

Based on workshops, blog posts, and other material created by **Beth Kanter**

http://www.bethkanter.org

**Trainer’s Guide: Workshop 1**

**Social Media & Networked NGOs**

**Overview & Strategic Planning**

**E-Mediat: Trainer’s Guide  
Workshop 1:**

**Social Media and Networked NGOs Overview and Strategic Planning**

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# Overview: E-Mediat Workshops

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| --- | --- |
| **Workshop** | **Description** |
| **Workshop 1: Social Media & Networked NGOs Overview and Strategic Planning** Day 1: Introduction to social media for civil society and networked NGOs: Principles of  best practices in social media Day 2: Creating your social media strategy plan Day 3: Coaching in small groups and one-on-one for NGOs and CSOs: Training on how to use OLC | **Day 1 is an overview of social media and examples. Day 2 provides a framework for creating a social media strategy plan. Day 3 is focused on coaching NGOs on their plans in addition to training on the Online Learning Community.** |
| **Workshop 2: Listening and Web Presence** Day 1: Listening, security, and privacy Day 2: Strategic internet presence: Blogs  and/or websites | Day 1 shares techniques and tools for scanning and listening on social media channels, including how to set up and use a simple listening dashboard. Day 2 focuses on how to improve an existing web presence and/or setting up a blog, so they serve as an online home base for the NGO and links to the social media strategy plan. |
| **Workshop 3: Social Networks** Day 1: Using Facebook strategically for NGOs Day 2: Using Twitter strategically for NGOs | In workshop 3, participants will learn how to use Facebook and/or Twitter and link to their social media strategy plan. If Twitter is not relevant for the participants, the Facebook workshop can be delivered in two days – with hands-on time and shoulder-to-shoulder learning. |
| **Workshop 4: Storytelling with Digital Video** Day 1: How to use simple video tools to support your social media strategy plan (*Part I)* Day 2: How to use simple video tools to support your social media strategy plan (*Part I)* | This hands-on workshop will teach participants how to use storytelling principles to create compelling videos that can be part of a content strategy for a blog, website, or Facebook. Participants will learn how to use simple video tools including FLIP camera, editing software, and YouTube. |
| **Workshop 5: Mobile Strategy** Day 1: An overview of text messaging campaign and the mobile generation Day 2: Sharing social media strategy plans and learning | Workshop 5 will provide an overview to mobile tools and the mobile generation. As the last workshop, participants will have the opportunity to showcase their social media strategy plans and share what they have learned. |

**For each Workshop Day, the Trainer’s Guide will include:**

**1. Participant Agenda:** This one page handout is a simple version of the agenda which includes times and session titles. This document can easily be printed and distributed to participants.

**2. Trainer’s Agenda/Outline:** This section will be a detailed version of the participant agenda and include learning goals, times/titles, and the following detailed information:

- Learning goals

- Content to share

- Timing

- Instructions for the trainer on how to facilitate a discussion or lead an exercise

- Description of materials, such as checklists, PowerPoint decks, or additional resources

**3. Workshop Materials:**

- PowerPoint Deck: The entire workshop will be in one PowerPoint deck. Additional detailed notes about what to say and points to cover will be included in the *notes section* of the slide. You should print a *notes version* of the PowerPoint, which will include talking points and additional instructions for your presentations.

- Templates & Worksheets (If word document, this will follow the trainer’s outline)

- Online Resources (http://emediat.wikispaces.com/Tool+Box) and the Online Learning Community (OLC)

Workshop 1: Pre-Training

Welcome to the Trainer’s Guide for Workshop 1. This section offers tips and resources for preparing for your first workshop. Remember, you are not alone –you can reach out with questions on the Online Learning Community site.

Setting Participant Expectations

The program outcomes are:

* Increase CSO/NGO knowledge, access and skills to use new media effectively and to advance their unique missions thereby strengthening their organizations
* Improve communication between CSO/NGO leaders and key stakeholders
* Improve communication between CSO/NGOs and their communities of peers around the world
* Improve communication between CSO/NGOs and governments in the MENA region

The five-workshop agenda is an intense schedule and a lot to cover and implement in a very short time frame. While you will be exposing participants to many new ideas, tools, and techniques, it is not an expectation that every organization will implement all tools presented in the workshops at the deepest level to reach the above outcomes.

Social Media in the Arab World1

When talking about the use of social media in the Arab world, we have to take into account many differences from other parts of the world. It's easy to find guides and tools written and built from a Western perspective, but not from an Arab perspective. Some points you may want to discuss with participants:

* The internet is not as well-developed in the Arab world as in other parts of the world, which means that internet literacy also lags
* Infrastructure varies by country and within countries. Internet and social media use varies greatly from country to country. It can be noted that Facebook is very popular throughout the region.
* Social media is seen as a useful bridge to Western media and government, as evidenced in Tunisia and Egypt
* Cost of internet access and telecom on average is higher in many Arab countries than in other parts of the world
* Arabic content makes up less than about 1 percent of all web content, meaning that web use often implies having to work in a second language and culture
* Traditional media is widely controlled by the state and/or political parties, and is sometimes censored
* Mobiles may be more useful in rural areas and/or high mobile penetration countries
* Broadly speaking, Arab culture relies more on information from social ties than from official institutions or data

1Content from this section comes from the Training of Trainers in Beirut, Lebanon organized by Social Media Exchange (SMEX)

* Privacy and security issues differ from those in the West, especially with regard to government surveillance and spam
* We must be more careful of how we represent others, so as to not unknowingly expose their identity
* We must know our media environments and laws, so that we understand the risks of, for example, allowing others to publish and/or contribute to our online presence

Source: http://emediat.wikispaces.com/Arab+Social+Media

Given these challenges, social media may more often be an indirect pathway to change as compared to other methods, though still important. Identifying clear objectives and target audience is critical.

Assessing Participants: Maturity of Practice Model  
*Crawl, Walk, Run, Fly*

Effective social media strategy isn’t about using as many tools as possible. What it does take to succeed is the ability to improve practice in small steps. *Crawl, Walk, Run, Fly* is a maturity of practice model that can help NGOs reach the next level and improve how they are using social media to reach civil society goals.

Many NGOs in other parts of the world are not successful using social media because:

* They don’t have a methodical, well-thought out communications plan that links to their social media strategy
* They try to be on too many different social media sites without the capacity or strategy to support effective implementation
* Staff do not have the time or skills to implement a social media plan on an ongoing basis
* People in the organization do not see the value of using social media or have the desire to want to learn a different way of working
* Social media requires sharing control of your organization’s branding, having conversations with stakeholders online, and other ways of working that are new and may be uncomfortable
* They lack a way to measure their social media strategy success, document results, and reflect on how to improve upon what they are doing

At the *Train the Trainers* workshop, we discovered that many of these listed challenges are true for NGOs in the Arab World as well (http://www.bethkanter.org/emediat-day2/).

This is why this curriculum is based on the idea that NGOs can be successful in using social media if they take small, incremental and strategic steps. As a social media trainer, you need to identify what stage of practice the participants are in and help them get to the next level. In this model, there are four different levels of social media practice. These are classified as *Crawl, Walk, Run, Fly.* One level is not better than another; it is just where the organization is at with respect to use of social media.

It is important to note that it takes months, if not years, to reach the highest level of practice. Not every nonprofit will go through the levels at the same pace due to organizational culture, capacity, or communication objectives and target audiences. The goal of training and technical assistance is to help NGOs improve by getting to the next level. If they can’t fly, then they can run. If they can’t run, then they can walk. If they can’t walk, then they can crawl. The idea is to keep improving.

Also, as with all frameworks, when you apply you see that the reality is messy. It might hard to categorize NGOs. And, it is a very subjective placement. The framework is a way to structure your thinking about delivering social media capacity building and training.

**Crawl**

The NGO is not using social media or is not using it consistently. They lack a strategic communications plan and may not have a website, or they do have a website but it is not updated with content. They need to see inspiring stories of other NGOs from their context and in other places of the world. The first step is to develop a basic communications strategy, particularly identifying a SMART objective, audience, messaging, web presence, tactics, and implementation. The first social media step should be listening and setting up a web presence. In some cases, the NGO may need to develop a basic communications plan.

**Walk**

The NGO is using one or more social media tool consistently, but it is not strategic and best practices or techniques for the tools are not being used. They have a basic web presence that represents their communications goals and is up to date. Their social media presence is not linked to a campaign, communications objective, or civil society outcome. They need assistance developing a social media strategy to support short and long-term SMART objectives. They will need to focus on listening, engagement, and content best practices. The NGO’s leadership may not understand social media or be open to its use. There may not be a designated person responsible for social media implementation.

The NGO needs to focus on one or two social media tools and improve practice and avoid doing too much on too many tools. The NGO needs to incorporate ways to build capacity. For example, staff members may need to evaluate their current job tasks and identify tasks that can be deleted in order to make time to do social media. Or, the organization may need to consider how to reach out to volunteers, interns, and/or others who can assist. In some cases, it may mean hiring an additional staff person.

The NGO may also need to develop a social media policy, in part, as an opportunity for people in the organization to understand the value and vision for social media use. Finally, it is important for the NGO to learn and use simple measurement techniques to improve practice and document results.

**Run**

The NGO uses one or more social media tools and is strategic, however techniques could be improved and networked nonprofit concepts could be integrated. Organizations in this category also need to focus on using measurement techniques. They need assistance with how to identify and use best practices with social media tools against metrics and campaign or other SMART objectives. They can be introduced to concepts of networked approaches and strategies by sharing similar organizational success stories. Finally, they could receive assistance in identifying ways to expand capacity through the network or staff.

**Fly**

The NGO uses two or more social media tools strategically, applies network concepts, and regularly uses best practices, measurement metrics, and improvement strategies. These NGOs will be good case studies and mentors to others in the group. They will need assistance with reflection techniques and improvement. They can learn advanced techniques for social media best practices and should work closely with a social media strategy advisor.

What Does Flying Look Like? Essential Social Media Practices

An organization at the *Fly* level is doing all practices listed below at an advanced level. It is important to understand that not all participants will end the program at the *Fly* level.

|  |  |
| --- | --- |
| Practice | Standard |
| Strategy | |
| Identified SMART Objective | SMART objective identifies measurable, achievable, realistic, and timely results |
| Identified Specific Target Audience | Specific audience target groups are identified and include key stakeholders and influencers |
| Selection of Social Media Channels | Selects social media tools that match audience and capacity |
| Leadership Support | Management understands and supports social media as part of the overall communications plan |
| Social Media Policy | Has formally identified appropriate personal and organizational use |
| Listening Research | Had done research to learn what other organizations are doing and what the conversations are |
| Allocates Sufficient Resources | Understands capacity to implement by hiring staff or having social media tasks in job description or recruits volunteers |
| Implementation | |
| Tools selection | Uses best practices on selective number of social media tools that match audience and capacity to implement |
| Engagement | Takes steps to foster online engagement and conversations related to strategic objectives |
| Content | Has an editorial calendar and strategy for linking, producing, and distributing content across social media and other channels |
| Network Building | Takes steps to foster online community or networked effects |
| Job Description and Training | Appropriate training is provided to those people who are responsible for implementation |
| Involves all staff | Social media is not an isolated function – most if not all staff or volunteers have some knowledge or participate as appropriate. |
| Build Valuable Partnerships | Relationships have been made with stakeholders and other organizations to achieve goals |
| Measure, Monitor, Evaluate | Activities are monitored, measured, and evaluated to improve |
| Integration | |
| Web Site | Strategic linkages and integration between social media and web site include: link, content, and distribution |
| Other Social Channels | Strategic cross-promotion and integration between social channels |
| Print Materials | Strategic links between social media and printed materials |
| E-Mail Marketing | Strategic links between social media and email newsletters |
| Mobile | Strategic links between social media and mobile |
| Offline | Strategic links between offline activities and social media channels |

How to Determine Where Participants Fit in the Maturity of Practice Model

This is what you will spend the morning of the first workshop with participants working on. It is a “living assessment.” The facilitator’s questions and exercises will help you and the entire group to understand what the range of experience and needs are in the room. In addition, you can learn a lot by reviewing the web presence and social media use of participants in advance of the workshop.

1. Prior to the workshop, review the websites and social media presence of participants and the information in their applications.
2. Use the *Flying* best practices on page 7 to assess whether or not the organization is using these practices.
3. Visit the NGO’s web site and ask these questions:
   1. Does their website clearly articulate their marketing and communications goals?
   2. What is the quality of the content? Is the content up to date?
   3. Have they linked their social media presence to the website? If so, take a look at their social media use. Is it active and vibrant or inconsistent and inactive?
4. Include any notes about what you already know about the NGO.
5. Place the organizations in the *Crawl, Walk, Run, or Fly* category. It will be very subjective, but it will give you a great understanding of your audience. (See example below from Lebanon)

**Below, please find a preliminary review of some of the NGO applicants from Lebanon. Without having much background knowledge about the organization they could be placed in the following categories:**

* **RDFL-Women:** The web content does not look up to date and there is no evidence of social media use. Focus on improving web presence, linking social media/web presence to communications strategy, and capacity issues. <http://www.rdfl-women.org/index.htm>

**Crawl**

* **Associate Najdeh:** The web content does not look up to date and there is no evidence of social media use. They need to focus on improving web presence, linking social media/web presence to communications strategy, and capacity issues. <http://www.association-najdeh.org/>
* **Medical Islamic Association:** The top page of their website works, but once you explore other pages, there are many problems. They need to focus on improving web presence, linking social media/web presence to communications strategy, and capacity issues. <http://www.hdclebanon.com/>
* **Right To Play:** This organization has a well-developed web presence and is using “share this” button and YouTube Videos. It is unclear how the regional offices coordinate with the national office in setting up a web or social media presence. The first step here would be for the organization to begin a planning conversation about this. <http://www.righttoplay.com/International/Pages/Home.aspx>

**Walk**

* **Fadila Fattal Literary Salon:** This organization is on Facebook, but does not appear to have a web presence. Their next step would be to set up a blog or web site as their “home base” and, if their objective is to engage audiences, help migrate them from a Facebook Group to a Facebook Page. <http://www.facebook.com/group.php?gid=118131051540530>
* **Jinan University:** They have a good web presence and links to social media presences, including Twitter, Flickr, LinkedIn, and Facebook. They set up a Twitter presence but are not using it. They have a Facebook Group with almost 500 participants. <http://site.jinansystem.com/index.html>; <http://www.facebook.com/group.php?gid=4868627163>; <http://twitter.com/#!/JinanUniversity>
* **Lebanese Center for Human Rights:** This organization has a Facebook and Twitter presence and it is integrated on its website. Look to see if their social media use is aligned to campaigns or organizational goals. <http://www.solida.org/>

**Run**

* **Nasawiya:** This organization is not a participant, but is a good example of an NGO in Lebanon that is at the *Fly* level of social media practice. <http://www.nasawiya.org/web/>

**Fly**

How to Create Localized *Living Case Studies*

The slide decks will provide examples from the United States, but we encourage you to also include examples from your countries. Day 1 of this workshop will use the *Living Case Studies* method as part of the assessment process. Here’s how it works:

1. Identify one example from each category or pick out two or three of the NGOs that are at the highest level.
2. Take a screen capture of their website and social media channels.
3. Include a brief description from the application of their communications objective and target audience.
4. Invite them to the front of the room and do an interview:
   1. What is your organization’s purpose?
   2. Who is the audience?

Online Resource

You can download an older version of SnagIt for free at: http://www.oldapps.com/SnagIT.php

* 1. How are you using social media? Tell us a success story!
  2. What are your challenges?
  3. What advice would you give to others?

1. Have the training coordinator or other person on your team take notes on the answers. This case study can become a blog post after the workshop and can be used at other workshops.

Tips for Leading Social Media Workshops

You are most likely going to have different levels of practice in the room – from novices to more experienced individuals. There are so many social media tools and so many different types of technology that is impossible for one person to know all the answers. Here are some tips to help you feel more comfortable in this role:

* Acknowledge the different levels in the room. You can set this up as part of your framing of the agenda that you have different levels of experience. For some who are more advanced, the pace may seem too slow. For those who are beginners, the pace may seem too fast. Ask people in the room to help. Encourage the beginners to ask questions. Encourage the advanced students to answer the questions.
* Make use of the social media strategic advisor on your team to help you answer questions. You can do this even if they are not in the room with you. For example, you can share their Twitter profile with the group and model asking the strategic advisor questions on Twitter or model posting questions to the OLC.
* Since you will be using the assessment model as part of the instruction, you will easily find out who has knowledge in the room and who does not. Make use of the expertise in the room. If you find an NGO that is at a more advanced level, make them your assistant. Use their organization as an example in the presentation.
* It’s okay to say “**I don’t know.”** But do refer them to another person in the room or on Twitter, or a resource online that can help answer their question. You can also use the “parking lot” method by including a flip chart sheet and list questions that you will post on the OLC or research later.

Pre-work Assignment for Participants

This pre-assignment can be emailed to participants in advance of the first workshop. Program participants should come prepared to the workshop by having answered the questions below, read the first chapter of *The Networked Nonprofit*, and thought through the reflection question. Details on each of these assignments can be found below:

**Questions**

Please come prepared to the first workshop by thinking about answers to the following questions. Please write these down and be prepared to share during the workshop.

* What objective are you trying to achieve in your communications strategy?
* Who is you target audience and what do they need to hear?
* What are your strengths, weaknesses, opportunities, and challenges?
* What tactics are in your toolbox (and one is, social media) and what are your timing/milestones?
* What do you know about how your target audience uses social media?
* Identify three areas that your NGO can improve its use of social media by the end of the five workshops.

**Reading**

Read Chapter 1, Introducing the Networked Nonprofit

***The Networked Nonprofit*,** by Beth Kanter and Allison Fine

The introduction explains what a networked nonprofit is and why it is important to be one. It also covers some of the fears and concerns that many nonprofits may have about using social media that keep them from leveraging the power of social media for social change. The chapter shares two case studies of small nonprofits that have used social media to power social change in this new connected world.

English: http://emediat.wikispaces.com/file/view/chapter\_1\_intro\_networkednonprofits.docx

Arabic: http://emediat.wikispaces.com/file/view/Arabic+Chapter+1.doc

French: http://emediat.wikispaces.com/file/view/French+Chapter+1-+Introducing+networked+nonprofits.doc

**Reflection**

Please think through the following questions and be prepared to share your thoughts with the group during the first workshop: Is your NGO a “Networked NGO”? Why or why not? What do you need to do to become a Networked NGO?

# Participant Agenda

Day 1: Introduction to Social Media for Civil Society & Networked NGOs

**Learning Objectives**

* To provide an overview of the networked NGO concept and how they use social media for civil society goals
* To have participants self-assess their current level of social media practice and understand the basic principles for success (*Crawl, Walk, Run, Fly*)
* To provide an overview of the program and for participants to get to know each other

**Schedule**

9:00 – 10:30 Program overview and Icebreaker

10:30 – 10:45 Break

10:45 – 12:00 Networked NGOs

12:00 – 1:00 Lunch

1:00 – 2:30 Interactive Assessment: *Crawl, Walk, Run, Fly*

2:30 – 2:45 Break

2:45 – 4:30 Principles of Social Media Practice for Networked NGOs

4:30 – 5:00 Reflection

Day 2: How Networked NGOs Create a Social Media Strategy Plan

**Learning Objectives**

* To understand and think through the basic steps of creating a social media strategy plan
* To connect social media tools to strategy (Blogs, YouTube, Facebook, Twitter, and Mobile)
* To understand what is needed for culture change, staffing, and measurement to support the implementation of the plan

**Schedule**

9:00 – 9:30 Introduction and Icebreaker

9:30 – 10:30 Effective Social Media Strategy – Part 1

10:30 – 10:45 Break

10:45 – 12:00 Effective Social Media Strategy – Part 2

12:00 – 1:00 Lunch

1:00 – 2:30 Social media game

2:30 – 2:45 Break

2:45 – 3:30 Social media strategy implementation

*Doing the Work: How much time does it take to do social media?  
Creating Your Rule Book: Social Media Policy, Getting leadership buy-in  
Measurement: Using data to drive results and decisions and learning from mistakes*

3:30 – 4:30 Quiet time to work on their social media strategy plans

4:30 – 5:00 Reflection

Day 3: Coaching in Small Groups and One-On-Ones for NGOs and CSOs;

Training on How to Use OLC

**Schedule**

9:00 – 10:30 Introduction to the Online Learning Community and how to use it

10:30 – 4:00 Coaching in small groups – group people together at similar levels

# Detailed Trainer’s Outline & Worksheets

Day 1: Introduction to Social Media for Civil Society & Networked NGOs

Learning Objectives

* To provide an overview of the networked NGO concept and how they use social media for civil society goals
* To have participants self-assess their current level of social media practice and understand the basic principles for success (*Crawl, Walk, Run, Fly*)
* To provide an overview of the program and for participants to get to know each other

9:00-10:30 Program Overview and Icebreaker

1. **Provide introduction and give an overview of the program**

Give a verbal overview of the program in as much detail as needed depending on how much they already know about the program and expectations, see http://www.emediat.org/main/program-overview/.

The program outcomes are:

* Increase CSO/NGO knowledge, access and skills to use new media effectively to advance their unique missions and strengthen their organizations
* Improve communication between CSO/NGO leaders and key stakeholders and between CSO/NGOs and their communities of peers around the world
* Improve communication between CSO/NGOs and governments in the MENA region

Emphasize that he five-workshop agenda is an intense schedule and a lot to cover and implement in a very short time frame. While you will be exposing participants to many new ideas, tools, and techniques, it is not an expectation that every organization will implement all tools presented in the workshops at the deepest level to reach the above outcomes.

1. **Review workshop agenda for day 1**
2. **From Me to We: Creating A Social Network Based On Our Individual Knowledge**We are going to be talking about Networked NGOs. Networked NGOs understand how to use social networks to reach their goals using social media. Social networks are collections of people and organizations who are connected to each other in different ways through common interests or affiliations. Social networks have different patterns and structures to them and the glue that holds networks together and makes them effective is relationships. If NGOs apply the basic building blocks of social networks, their social media plans will yield impactful results.

*Three Things About Me*: This icebreaker allows individuals to introduce themselves and share something about their experience, expertise, or knowledge related to the project. The exercise will help learn what knowledge we can share with others. We will have created a social network on the wall that allows us to visualize our shared points of connection and reciprocity. The trainers will document the activity to post to their blogs.

* Preparation Step: Tape poster sheets to the wall and label with “Five Things About Me Network.”
* Hand out the sticky notes to participants. Participants should include their name and one word per sticky note.
* Have each participant stand in front of the group and share their “Three Things About Me”, and put the sticky notes on the poster sheet.
* The trainer’s should go first in order to model being brief.

Debrief: As a group, reflect on these questions and summarize connections/ reciprocity poster paper: What points of connection or common interests did you hear or see? What opportunities for reciprocity? We have a created a social network and found connections based on our mutual interests. This is one of the key benefits of social media, especially for trainers. How might we leverage this network for the benefit of our learning social media skills?

1. **Human Spectrogram**

This is a group face to face exercise to help surface similarities and differences in a group, help people to get to know each other and to do something together that is active.

* In a large open space put a long piece of tape on the floor. It should be long enough for the full group to spread itself out over. Alternately, use a long piece of rope or ribbon.
* Ask everyone to stand up and gather around the tape. Explain that the tape is a continuum between two answers to questions they will be asked. Then kick off with a simple, fun question to demonstrate the method.
* Walk up and down the tape and take a sampling response from people as to why they positioned themselves on the tape the way they did. Usually it is good to sample from both ends and somewhere in the middle. If, upon hearing other people's responses, people want to move, encourage them to do so. This is about meaning making, not about an absolute measure of peoples' opinions.
* Move on to "serious" questions. As you ask questions, encourage people to notice where people are on the line –this helps people find people in common or who have different views that could be useful discussion starters.
* Depending on time, use between 3 - 7 questions. You can tell it is time to quit when people stop moving and are talking to each other more than participating. This means either they are bored, or they have become deeply engaged with each other. The latter is a good thing!

Suggested Questions:

* How comfortable are you personally social media? Very / Not at all
* Online social networks and social media can help us achieve results that support civil society goals
* The networked NGO concept is relevant to our NGO’s work

*Additional questions may be added. Identify questions that you think the group will have a difference of opinion about or that can unpack potential resistance from participants.*

**10:30-10:45 Break**

**10:45-12:00 Networked NGOs**

Presentation: Overview of social media for civil society and networked NGOs: This presentation will introduce the networked nonprofit concept at a very high level. The presentation deck includes a lot more examples than you will need. Feel free to delete, add, and edit. The case study is described in the notes section. In-country teams should incorporate localized examples.

This has been modified from: http://emediat.wikispaces.com/Day+2

Source for more stories: http://www.bethkanter.org/emediat-day2/

**12:00-1:00 Lunch**

**1:00-2:30 Interactive Assessment**

1. **Presentation of Framework: *Crawl, Walk, Run, Fly***

* Present the definition of each level of social media use
* Use the “What Does Flying Look Like?” as a handout

1. **Group Exercises**

*Full & Small Group Exercises, use if you have mixed levels*

Ask people to stand if they think they are crawlers, then have them answer the questions below. Next ask the walkers to stand and ask them the questions. Ask the runners to stand and ask them the questions. Finally, ask the flyers to stand and ask them the questions.

* If you are crawling, what does it look like? What do you need to get to the next level?
* If you are walking, what does it look like? What do you need to get to the next level?
* If you are running, what does it look like? What do you need to get to the next level?
* If you are flying, what does it look like? How can you keep flying?

Then, ask people to self-identify what category they are in and work together as group answering those questions for fifteen minutes. Have each group report to the full group what they discussed.

*Please note, If you have participants that all have NO experience at all using social media, they would work on the pre-assignment that helps think through the basic questions that need to be answered for a strategic communications plan.*

1. **Living Case Studies** (optional)

Let participants know that you have reviewed all their websites, applications, and social media use and that you’re going to share some slides about specific NGOs in the room. Invite those NGOs to come up and share their knowledge with the group. If they don’t feel comfortable, they can say no.

**2:30-2:45 Break**

**2:45-4:30 Principles of Social Media Practice for Networked NGOs**

When participants come back from coffee break, do an energizer that uses movement, one option is to use the “Chicken Dance” (http://www.youtube.com/watch?v=6UV3kRV46Zs) and give prizes for the most creative dancing!

1. **An Introduction to Social Media Tactics and Tools**

Framing: To avoid getting a lot of how-to technical questions, tell participants that this is a high level overview of these tools in the context of the step-by-step way to think about social media strategy. The next four workshops will focus on how to use the tools and less on strategy, so what we are sharing now is just an introduction and a few examples. We do not want to get bogged down with a lot of how-to questions.

Tell participants that you know these next slides are bound to bring up lots of questions. Hand out sticky notes or 3x5 index cards and ask them to jot down their questions. Tell them that you will use these to make sure the questions are covered in the next four workshops. Alternatively, you use a poster sheet as a “Parking Lot” – and say you will take the questions into consideration to make sure they are addressed in the right workshop. *Please share these with Beth and IIE– so we can be sure that questions are addressed in next workshops*

This presentation introduces the different tools that will be taught in the next four workshops using a social media strategy framework that can be implemented in an incremental way. There are many tools that NGOs could use, but to be successful you have to be selective!

One common theme is that tools come and go, but the strategy is really important. The framework is:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Listen** | **Share** | **Participate** | **Publish** | **Network Building** |
| No Engagement | Broadcast/Promote | Low Engagement | Content | High Engagement |
| Google Alerts Social Mention Twitter | Twitter Share This! | Twitter Facebook | Blogger Flickr YouTube Flip Camera  Mobile | Facebook Twitter |

I’ve included a lot of examples in each category. You may not need all of these examples and you can modify and add examples to pertain to the local context. In the notes section of the PowerPoint, you will find a link to a blog post and notes to help explain the slide. If you feel the energy dropping, there are several ideas for engaging the full group in discussion or share pairs as well.

1. **A Brief Primer On Network Building Techniques**

**Network Primer Presentation:** Networks are more than random gatherings of people and organizations online. Social networks have specific structures and patterns to them. In order to engage them well, NGOs need to understand the fundamental building blocks of social networks. Shifting focus from organizational issues to engaging with social networks that exist is the first step. The networks are filled with people who want to help with a cause. NGOs that build social capital and weave their networks can achieve more impactful results.

What are the benefits for social media trainers? (efficiency and sustainability?)

Basic Building Blocks of Networks

*Nodes:* People or organizations  
*Ties:* The connections between them – relationship   
*Hubs:* People or organizations that have lots of connections, also called

“Influencers”  
*Core:* Inner cluster of people who do most of the work on any project or effort  
*Cluster:*  People or organizations that connected to one another, but w/few

connections to rest of network  
*Periphery or Edge:* Vital to growth because these people or organizations are likely to be

part of other networks

**Mapping Networks:** Social network mapping tools help you visualize your network. Use to draw your network because it helps you see the connections and identify strategy. There is a range from simple to complex, free to expensive, and low-tech to high-tech.

Example: National Wildlife Federation:

How Networked Nonprofits Visualize Their Networks: Advocacy Strategy  
http://www.bethkanter.org/network-mapping/

Example: Ecosystem Maps: Low Tech Approach   
http://www.flickr.com/photos/cambodia4kidsorg/4002466674/

Example: Visualize Professional Networks: LinkedIn  
http://www.flickr.com/photos/cambodia4kidsorg/sets/72157625781690621/  
http://blog.linkedin.com/2011/01/24/linkedin-inmaps/

Example: Map your Twitter professional network by keywords  
http://apps.asterisq.com/mentionmap/#user-kanter

**Social Capital:** Social capital makes relationships meaningful and resilient. Trust and reciprocity are key. Social media can help build social capital because:

* Social networks make it easy to find people online
* Serendipity is enhanced by social networking sites where people connect based on their interests or friends
* Reciprocity is easy

**Network Weaving:** This is a term coined by Valdis Krebs and June Holley. Network weaving describes a set of skills that help strengthen and build social networks. Some activities include:

* Introducing/connecting people to one another:

http://www.flickr.com/photos/cambodia4kidsorg/4916710523/

* Facilitating conversations, building relationships with network members:  
  http://www.flickr.com/photos/cambodia4kidsorg/3945462752/
* Sharing resources, links, information, contacts:  
  http://www.flickr.com/photos/cambodia4kidsorg/4916710523/

http://www.flickr.com/photos/cambodia4kidsorg/4315202508/

You can also leverage the power of networks and social media for professional learning. As a trainer and capacity builder, you don’t need to know all the answers. You can connect with peers and even people you don’t know personally who have subject matter expertise.

1. **Mapping Exercise (optional, if time permits and is appropriate for the group of participants)**

Goal: This exercise will provide an opportunity for participants to map their network to visualize, develop, and weave relationships with others to help support their program or communications goals.

Description: We will debrief standing up as group and looking at each team’s map. One person from each team should be prepared to explain the map to the whole group and share insights.

Steps:

* Put the NGOs into small groups with similar programs or areas.
* Use sticky notes and paper taped to the wall or markers and paper – they can map their network in the local area, their topic area, or map their personal network. Whatever works best.
* Each person on the team is part of the “core” and will be working together in a “networked way” to reach organizations or people that are connected to their program area.
* Have each person add the “go to” people, organizations, and others in the topic area.
* Have each person identify influencers that they may know or not know to help them reach their objective.
* Identify and discuss specific ties between the core and the nodes – identify overlaps.
* Using the reflection questions below, look for different patterns or clusters – do you know the same or different people?
* Who do you need to build relationships with? Who can you introduce in your network?
* Ask reflection questions to generate insights. You’ll need to revise this so they specifically support your objective.
  + What people, resources, and organizations are in your ecosystem?  
    What are the different roles?
  + Are you connected or not connected?
  + If connected, how are you connected?
  + Think about the touch points in your network? How do you appreciate, thank, and celebrate important people in your network?
  + Think about reciprocity: What have you given people in your network before they have asked?
* Debrief: Gather everyone together as a full group standing. Walk as a group to the first map, and ask:
  + How does this idea translate?
  + How can you use your networks to support each other’s social media strategy plans?

**4:30-5:00 Reflection Exercise**

Ask participants to do a series of share pairs asking these questions. Use a bell or “raise your hand” and be quiet technique. Allow participants to do 3 or 4 rotations before bringing everyone in a circle to share the takeaways for the day.

* What did they learn today?
* What is still unclear?
* What do they need to think about to complete the homework assignment?
* What is one thing they learned that they put into action?

## Day 2: How Networked NGOs Create A Social Media Strategy Plan

**Learning Objectives**

* To understand and think through the basic steps of creating a social media strategy plan
* To connect social media tools to strategy (Blogs, YouTube, Facebook, Twitter, and Mobile)
* To understand what is needed for culture change, staffing, and measurement to support the implementation of the plan

**9:00-9:30 Introduction and Icebreaker**

This icebreaker will be to discuss thoughts from the first day of the workshop. As participants come into the room, have them write any burning questions or insights from the day 1 on sticky notes.

1. Put two posters on the wall, one labeled “Burning Questions” and the other labeled “Insights from Yesterday”
2. Give participants sticky notes as they walk in and ask them to jot the down their questions and insights and place on the wall when done.
3. As people post their questions and insights, cluster them into different groups based on the patterns you’re seeing.
4. Identify questions that are off topic to the workshop and point those out.
5. Start a discussion asking participants to share their insights: What was their a*h ha moment* from yesterday?

**9:30-10:30 Effective Social Media Strategy – Part 1**

This presentation will walk participants through the social media strategy template. Have a hard copy available for participants to take notes on. Explain their deliverable for the program is to have a strategy plan written. It may take longer to complete than the workshop 1. As they learn skills for different tools, they will be updating their plans. The workshop today will explain a lot of the sections in detail and they will be given time to work on their plan today and tomorrow. Also, participants will have time over the next six months to revise and enhance their plans. Depending on the audience, you may need to simplify the template. Please note a detailed version below:

(30 minutes)

* **SMART objective:** Use the slides in the deck to explain what a SMART objective is and a social media example. Have them brainstorm a SMART objective for the example in the PowerPoint deck and share their answers.
* **Each One Teach One:** Participants will work in pairs to brainstorm social media SMART objectives using the worksheet.
* **Report Out:** Ask for volunteers to share their SMART objectives.

(30 minutes)

* **Audience:** Use the slides in the deck to explain why it is essential to identify the audience. Examples are included; however feel free to replace these with other examples that you find which may better resonate with the audience.
* **Each One Teach One:** Participants will work in different pairs to brainstorm audience using the worksheet. You may also want to have hard copies of the *Arab Social Media study* for people to read. It is included in the materials.
* **Report Out:** Ask for volunteers to share their audience definitions.

**Break**

Note: You may choose to have participants take the break before the report and begin the next section with a report out on audience.

**10:45-12:00 Effective Social Media Strategy – Part 2**

This section will give participant time to work on the three steps:

(30 minutes)

* **Integration:** Use slides to explain the concepts. Replace with localized examples.
* **Each One Teach One:** Participants work in pairs using the integration worksheet.
* **Report Out:** Ask for volunteers to share with whole group.

(25 minutes)

* **Listening & Content Scan:** Use slides to explain the concepts. Replace with localized examples.
* **Each One Teach One:** Participants work in pairs using the integration worksheet.
* **Report Out:** Ask for volunteers to share with whole group.

(20 minutes)

* **Engagement:** Use slides to explain the concepts. Replace with other examples.
* **Each One Teach One:** Participants work in pairs using the integration worksheet.
* **Report Out:** Ask for volunteers to share with whole group.

**12:00-1:00 Lunch**

**1:00-2:30 Social Media Game**

The introduction to social media tools will be taught in the workshops and are on the game cards. To play the game, please use materials which can be found below:

http://emediat.wikispaces.com/file/view/Social-Media-Cards-Basic1-no-text.jpg

http://emediat.wikispaces.com/file/view/Social-Media-Cards-Basic2-no-text.jpg

Add the Arabic Words for the tools and add points. You may give prizes for the best strategy and have someone serve as the judge. You’ll need to explain https or not use the card.

**Instructions:** Ask for 3 - 5 volunteers who want assistance from their peers. They will use their answers to the morning questions for the basis of picking tools. Assign the rest of participants to work with one of the volunteers. Add points to the cards and give a limited amount for their budget. Do a contest and have them report out. Finally, award the prizes.

**Resource:** This game was created in 2007 by Beth Kanter. Here’s a wiki with different variations since then: http://social-media-game.wikispaces.com/October+2009

**2:30-2:45 Break**

**2:45-4:30 Social Media Strategy Implementation**

The content in the slides covers the points below and the rest of the template.

Doing the Work: How much time does it take to do social media?  
http://www.bethkanter.org/category/capacity/

Creating Your Rule Book: Social Media Policy, Getting Leadership Buy-In  
http://www.bethkanter.org/trust-control/  
http://www.bethkanter.org/wallow-in-fear/

Measurement: Using data to drive results and decisions and learning from mistakes  
http://www.bethkanter.org/get-your-social-media-strategy-in-shape-with-spreadsheet-aerobics/

Do share pairs or let people ask you questions as you present.

**3:30-4:30 Quiet time to work on their social media strategy plans**

This is free time for people to reflect on what they’ve learned and start drafting their social media templates. They will not be able to complete it in an hour. If a large NGO is participating, they may need to discuss issues with others in the organization.

**4:30-5:00 Reflection Exercise**

Questions

* What did participants learn today?
* What is still unclear?
* What do they need to think about to complete the homework assignment?
* What is one thing they learned that they put into action?

## Day 3: Coaching in Small Groups and One-On-Ones for NGOs and CSOs;

## Training on How to Use OLC

**9:00-10:30 Introduction to the OLC and How To Use It**

Information will be provided by Meedan in a separate training for program staff (scheduled for 5/2011).

**10:30-4:00 Coaching and Clinics**

This time will be spent coaching participants in small groups. People should be grouped together at similar levels to work on their strategy plans.

Also allow for time to work on setting up blog, or Twitter as a learning journal.

Assignment: Use the blog or Twitter to share NGO strategies as they work on it during the next month - or - they can take this time to ask questions from the rest of the group.

# Workshop Post-Training

* Evaluation survey of participants: How is this typically done?
* Here is an example of one of evaluations customized for E-Mediat:

https://spreadsheets.google.com/viewform?formkey=dGhyUUlJRHFFb3pzb24tZDZyUERnWEE6MA#gid=0

Beth and IIE would like to have a written report, photos, and reflections from the trainer’s about what worked, what didn’t and how they would change the curriculum and/or guide.

Here are some questions to include in your reflection:

1. How did you modify the curriculum? What did you change, delete, or keep?
2. If you created different small group exercises or handouts, please describe and share.
3. What worked best about the content in the curriculum for your participants? Why?
4. What did not work so well?
5. As a trainer delivering the training, what were you most confident about? What were you least confident about?
6. What additional information, content, tips, suggestions, or resources would be useful in the next trainer’s guide? Was the level of detail too much, too little, or just right?
7. Based on your experience delivering the workshop, what suggestions do you have for the content for the remaining workshops?





Appendix

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## Social Media Strategy Plan Template

1. Objectives

Describe your organization’s objectives for your social media plan using SMART (Specific, Measurable, Attainable, Relevant, and Timely) strategy.

|  |  |
| --- | --- |
| **Objective 1:** |  |
| **Objective 2:** |  |
| **Objective 3:** |  |

Describe how these objectives support your organization’s mission:

Describe what you learned from benchmarking similar organizations and their social media objectives. How are these goals are a logical evolution of your communications/marketing strategy?

2. Audience

Identify the audience segments you hope to reach below:

|  |  |  |
| --- | --- | --- |
| **Segment** | **Description** | **Objective** |
| Target Audience 1: |  |  |
| Target Audience 2: |  |  |
| Target Audience 3: |  |  |

3. Internal

Describe how the social media plan will be reviewed and received by senior management and board members. What questions do you anticipate?

Describe or attach your social media policy – and process for ensuring it is an active, living policy.

4. Content Integration

Where does a social strategy make the most sense? Where can it enhance existing marketing, program, or communications strategy?

|  |  |
| --- | --- |
| **Channel** | **Social Integration** |
| Website |  |
| Live Events |  |
| Email |  |
| Print |  |
| Mainstream Media (MSM) |  |

Identify content assets that can be repurposed, remixed, or recycled for your social media strategy.

5. Listening and Audience Research

Summarize what you learned about your audience from the social media audit, secondary or primary research, and listening techniques. Why are you focusing on these audience groups? What is your plan for ongoing monitoring and scanning during implementation?

6. Social Strategy

Please describe your social strategy:

* Engagement
* Promoting
* Social Content
* Network Building

7. Tool Selection and Techniques

Describe the specific tools you’ll be using to implement your social media strategy. Why did you select to use these tools?

|  |  |
| --- | --- |
| **Tool** | **Use** |
| Facebook |  |
| Twitter |  |
| Blog |  |
| YouTube |  |
| Add More |  |

8. Measurement

Describe your metrics for success. What specific data points will you collect and how will you collect and analyze this information? How will you use it to document return on investment?

9. Staff and Training

Who will be responsible for implementation? How many hours per week? What specific job description and responsibilities? What training will you provide?

10. Evaluation and Piloting

Please describe how you will monitor and evaluate your social media plan. How will you use data to improve your practice? What small piece of this plan will you pilot? Identify your pilot target audience. How will you collect and implement feedback?

11. Timeline

Please include a timeline for major tasks.

12. Budget

Please provided a detailed a budget of how you will use funding to implement your plan.



## SMART Social Media Strategy Objectives

**Principle:** Social media strategy connects, supports, and enhances an overall internet communications strategy and connects to offline behavior change or action.

1. What is the big goal your organization has for civil society?

2. Describe your organization’s program or communications objectives that support the above goal?

3. Make it **SMART:**

|  |  |  |
| --- | --- | --- |
|  | **Definition** | **Describe** |
| **S** | Specific |  |
| **M** | Measurable |  |
| **A** | Attainable |  |
| **R** | Relevant |  |
| **T** | Time-bound |  |

4. What is the behavior change or action you want your social media strategy to help drive or influence?

5. What questions do you have?

## Listening Worksheet



**Principle:** Use actionable listening to understand your target audience – includes listening on social media channels and other research.

1. What is the broad communications objective you want to support with a listening post?

2. What are similar NGOs doing on social media channels? What conversations are they having? Who is listening to them?

3. What keywords or phrases will you use to create your listening post. Here are some starters:

* Nonprofit Name or Issue
* Other nonprofit names in your space
* Program, services, and event names
* CEO or well-known personalities associated with your organization
* Other nonprofits with similar program names
* Your brand or tagline
* URLs for your blog, web site, online community
* Industry terms or other phrases

## Integration Worksheet

**Principle:** Identify where integrating social media makes most sense:

1. Where does a social media strategy make the most sense? Where can it enhance existing marketing, program, or communications strategy?

1. What are some of examples of upcoming events, programs, content, or other opportunities?
2. Please describe social media channels and social integration opportunities below:

|  |  |  |
| --- | --- | --- |
| **Channel** | **Describe** | **Describe social integration opportunity** |
| Web Site |  |  |
| Live Events |  |  |
| Email |  |  |
| Print |  |  |
| Mainstream Media  (MSM) |  |  |

1. Identify existing content assets that can be re-used for your social media strategy.

## Audience Worksheet

**Principle:** Identify the audience segments you hope to reach for your social media objective. Complete the table below:

|  |  |  |
| --- | --- | --- |
| **Segment** | **Description** | **Objective** |
| Target Audience 1: |  |  |
| Target Audience 2: |  |  |

1. Who do you want to reach?

2. What do you know about them?

3. What messages or information will influence them?

4. What are they saying about your issue or organization on social media?

5. What social media tools do they use?