.g., Hispanic youth, African American youth, LGBTQ youth)

2. What portion of your target audience:	NONE	SOME	MOST	ALL	DON'T KNOW
Doesn't use social media at all (personally and/or professionally)					
Read social media without joining (e.g., reads blog posts and tweets, but do not reply or respond)					
Join social media platforms (e.g., Facebook, Twitter, Linked In)					
Create content and share it with social media (e.g., posts, pictures, videos)					
Share links or other content on social media					
Use social media to make health decisions					
Use social media to share health information					

3. What types of health information is your target audience seeking online? If you don't know, how could you find out? (e.g., listening, asking them)

ADAPTED FROM: AP42 Social Media Workbook, Masters of New Marketing. <http://ap42.com/socialmediaworkbook>. Accessed August 9, 2012



## WORKSHEET 3 | Tool Assessment

Now that you've started to explore how your target audience is (or is not) using social media tools, the next step is to consider your organizational capacity to use these tools. This worksheet will help you assess whether your target audience is using some common social media tools, if your organization is already using them, and if you have the capacity to use them in the future. Your social media strategy should utilize tools that provide the best opportunity to reach and engage with your target audience and respond to an expressed information need.

Tool	Target Audience Currently Uses	Staff Has Experience/ Necessary Skills	Organization Currently Uses	Could your organization use this tool?		
				Yes	No	Maybe
Facebook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Twitter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Blogs (e.g., Blogger, Tumblr, Wordpress)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Video Sharing (e.g., YouTube, Vimeo)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pinterest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Photo Sharing (e.g., Flickr, Picassa)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Podcasts (e.g., audio or video)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

ADAPTED FROM: Social Media Planning for Medical Reserve Corp Units, JSI, 2011.





## WORKSHEET 4 | Strategic Campaign Planning Framework

This worksheet will help you to plan and implement your first social media campaign. Think of your social media strategy as a series of campaigns, each with a specific goal. For example, you may have one campaign to encourage people to get tested for National HIV Testing Day and another campaign to recruit volunteers for a specific event. This activity uses the POST framework (detailed on page 3) to develop an approach to your campaign. An additional copy of this worksheet is available at the end of the workbook for you to copy and reuse.

### CAMPAIGN NAME (PROJECT/ACTIVITY):

**PEOPLE.** Who are you trying to reach? How are they using social media? If you don't know, how could you find out?  
*Refer to Worksheet 2: Target Audience Assessment.*

**OBJECTIVES.** What are you trying to accomplish?

**STRATEGY.** How will your efforts support your objectives? And assume you are successful. What will be different when you are done?

**TECHNOLOGY/TOOLS.** What tools best support your objective(s) and your audience's needs?

**MONITORING/EVALUATION.** How will you track and measure success?

ADAPTED FROM: Bernoff J. The POST Method: a systematic approach to social strategy, and The Nonprofit Social Media Decision Guide, Idealware, 2010.



## WORKSHEET 5 | Campaign Promotion and Maintenance Plan

Once you have completed the previous Campaign Planning activity, the next step is to develop a promotion and maintenance plan. This worksheet will help you to determine who on your staff will manage the tool, how often you will post, and what kinds of messages and information you will share.

CAMPAIGN NAME			
START DATE:		END DATE	
Social Media Tool	Who will manage?	Post Frequency (per day, per week)	Types of Information and Sample Messages to Post

ADAPTED FROM: Social Media Planning for Medical Reserve Corp Units, JSI, 2011.



# WORKSHEET 6 | Communication Integration and Frequency

How will your social media strategy integrate with your organization’s overall communication strategy? This worksheet helps you to think through your various communication activities across multiple channels – such as your website, email, social media, radio, posters, and in person outreach. Consider who you are trying to reach with each activity, who is responsible for implementing the activity, and how often.

				Frequency				
Activity	Communication Channel	Target Audience	Person Responsible	Daily	Weekly	Monthly	Quarterly	Annually

ADAPTED FROM: Social Media Planning for Medical Reserve Corp Units, JSI, 2011.



## CASE STUDY:

# STRATEGIC PLANNING

### RAUL POSAS, METRO TEENAIDS

Making an HIV prevention program work takes planning. Just ask Raul Posas, who runs Real Talk DC, a social marketing campaign managed by Metro TeenAIDS (MTA) in Washington, DC. Raul finds that staying fresh to keep young people engaged, while at the same time trying to grow the campaign, is a complex task. Raul and his team identified key elements that help them be strategic in their social media activities and keep their program running smoothly, including:

#### **Train all staff.**

Before peer educators (called Real Talk Reps) start, they go through a mandatory training. This includes basic HIV/STI 101 and professional development, including use of social media. Most peer educators know how to use the social media tools Real Talk DC is using, but they receive coaching on what is appropriate when speaking in the role of a Real Talk Rep.

#### **Meet on a regular basis.**

Real Talk Reps meet every Wednesday to review what is happening for the week ahead and explore how they might promote it via social media channels – community events, partnerships, planning of MTA events. To maximize their time, they also prep safe sex kits during these meetings. Each Rep also has an individual weekly meeting with staff to discuss what they plan to promote online.

#### **Choose social tools based on your audience.**

Real Talk Reps engage with youth using a number of online tools, including YouTube, Twitter, and Facebook.<sup>1</sup> Says Raul, “peer educators... have a good time” making videos on proper condom use and other sexual health topics.

#### **Make data-driven decisions.**

During weekly meetings, the team reviews Facebook insights, such as which posts have seen the most activity, and uses this information to increase visibility and impact. This has helped them understand who is using social media sites to connect with the program. Raul noted that based on data they collect online and offline, “older youth, in particular those between 20-24, know about events because of the social channels – Facebook, Twitter. Younger ones often hear about the organization in school.”

#### **Plan ahead.**

Raul highlighted the need to have a structure in place to stay organized. For the Real Talk DC staff, one useful element has been a shared Google document to map out upcoming social media activities. As Raul said, “We write down what needs to be communicated for the week. This is included in each youth’s work plan. It’s hard to remember everything, so writing it out as it comes up makes it much easier to remember.”

<sup>1</sup> YouTube: [www.youtube.com/user/realtalkdc](https://www.youtube.com/user/realtalkdc)  
Twitter: <https://twitter.com/#!/REALtalkDC>  
Facebook: <https://www.facebook.com/realtalkdc>

## HIPAA & Social Media

As a provider of services for people living with HIV or those at high risk for HIV, your organization has additional matters to consider: the Health Insurance Portability and Accountability Act (HIPAA). Within HIPAA, the disclosure of Protected Health Information (PHI) is regulated to safeguard an individual's personal information. PHI includes any information that may identify an individual, such as a name, date of birth, gender, or place of residence. And, of course, it includes one's HIV status.

Concerns over HIPAA are enough to cause unease about participating in social media; some organizations go so far as to block social media access on their network (a policy that often fails to truly prevent social media access – people often just use their phones

*Continued on page 21*

# Developing Policy

A good social media policy will empower employees to use these tools wisely, while protecting patient information, adhering to HIPAA, and creating a stronger link to the communities you serve. A social media policy can help to clear up confusion, address fears, and create a universal understanding of how social media can be used by staff and others who commit time to your organization (e.g., volunteers, board members, etc.).

## Where do I start?

It can be daunting to stare at a blank screen or piece of paper and write a social media policy. Luckily, there are a number of resources to help get you started.<sup>1</sup> Several of these tools are free and can provide you with a policy for you to customize once you respond to a brief series of questions about your organization (see Appendix 1 for an example policy).<sup>2</sup>

We recognize that even though there are tools that can help you, creating a social media policy takes work. Consider the following when developing a policy that reflects and respects your needs:

- Is the policy for staff, the public, or both?
- Do you want to provide basic guidance or precise instruction?
- Will you want everyone to read and understand the policy or just key individuals?
- Will the policy focus on specific tools or provide overall communications guidance?

<sup>1</sup> See <http://idealware.org/reports/nonprofit-social-media-policy-workbook> and <http://socialmediagovernance.com/policies.php> for additional examples and exercises. Accessed August 9, 2012.

<sup>2</sup> See <http://socialmedia.policytool.net/>. Accessed August 9, 2012.



## What should we include in our policy?

A social media policy may include items such as a social media definition, to whom the policy applies, expected online conduct, how staff should respond (if at all) to comments, how to respond to questions posed by the community (from basic information such as hours of operation to clinical questions), privacy considerations, personal versus professional use, ramifications for violation of the policy, and specific contacts for questions.

The Centers for Disease Control and Prevention (CDC) has created a policy focused on Facebook comments, explaining why and how they use this platform and providing guidance on what types of interactions can take place (see sidebar on page 22).

## What do I do with our social media policy?

Once you've developed a social media policy for your organization, chances are you will want others to know about it. This may only be relevant for a few key staff members, but generally it's wise to share these guidelines across the organization. This is particularly true if you think anyone working on behalf of your organization (paid or otherwise) may be using social media and mentioning your organization.

There are a number of ways to make your policy known. You could include internal policies in your employee handbook or post them in on your Intranet. Consider training staff to help them understand the policy's guidelines and to answer questions they may have. For new employees, make these guidelines a part of orientation. For more external policies, you could post them on your website or social media channels you might already be using, such as your blog, Facebook, or Tumblr.

Lastly, it is inevitable that you will learn as you go, and the policies you create may need to be refreshed or rewritten. Try to revisit your policies on a regular basis – even once a year – to ensure that they remain relevant and useful.

## HIPAA & Social Media

*(continued from page 20)*

instead to get on sites like Facebook). While the underlying intention is good – protecting the people they have committed to helping – it is likely far more effective to train staff, volunteers, and even clients on how to avoid violating HIPAA rules by being smart about sharing information on social channels.

That said, personal health information covered under HIPAA can be revealed on social networks. This is evidenced by the fact that people are increasingly using social media to discuss health matters for themselves or those they care about. However, there is a big difference between revealing something about yourself and revealing something about someone else.

## CDC Facebook Comment Policy:

*While we encourage fans to share thoughts and opinions on the CDC Facebook page, we expect that this will be done in a respectful manner.*

*CDC does not agree with or endorse every comment that individuals post on our pages. Our goal is to share ideas and information with as many individuals as possible and our policy is to accept the majority of comments made to our profile.*

*Therefore, a comment will be deleted if it contains:*

- *Hate speech,*
- *Profanity, obscenity or vulgarity,*
- *Nudity in profile pictures,*
- *Defamation to a person or people,*
- *Name calling and/or personal attacks,*
- *Comments whose main purpose are to sell a product,*
- *Comments that infringe on copyrights,*
- *Spam comments, such as the same comment posted repeatedly on a profile,*
- *Links to non-federal sites, and*
- *Other comments that the CDC Social Media team deems inappropriate.*

See <http://www.cdc.gov/SocialMedia/Tools/CommentPolicy.html> for full text

## Bringing it home:

- A social media policy can help to provide a universal expectation of online behavior, giving employees clarity on what is and isn't appropriate when they are representing your organization.
- You can have more than one policy (such as internal and external) if that makes sense for your organization.
- Your policy can range from very broad to highly specific, depending on your organizational culture and needs.
- Once you have a policy in place, make sure that those that need to abide by it a) knows it exists, and b) can find it easily.
- You can always update policies to reflect changes in tools or expectations. It's likely that as you learn more you'll have a better sense of your organizational needs, so periodic review of the policy is a good idea to keep it relevant.

## WORKSHEET 7 | Consider the Purpose of Your Policy

This worksheet will help you to consider the purpose of your social media policy, including who the policy is intended for, how specific or broad the policy should be, and how you will disseminate the policy.

**1. Which best describes the purpose of the policy you wish to create? Check one.**

- ☐ To provide internal guidelines for key staff who are in charge of social media activities
- ☐ To provide internal guidelines for ALL staff, regardless of their role in implementing official social media activities
- ☐ To provide external guidelines for the public for acceptable social media interactions through your channels
- ☐ To provide both internal guidelines for staff and external guidelines for the public

**2. How specific should your policy be? Check one.**

- ☐ Very: It should provide precise instruction for everything staff (or the public) should or shouldn't do online
- ☐ Somewhat: It should provide guidelines for standard tasks and typical situations
- ☐ Not Very: It should provide basic guidance to help staff (or the public) make their own decision

**3. Will your policy focus on specific tools or provide overall communication guidance? Check one.**

- ☐ Specific tools (please list which tools): \_\_\_\_\_
- ☐ Overall communication guidance

**4. How many staff members use their personal social media accounts to talk about your agency or their work? Check one.**

- ☐ None
- ☐ Some
- ☐ Many
- ☐ Not sure (If so, how will you find out?)

**5. Will you want all staff to read and understand the policy or just key individuals? Check one.**

- ☐ All staff
- ☐ Key individuals: \_\_\_\_\_



## WORKSHEET 8 | Guiding the Conversation

A well-crafted internal social media policy will inform staff what they should and shouldn't say or share online about your organization. This worksheet will help you to determine what types of information you will share online about your agency and your clients, and who is responsible for sharing information.

1. Who is in charge of all social media and social media strategy for your organization?
2. Who oversees (or will oversee) your communication activities and coordinate activities across different channels? This may be the same person as above.
3. What types of things do you encourage staff to post? Consider original content, reposts of other people's content, event promotions, community highlights, or other types of information. List these below.
  - 
  - 
  -
4. If staff were to ask themselves three questions before posting something, what questions would best ensure that the post aligns with your agency's communication goals and core values?
  - 1.
  - 2.
  - 3.
5. When, if ever, is it okay to post something that doesn't meet the criteria of these three questions?
6. What topics or types of information, if any, require approval prior to posting?
7. What topics or types of information should never be discussed on social media?
8. Who is in charge of approving and/or monitoring posts to ensure that they meet your guidelines?



## WORKSHEET 9 | Privacy Considerations

Your social media policy can help to ensure that staff does not share sensitive information about the work you do or the people you serve that would violate HIPAA or have other negative implications for your organization. This worksheet may help you think through how you will protect the privacy of your clients.

When is it OK to post?	Never	With Permission (From Whom?)	Always - This is Not an Issue	Under These Circumstances
Photos or videos where individuals aren't identifiable?				
Photos or videos with clearly identifiable clients?				
Photos or videos with clearly identifiable supporters?				
Photos or videos with clearly identifiable children?				
The full names of clients?				
Information about the services you've provided to a client?				
A location associated with a photo or video?				
A name associated with a photo or video? (e.g., "tagging them")				
Other:				
Other:				
Other				

ADAPTED FROM: The Nonprofit Social Media Policy Policy Workbook, Idealware, 2012. <http://www.idealware.org/reports/nonprofit-social-media-policy-workbook>. Accessed August 9, 2012.





## CASE STUDY:

# Developing a Social Media Policy

MICHAEL ANDERSON-NATHE AND ERNESTO DOMINGUEZ

The Cascade AIDS Project (CAP) is one of the few HIV-related organizations using social media that has a social policy as of June 2012. Similar to many other AIDS Service Organizations, CAP had a strong web presence and provided HIV information online. They weren't, however, using social media very much. That changed when CAP received funding from the U.S. Department of Health and Human Services Office of Minority Health to start CHATpdx. The goal of CHATpdx was to decrease new cases of HIV, particularly among young people of color. A big part of this work was to use social media.

To help build capacity in social media, CAP hired Ernesto Dominguez to be the Youth Technology Specialist. Ernesto didn't have experience running a program like this professionally, but he had experience using social media personally and was eager to put it to use to help prevent the spread of HIV. Explains Michael Anderson-Nathe, the Director of Prevention and Education Services, "If Ernesto didn't know about [a social media tool], he would learn it and figure out how best to use it."

Developing an internal social media policy wasn't an initial priority for CAP. But when CAP's Executive Director sent an organization-wide email encouraging staff to use Facebook and to promote the work of the organization, priorities shifted. "This is what pushed staff to ask a lot of questions. We weren't exactly prepared," explains Michael.

CAP decided to create a broader, less restrictive internal policy. Says Ernesto, "One of the best things we did as an agency was to not try to create rigid policies up front... It can be hard to predict what you need. You learn as you go, and evolve based on your experience." Michael agreed, adding, "The same standards that applied to personal interactions would apply to social media."

When asked for advice on creating a social media policy, Ernesto suggested involving staff in the creation of policy. "If there are policies that are to be implemented, make sure that the people doing the work are a part of the conversation."

*See Appendix 1 on page 44 for a sample Social Media Policy*

## AN EXCERPT FROM THE CAP SOCIAL MEDIA POLICY:

*Employees are encouraged to use the following guidelines in social networking practices when related to Cascade AIDS Project:*

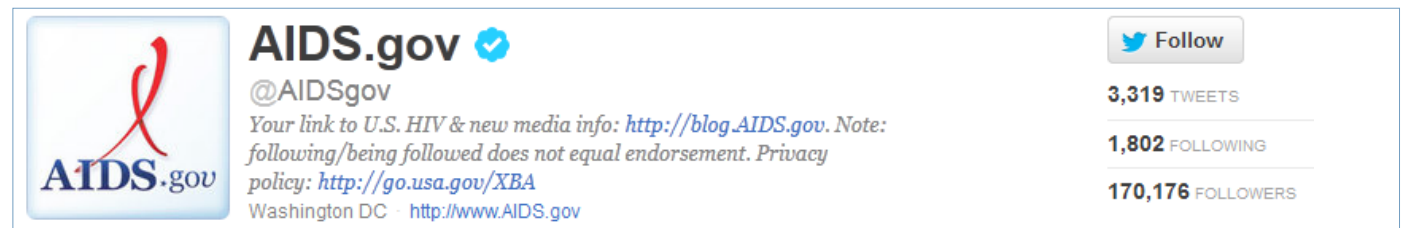
- *Be relevant to your expertise*
- *Do not be anonymous*
- *Maintain professionalism, honesty, and respect*
- *Apply a "good judgment" test for every post related to CAP: Could you be guilty of violating client confidentiality, is it negative commentary about CAP, could the post be damaging to CAP's future success?*

# Monitoring & Evaluation

Now that you're thinking about your social media strategy and policy, you might be wondering if the social media activities that you have planned (and possibly started to implement) are worth your time and effort. What does social media success look like for your organization? We'll walk you through some points to consider when thinking about monitoring and evaluating your social media activities.

## What can the numbers tell me?

When it comes to social media monitoring and evaluation, there are many components to consider such as quantitative measures (the numbers) and qualitative measures (i.e., the conversation and context). Examples of quantitative measures include: number of followers/likes, number of photos uploaded, the number of times a video has been viewed, and the number of people participating in an online chat. Many social media channels such as Facebook, Twitter, YouTube, and Flickr provide you with free “insights” or other tracking information. For example, the following image shows AIDS.gov's Twitter profile and tells us how many total tweets they have sent out, how many people are following them, and how many people they are following.



AIDS.gov Twitter Profile, <https://twitter.com/AIDSgov>

## What are realistic numbers for my organization?

When you're coming up with your target numbers – the numbers you hope to reach – it can be helpful to look at your peers' social media profiles to get a sense for their reach and what might be realistic for your organization. For example, AIDS.gov is large national federal government project, so their reach may be very different from that of a small local AIDS service organization (ASO). If you're a local ASO, you might want to look at other ASOs' Twitter profiles to determine a more realistic and meaningful benchmark.

## Going beyond the numbers

While numbers can be helpful, social media is really about “engagement.” One way to monitor your social media activities is to look at who is a part of your online community, what they are saying, and how they are engaging in a conversation with you and with each other.



Greater Than AIDS Facebook Page Post,  
<https://www.facebook.com/greaterthanaids>

For example, are people commenting on your Facebook posts? If so, who is commenting? What are they saying? Are people responding to each other's comments? Are they sharing your posts on their own Facebook pages? Many of these qualitative monitoring activities can often provide you with valuable information.

Combining quantitative and qualitative measures can help paint a more complete picture of your engagement and reach. For example, the Greater Than AIDS Facebook page post image to the left shows 53 comments, 109 “likes”, and 23 “shares” (people shared the post with their friends). However, reading the content of the comments provides insight into some of the discussion themes to really understand the conversation.

“







I posted a tweet on Mother's Day that took off – it was amazing. I didn't expect the reaction it got... Chain reactions show that people are paying attention.”

KRISHNA STONE  
GAY MEN'S HEALTH CRISIS

## What are some simple ways to monitor and evaluate social media activities?

In addition to the tools that are built into many social media platforms, some organizations use their own internal templates for monitoring and evaluating social media activities. These internal tracking summaries can be particularly useful for sharing with other team members who may not always be directly involved with social media activities but want to be kept up to date. You can also use these summaries to help inform future activities.

An internal social media monitoring and evaluation tool might be as simple as a short weekly internal email that lists metrics such as the number of new social network channel followers, interesting new followers, Facebook comments, and most popular retweets. It might be more of a monthly, quarterly, biannual, or yearly report that incorporates visuals such as graphs and screen shots of activities on your social media sites. Or it might be somewhere in between. Use a tool that will be most useful to you and your organization. Below is the AIDS.gov communication monitoring and evaluation schedule.

 <b>1</b>	<b>DAILY</b> Monitor and respond to blog and Facebook comments, Twitter mentions, retweets, and direct tweets.	 <b>3 months</b>	<b>QUARTERLY</b> Logic Model Progress-to-Date Report tracks progress towards stated goals and objectives, including communications activities.
 <b>7</b>	<b>WEEKLY</b> Social network site updates track how many followers we have on our social network sites (and compare these numbers to the previous week to monitor trends), tweets, and new and notable Twitter followers.  We use an online internal tracking system to document new and ongoing communications activities, and distribute a weekly internal report to capture these updates.	 <b>6 months</b>	<b>BIANNUALLY</b> Communications channel assessment looks at the current status and relationship of the blog and social network sites, progress toward objectives, and plans future directions. We assess comments, visitor traffic, and other analytics to identify trends, measure engagement, and see how the various channels are working together.
 <b>31</b>	<b>MONTHLY</b> Blog, social network sites, and video updates track number and types of posts, comments, and traffic (using Google Analytics, Feedburner, and built-in insights to track visitor traffic).  Monitor secondary focus presence/sites (such as Flickr and Foursquare), respond to comments and requests, and track updates.	 <b>12 months</b>	<b>ANNUALLY</b> Review and revise Communication Strategy.  Revisit AIDS.gov target audiences, mission, objectives, and activities.

Schedule of AIDS.gov Communication Monitoring and Evaluation Activities, <http://aids.gov/pdf/aidsgov-communication-plan-2012.pdf>

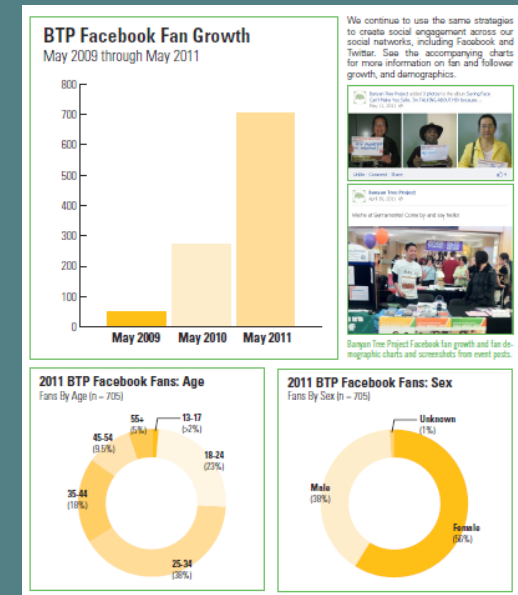
# Ready to begin or enhance your monitoring and evaluation activities?

A good starting point is to define *Specific, Measurable, Achievable, Relevant, and Time-bound* (SMART) social media objectives early on. This will help you to measure and evaluate how you're doing. If you haven't already developed SMART social media objectives, it's not too late. We've included a worksheet to help you think about your objectives and answer these questions: What is the specific social media objective that you want to track? How will you measure it? How realistic is it? What is the time frame in which you will measure it?

Another important consideration for social media monitoring and evaluation is that it's a fluid, moving, ongoing process, just like social media itself. Beth Kanter, a social media expert who works with nonprofits, uses the phrase "listen, learn, adapt." We would add the word "repeat" to the end, as it is activity you should do on a routine basis. By listening to the people you're engaging with, you can learn along the way and adapt your strategy based on what you learn. As you continue to listen, you may shift your strategy to best meet the changing needs of your audience (remember, that "p" in POST?).

## Bringing it home:

- Don't ignore the numbers, but remember that they only paint part of the picture.
- Listen to the online conversation (the who, what, why, how, etc.).
- Build in time to track engagement.
- Set Specific, Measurable, Achievable, Realistic, and Time-bound (SMART) social media objectives.
- Listen, learn, adapt. Repeat!



Banyan Tree Project Social Networking Report

The Banyan Tree Project's 2011 Social Networking Report<sup>1</sup> is an example of one way of analyzing and presenting social media information/metrics. This report focused on May, the month of National Asian and Pacific Islander HIV/AIDS Awareness Day. The report lays out Banyan Tree's online initiatives and social media campaigns, illustrating their overall reach, as well as information about the people they are reaching.

<sup>1</sup> See [www.banyantreeproject.org/extras/2012/2011\\_report.pdf](http://www.banyantreeproject.org/extras/2012/2011_report.pdf)



## WORKSHEET 10 | Social Media Metric Examples

This worksheet provides examples of the various quantitative metrics you can measure using free built-in tools on Facebook and Twitter as well as Google Analytics. If you're unsure what all of the lingo means, Appendix 2 includes a glossary of common social media terms.

Category	Facebook	Twitter	Blogs
Measurement Tool	Facebook Insights	Third Party Application	Google Analytics
<b>Views</b> <i>People that have seen your message</i>	<input type="checkbox"/> Impressions* <input type="checkbox"/> Reach**	<input type="checkbox"/> Total Followers <input type="checkbox"/> Total Retweets	<input type="checkbox"/> Blog Visits <input type="checkbox"/> Referral Sources
<b>Followers</b> <i>People signed up for your messages</i>	<input type="checkbox"/> Page Likes <input type="checkbox"/> Demographics	<input type="checkbox"/> New Followers <input type="checkbox"/> Lists	<input type="checkbox"/> Blog Subscribers <input type="checkbox"/> RSS Subscribers
<b>Engagement</b> <i>Interactions with your account/ messages</i>	<input type="checkbox"/> Comments <input type="checkbox"/> Likes <input type="checkbox"/> Shares <input type="checkbox"/> Feedback <input type="checkbox"/> Engaged Users	<input type="checkbox"/> Mentions <input type="checkbox"/> Retweets <input type="checkbox"/> Replies	<input type="checkbox"/> Comments <input type="checkbox"/> Reposts <input type="checkbox"/> Time Spent by Visitor
<b>Conversion</b> <i>Real-world results of your online initiative</i>	<input type="checkbox"/> New Volunteers <input type="checkbox"/> Donations <input type="checkbox"/> Event Registrations <input type="checkbox"/> Event Attendees <input type="checkbox"/> Link Click-throughs <input type="checkbox"/> Website Visits	<input type="checkbox"/> New Volunteers <input type="checkbox"/> Donations <input type="checkbox"/> Event Registrations <input type="checkbox"/> Event Attendees <input type="checkbox"/> Link Click-throughs <input type="checkbox"/> Website Visits	<input type="checkbox"/> New Volunteers <input type="checkbox"/> Donations <input type="checkbox"/> Event Registrations <input type="checkbox"/> Event Attendees <input type="checkbox"/> Link Click-throughs <input type="checkbox"/> Website Visits

\* **Impressions:** The number of times a post from your Page is displayed, whether the post is clicked on or not.

\*\* **Reach:** The number of people who were exposed to your message. The reach might be less than the impressions since one person can see multiple impressions.

ADAPTED FROM: Social Media Planning for Medical Reserve Corp Units, JSI, 2011.





## WORKSHEET 11 | Measuring Objectives

Consider how you will define and measure social media objectives that are SMART: *Specific, Measurable, Achievable, Relevant* and *Time-bound*. For example, you may want to promote a video you created on HIV rapid testing and shared via YouTube. An example of a SMART objective for this activity would be: “By July 31, 2013 [*time-bound*], increase views of HIV rapid testing video on YouTube [*specific and relevant*] from 25 to 200 [*measurable and achievable*].” Develop each objective by asking the following questions:

1. What are you **specifically** going to do? (e.g., drive traffic to your website? increase Twitter retweets?)

2. How will you quantify success or **measure** a change in the results of this activity? (e.g., measure website traffic? number of Twitter retweets?)

3. What is the **time frame** in which you will measure this activity?

4. Is this change **achievable**? Can you get it done in the proposed time frame with your available resources?

5. How will this activity be **relevant** to your overall goals and strategies?

**FILL IN THIS STATEMENT USING YOUR ANSWERS TO COMPLETE YOUR SMART OBJECTIVE:**

By [*When? Time-bound*] \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ , [*What will you do? Specific and relevant*] \_\_\_\_\_

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## WORKSHEET 12 | Before and After Assessment

The questions in this activity may help you think through the process of simple, ongoing evaluation efforts and to make changes to your social media strategy in the future.

BEFORE	AFTER
What did you plan to do?	What actually happened?
	How could you have improved?
What did you think would happen?	What did your audience think?
	What would you do differently next time?

ADAPTED FROM: Beth Kanter and WeAreMedia, 2011. [http://bethemedia.wikispaces.com/file/detail/wearemedia\\_handouts.doc](http://bethemedia.wikispaces.com/file/detail/wearemedia_handouts.doc). Accessed August 9, 2012.



## CASE STUDY: Monitoring Social Channels

### KRISHNA STONE, GAY MEN'S HEALTH CRISIS

When Krishna Stone started working at Gay Men's Health Crisis (GMHC) 19 years ago, she wasn't thinking about social media. However, for the past few years she has found herself increasingly using social media to engage with supporters. According to Krishna, "a few years ago we were able to get some initial training, and boom – we were off."

GMHC doesn't currently have any staff dedicated solely to social media. To keep the work load manageable, several GMHC staff members monitor specific tools; Krishna monitors Facebook and Twitter, two major social channels for the organization. She acknowledges that monitoring social media is not a 9-to-5 job. "It never ends. It doesn't stop Friday night. If something blows up you have to be ready." Krishna checks in on Facebook and Twitter regularly, making sure to do so more frequently if GMHC has a particularly visible activity taking place. For example, when comedian Lisa Lampanelli was on the television show *Celebrity Apprentice* in May 2012 and selected GMHC as her charity of choice, Krishna spent extra time monitoring Facebook to keep a close watch on the increased level of activity.

While this monitoring activity can be arduous at times, Krishna knows that social media is an important part of GMHC's work. "Our development department uses the social media information when speaking with sponsors," offered Krishna as one example of how the information is used to support offline activity.

Krishna finds that social media monitoring can also be rewarding and believes this qualitative feedback is a vital supplement to the quantitative information created via tools like Facebook Insights. She says, "There are small moments of success that are so sweet, and keep the momentum going... moments where someone will give us feedback that is incredibly emotional – for example, a woman whose mother died of AIDS thanks us for being there, and I know her ability to reach out and make the connection was facilitated by social media. That is really beautiful."

# Taking the Next Step

This workbook, combined with our first social media toolkit, provides guidance as you continue to learn about and employ social media within your HIV work. If there is one lesson to take away from all of this, it's that social media is just that – social. Social media is at its best when used to connect with other people and organizations. It's about community. It's about sharing and learning from each other. We encourage you to foster relationships with others that may be doing something you can emulate and in turn help others who are in need of assistance.

Just like you, we are learning how to best use social media and welcome the opportunity to connect with you via Facebook and Twitter.<sup>1,2</sup> And we know that it takes more than a workbook to feel confident and get your questions answered. To that end, know that we are prepared to help you beyond this document! If in-person technical assistance is what you need, contact us at D-CALS@nmac.org and we will arrange for in-person training.

All of us at NMAC look forward to learning with you, and from you, as we share this journey of ending the AIDS epidemic.

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1 Find us on Facebook at <https://www.facebook.com/NMACCommunity>

2 Find us on Twitter at <https://twitter.com/#!/NMACCommunity> (if you are already on Twitter, just search for nmaccommunity).

# Resources

## HIV Prevention Goes Social: Using Social Media to Create, Connect & Come Together

This NMAC toolkit includes basic information on how the HIV community is using social media for prevention and delivery services and provides a basic introduction to the more common social media tools.

<http://bit.ly/nmacsmtoolkit>

## CDC Guide to Writing for Social Media

This free guide provides guidance and lessons to help you write more effectively using multiple social media channels, particularly Facebook, Twitter, and mobile text messaging.

<http://www.cdc.gov/SocialMedia/Tools/guidelines>

## The Nonprofit Social Media Policy Workbook

Free workbook providing guidance and examples to create social media policy for your organization.

<http://www.idealware.org/reports/nonprofit-social-media-policy-workbook>

# APPENDIX 1 | Sample Social Media Policy

The following sample social media policy was generated by using the free tool provided by Policy Tool for Social Media (<http://socialmedia.policytool.net>). By answering 12 questions (largely with yes/no responses) a draft policy is generated, which you can use as the basis for your own policy if you so choose. In this case, a mock agency called “Care to Connect AIDS Services Organization” with a fake employee named Ima Networker was used to craft a social media policy.

As you review the following paragraphs, ask yourself:

- What aspects of this policy work for my organization?
- What aspects of this policy would need to be cut or adapted?
- Who would need to be involved in the discussion?
- Where would this policy be stored? Who would have access?

## C2C SOCIAL MEDIA POLICY

This policy governs the publication of and commentary on social media by employees of Care to Connect AIDS Service Organization and its related companies (“C2C”). For the purposes of this policy, social media means any facility for online publication and commentary, including without limitation blogs, wiki’s, social networking sites such as Facebook, LinkedIn, Twitter, Flickr, and YouTube. This policy is in addition to and complements any existing or future policies regarding the use of technology, computers, e-mail and the internet.

C2C employees are free to publish or comment via social media in accordance with this policy. C2C employees are

subject to this policy to the extent they identify themselves as a C2C employee (other than as an incidental mention of place of employment in a personal blog on topics unrelated to C2C).

Publication and commentary on social media carries similar obligations to any other kind of publication or commentary.

All uses of social media must follow the same ethical standards that C2C employees must otherwise follow.

### **Setting up social media**

Assistance in setting up social media accounts and their settings can be obtained from C2C’s Ima Networker.

### **Do not tell secrets**

It’s perfectly acceptable to talk about your work and have a dialog with the community, but it’s not okay to publish confidential information. Confidential information includes things such as unpublished details about our software, details of current projects, future product ship dates, financial information, research, and trade secrets. We must respect the wishes of our corporate customers regarding the confidentiality of current projects. We must also be mindful of the competitiveness of our industry.

### **Protect your own privacy**

Privacy settings on social media platforms should be set to allow anyone to see profile information similar to what would be on the C2C website. Other privacy settings that might allow others to post information or see information that is personal should be set to limit access. Be mindful of posting information that you would not want the public to see.



## APPENDIX 1 | Sample Policy (Continued)

### **Be honest**

Don't blog anonymously, using pseudonyms or false screen names. We believe in transparency and honesty. Use your real name, be clear who you are, and identify that you work for C2C. Nothing gains you notice in social media more than honesty - or dishonesty. Don't say anything that is dishonest, untrue, or misleading. If you have a vested interest in something you are discussing, point it out. But also be smart about protecting yourself and your privacy. What you publish will be around for a long time, so consider the content carefully and also be cautious about disclosing personal details.

### **Respect copyright laws**

It is critical that you show proper respect for the laws governing copyright and fair use or fair dealing of copyrighted material owned by others, including C2C own copyrights and brands. You should never quote more than short excerpts of someone else's work, and always attribute such work to the original author/source. It is good general practice to link to others' work rather than reproduce it.

### **Respect your audience, C2C, and your coworkers**

The public in general, and C2C's employees and customers, reflect a diverse set of customs, values and points of view. Don't say anything contradictory or in conflict with the C2C website. Don't be afraid to be yourself, but do so respectfully. This includes not only the obvious (no ethnic slurs, offensive comments, defamatory comments, personal insults, obscenity, etc.) but also proper consideration of privacy and of topics that may be considered objectionable

or inflammatory - such as politics and religion. Use your best judgment and be sure to make it clear that the views and opinions expressed are yours alone and don't represent the official views of C2C.

### **Protect C2C clients, business partners and suppliers**

Customers, partners or suppliers shouldn't be cited or obviously referenced without their approval. Never identify a customer, partner or supplier by name without permission and never discuss confidential details of a customer engagement. It is acceptable to discuss general details about kinds of projects and to use non-identifying pseudonyms for a customer (e.g., Customer 123) so long as the information provided doesn't violate any non-disclosure agreements that may be in place with the customer or make it easy for someone to identify the customer. Your blog is not the place to "conduct business" with a customer.

### **Controversial issues**

If you see misrepresentations made about C2C in the media, you may point that out. Always do so with respect and with the facts. If you speak about others, make sure what you say is factual and that it doesn't disparage that party. Avoid arguments. Brawls may earn traffic, but nobody wins in the end. Don't try to settle scores or goad competitors or others into inflammatory debates. Make sure what you are saying is factually correct.

## APPENDIX 1 | Sample Policy (Continued)

### **Be the first to respond to your own mistakes**

If you make an error, be up front about your mistake and correct it quickly. If you choose to modify an earlier post, make it clear that you have done so. If someone accuses you of posting something improper (such as their copyrighted material or a defamatory comment about them), deal with it quickly - better to remove it immediately to lessen the possibility of a legal action.

### **Think about consequences**

For example, consider what might happen if a C2C employee is in a meeting with a customer or prospect, and someone on the customer's side pulls out a print-out of your blog and says "This person at C2C says that product sucks."

Saying "Product X needs to have an easier learning curve for the first-time user" is fine; saying "Product X sucks" is risky, unsubtle and amateurish.

Once again, it's all about judgment: using your blog to trash or embarrass C2C, our customers, or your co-workers, is dangerous and ill-advised.

### **Disclaimers**

Many social media users include a prominent disclaimer saying who they work for, but that they're not speaking officially. This is good practice and is encouraged, but don't count on it to avoid trouble - it may not have much legal effect.

The Ima Networker can provide you with applicable disclaimer language and assist with determining where and how to use that.

### **Don't forget your day job**

Make sure that blogging doesn't interfere with your job or commitments to customers.

### **Social media tips**

The following tips are not mandatory, but will contribute to successful use of social media.

The best way to be interesting, stay out of trouble, and have fun is to write about what you know. There is a good chance of being embarrassed by a real expert, or of being boring if you write about topics you aren't knowledgeable about.

Quality matters. Use a spell-checker. If you're not design-oriented, ask someone who is whether your blog looks decent, and take their advice on how to improve it.

The speed of being able to publish your thoughts is both a great feature and a great downfall of social media. The time to edit or reflect must be self-imposed. If in doubt over a post, or if something doesn't feel right, either let it sit and look at it again before publishing it, or ask someone else to look at it first.

### **Enforcement**

Policy violations will be subject to disciplinary action, up to and including termination for cause.

# APPENDIX 2 | Social Media Glossary

## Blogs

**Blog:** Derived from the term “web log.”

**Post/Entry:** Individual articles that make up a blog.

**Comments:** Users can comment on posts and respond to other user’s comments. Comments can either be moderated or be posted automatically.

**Categories:** A collection of topic-specific posts.

**Tags:** Labeling posts with keywords to collect similar posts.

**Tag Cloud:** Displaying a list of tags or keywords in a blog.

**Blog Roll:** List of links to other blogs from your blog.

**Web/RSS Feed:** “RSS” stands for “Really Simple Syndication.” With an RSS feed, you subscribe to a particular website and automatically receive updates via email or a news reader.

## Facebook

**Like:** Clicking “Like” is a way to give positive feedback and for users to connect with things they care about.

**Share:** Clicking “Share” allows you to share a Facebook post (e.g., message, link, or image) with your contacts.

**Page:** Organizations, businesses, and brands use Pages to connect with people instead of Profiles.

**Profile:** Individuals create Profiles to connect with other people on Facebook.

**Timeline/Wall:** Your collection of the photos, stories, and experiences that tell your story. Other users can post messages and photos to your timeline/wall and like, comment, or share your posts.

**Friends:** People you connect and share with.

**Groups:** Provide a closed space (public or private) for small groups of people to communicate about shared interests.

*Facebook’s Glossary:* <http://www.facebook.com/help/glossary>

## Flickr

**Photostream:** All of the photos you have uploaded, with the most recent photos displayed first. The default view for anyone viewing your page.

**Sets:** Groups of photos created by you, like an album.

**Collections:** Groups of photos, sets, or other collections.

**Groups:** Groups can either be public or private. Every group has a pool for photos and/or video and a discussion board for talking. There are administrators and members.

## Twitter

**Tweet (noun):** A message posted via Twitter containing 140 characters or less.

**Tweet (verb):** The act of posting a message, or “tweet,” on Twitter.

**Retweet:** Sharing a tweet written by another user to spread news or share information.

**Handle:** A Twitter username.

**# (Hashtag):** This sign is used to mark keywords or topics in a tweet and categorize messages.

**@ (At):** This sign is used to call out or link to specific users on Twitter. The @ sign proceeds the Twitter handle.

**Mentions:** Tweets in which your username was included with the @ sign.

**Followers:** Another Twitter user who has followed your tweets.

**Lists:** Curated groups of other Twitter users. Used to tie other users into a group on your Twitter account.

**Direct Message (DM):** Tweets that are private messages between the sender and recipient. You can only DM someone that is following you.

**Short URL:** Used to save space by turning long URLs into shorter URLs (e.g., bit.ly, ow.ly, etc).

*Twitter’s Glossary:* <https://support.twitter.com/entries/166337-the-twitter-glossary>

## YouTube

**Channel:** A user’s page for their videos, or YouTube’s equivalent of a profile. Nonprofit organizations can apply for a designated “Nonprofit” channel at <http://www.youtube.com/nonprofits>.

**Subscriber:** Someone who subscribes to your channel to receive automatic updates when you post a new video.

**Playlist:** A collection of videos that you create that can be watched on YouTube, shared with others, or embedded on a website.

**Likes:** Users can “like” or “dislike” a video by clicking the thumbs up or thumbs down buttons.

**Comments:** Users can comment on your videos and engage in discussion with other users.

## APPENDIX 3 | Organizations and Groups Utilizing Social Media Referenced by this Workbook

AIDS.gov

<http://www.AIDS.gov>

The Banyan Tree Project

<http://www.banyantreeproject.org/>

Centers for Disease Control and Prevention

<http://www.cdc.gov/socialmedia/>

Cascade AIDS Project

<http://cascadeaids.org/>

Healthy Black Communities

<http://www.hbc-inc.org/>

Gay Men's Health Crisis

<http://www.gmhc.org/>

Greater Than AIDS

<http://www.greaterthan.org/>

Metro Teen AIDS

<http://metroteenaids.org/>

## APPENDIX 4 | EXTRA WORKSHEET | Target Audience Assessment

This activity builds on the previous Listening Activity to help you consider who you are trying to reach and how your target audience is – or is not – using social media. This information will help you choose the most appropriate social media tool to reach your audience later on. For the following exercise, make your best estimate if you don't know specifics. You will likely work with diverse audiences that have different media habits and information needs. Copy and reuse this worksheet as needed. Use one sheet per audience.

1. Who are you trying to reach with your social media activities and/or overall communication activities? Can your target audience be divided into more specific segments, and if so, how? (e.g., Hispanic youth, African American youth, LGBTQ youth)

2. What portion of your target audience:	NONE	SOME	MOST	ALL	DON'T KNOW
Doesn't use social media at all (personally and/or professionally)					
Read social media without joining (e.g., reads blog posts and tweets, but do not reply or respond)					
Join social media platforms (e.g., Facebook, Twitter, Linked In)					
Create content and share it with social media (e.g., posts, pictures, videos)					
Share links or other content on social media					
Use social media to make health decisions					
Use social media to share health information					

3. What types of health information is your target audience seeking online? If you don't know, how could you find out? (e.g., listening, asking them)

ADAPTED FROM: AP42 Social Media Workbook, Masters of New Marketing. <http://ap42.com/socialmediaworkbook>. Accessed August 9, 2012



## APPENDIX 5 | EXTRA WORKSHEET | Strategic Campaign Planning Framework

This worksheet will help you to plan and implement your first social media campaign. Think of your social media strategy as a series of campaigns, each with a specific goal. For example, you may have one campaign to encourage people to get tested for National HIV Testing Day and another campaign to recruit volunteers for a specific event. This activity uses the POST framework (detailed on page 3) to develop an approach to your campaign. Copy and reuse this worksheet as needed.

### CAMPAIGN NAME (PROJECT/ACTIVITY):

**PEOPLE.** Who are you trying to reach? How are they using social media? If you don't know, how could you find out?  
*Refer to Worksheet 2: Target Audience Assessment.*

**OBJECTIVES.** What are you trying to accomplish?

**STRATEGY.** How will your efforts support your objectives? And assume you are successful. What will be different when you are done?

**TECHNOLOGY/TOOLS.** What tools best support your objective(s) and your audience's needs?

**MONITORING/EVALUATION.** How will you track and measure success?

ADAPTED FROM: Bernoff J. The POST Method: a systematic approach to social strategy, and The Nonprofit Social Media Decision Guide, Idealware, 2010.

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