American Red Cross

Social Engagement Handbook

Version 2.0

Written by:
The Social Engagement Team – National Headquarters

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Who: This guide is for all field units associated with the American Red Cross, such as chapters, blood regions, and SAF stations.

What: This guide contains tips and best practices for becoming a socially engaged field unit for the American Red Cross. It is the 2012 supplement to the original Social Media Handbook.

When: Start now, but we don't expect you to do everything in this guide right away. Social engagement is a long-term commitment. This is a roadmap for building a sustainable social engagement strategy.

Where: Social networking platforms.

Why: The Red Cross is integrating social engagement into our operational DNA to maintain and innovate our relevance as an organization. We want to empower individual Red Crossers, volunteers, and field units to participate in and be informed by social communities.

The Social Engagement team in the NHQ Communications department creates the national social strategy, and encourages all Red Crossers to participate in the social web.

The benefits to your field unit of being engaged through the social web – such as Facebook, Twitter, YouTube – include:

- Meet, serve, and steward your community where they spend time
- Build an everyday relationship with your local stakeholders
- Increase relevance in your community
- Increase value to local stakeholders

- Build fabric of support in your community
- Help the Red Cross keep the human in humanitarian
- Increase revenue, course takers, and community participation

How: We are introducing two roles at the Red Cross:

Social Engagement Advocates: Any staff member or volunteer who has taken the social engagement certification course (Social Basics). Advocates are encouraged to use their personal social accounts to engage with others on behalf of the Red Cross.

Social Engagement Specialist: Any staff member who is (1) responsible for community management and generating content for a local field unit and/or (2) trained to engage with the public via the Radian6 Engagement Console and/or (3) acts as a disaster digital volunteer.

In 2012, we will begin to offer a social engagement certification course. This course will be available to any Red Cross employee or volunteer, so that they can personally participate in the social web on behalf of the Red Cross. We also encourage each field unit to identify an Engagement Specialist who will have additional training as someone who engages with the public using an official branded voice.

Please contact Kristiana Almeida, Enterprise Community Specialist, with any additional questions, suggestions, ideas, and concerns. Kristiana.Almeida@redcross.org.

What does a socially engaged field unit do?

Once your field unit commits to sustaining a social engagement strategy for everyday operations, it can then start to check off each of the below items:

Building Capacity to engage

___ My field unit has adopted a culture of listening, adapting, and inspiring

___ We have at least one person spending 1 hr/day on social engagement

___ We are committed to listening to social conversations

___ We respond to stakeholders who mention us

Activating a Social Engagement Strategy

___ We proactively foster community on our social platforms

___ We invite and welcome new people to join our community

___ We create original content for our social platforms

___ We are prepared to continue operations during a major disaster

___ We are generous to our community members on our platforms

___ We are a valuable resource to our community

___ We are networked with other Red Crossers around the country

___ We proactively offer opportunities for our online community to meet offline

Inspiring Donations via Social Engagement

___ We offer our community tools to fundraise on our behalf

Measuring the Impact of Social Engagement

___ We share community input with operational decision-makers

___ We inspire offline action (donations, course takers, preparedness)

Build Capacity to Engage on the Social Web

As a social Red Cross field unit, your focus is on empowering your community to get help and give help. Your social supporters will be invited to help your field unit execute the mission of the Red Cross. Keep your focus on providing value and creating a safe, fun space for local residents, groups, companies, and fellow nonprofit organizations to collaborate on the Red Cross mission.

Resource: The real way to build a social network

Identifying an Engagement Specialist

At least one person (Engagement Specialist) in your field unit should be responsible for your unit's – whether a chapter, SAF station or blood region - social engagement activities. This person can be a volunteer or a staff member for whom social engagement is a priority. Here's a checklist for identifying the right Red Crosser(s) for this position:

___ Can devote at least 1 hour/day to social engagement
___ Has completed the American Red Cross social engagement certification course
___ Is familiar with the projects, products, campaigns, operations of your field unit
___ Is willing to use his/her personal social presence to engage stakeholders
___ Has passion for the social web
___ Has passion for the Red Cross
___ Has technical knowledge about how social tools work, or is willing to be trained
___ Is willing to be an internal ambassador for social engagement
___ Mentors staff and volunteers to become social engagement advocates
___ Is willing to be an external networker for Red Cross stakeholders

Resource: 12 steps to hiring a social engagement manager

Recommendations for Managing Official Red Cross Social Accounts

___ Make sure at least two staff members or long term volunteers have administration rights to the official social accounts. Remember, a staff member or long term volunteer should be responsible for the social engagement strategy. This

person may delegate the day-to-day tactics to an intern or volunteer, but there should be a longer term commitment and continuity plan for rotating interns, volunteers, and even staff members.

___ Store the social platform logins and passwords where they can be accessed by appropriate people if needed.

___ Reach out to Kristiana Almeida at NHQ for support and advice at any time. Kristiana.Almeida@redcross.org.

Listening

Listening is the foundation of your social engagement program. The tips will help you build a day-to-day listening strategy.

Social engagement means participating in conversations that happen on public social networking platforms such as Facebook and Twitter. Find people who have shared interest in the Red Cross mission by practicing the art of listening.

Creating a culture of listening

All staff and volunteers are encouraged to "listen" and engage on the social web. At least one staff member or volunteer (Engagement Specialist) should be *responsible* for listening a minimum of 1 hour/day.

When the Engagement Specialist posts official content, staff and volunteers are encouraged to comment, share the post, and engage with others who comment. Staff and volunteers are encouraged to participate in the conversation and may provide insights and alerts to the Engagement Specialist about potential engagement opportunities or to misinformation and misconduct.

Tools

We encourage you to test various listening tools to determine which one works best for you and your unit. Below are a few examples:

	Desktop Software	Mobile Apps	Web based
Twitter	TweetDeck	Twitter (official app), Hootsuite, TweetDeck	Twitter.com, Hootsuite, Cotweet
Facebook	TweetDeck	Facebook (official app), Hootsuite,	Facebook.com, Hootsuite,
Blogs	Microsoft Outlook, FeedDemon	Feeddler, Kindle, Google Reader	Google Reader

How to listen/what to listen for

Using these tools, you can follow specific topics or trends.

For example: If there is a tornado warning in your area of Chicago, create a search for "tornado" and "Chicago" in order to provide information, answer questions, and provide comfort as needed.

Resource: How to find the most relevant hashtags on Twitter
Resource: Step-by-Step Approach to listening by Beth Kanter

Another best practice is to set up a search for your unit's name and Twitter handle so you will see what people are saying directly to or about your unit or the Red Cross.

___ Go to http://www.twitter.com
___ Sign into your twitter account
___ In the search box, enter your desired keyword
___ Click this icon and choose "Save Search"

___ Check this search each day

The Engagement Specialist should also check your unit's Facebook page periodically throughout the day to engage with those speaking directly to you.

All staff and volunteers in your field unit are encouraged to participate in all discussions in their subject matter areas.

The social engagement team in the Communications Department reads and responds to the more than 4,000 daily social mentions of the Red Cross. We then curate this information into the Social Media Update to show the day's conversation trends. If you wish to receive the Social Media Update via email, email socialmedia@redcross.org and request to be added to the distribution list.

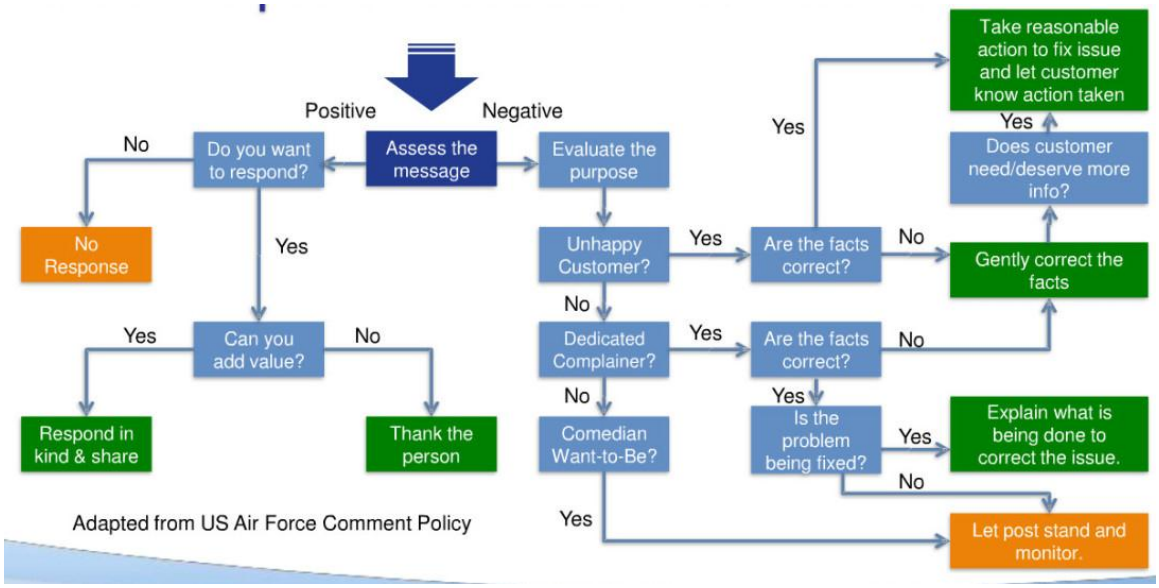
Responding

Addressing questions, acknowledging comments, and contributing to conversations is the next step to engaging your community. The goal should be to respond to every post directed to your field unit on social platforms. For example, whenever someone posts to your Facebook page, you should engage with that person on Facebook, even if it's a simple thank you.

Some people will have social conversations *about* your field unit or area of expertise that don't directly address your unit. You don't have to respond to every conversation that mentions you, but do look for opportunities to educate, provide value, connect community members together, share, and inspire. Challenging comments are often opportunities to increase understanding of the Red Cross.

Talking with your supporters is a good thing. Your conversations should not be talking points – converse with people on social platforms as if they're your neighbors. They are. If you have any concerns or don't know how to handle a particular comment, contact Kristiana Almeida at kristiana.almeida@redcross.org.

The below flow chart will be helpful when determining when to engage in a conversation about your unit.



If at all possible, respond to a stakeholder's question publicly and using the same tool s/he used to contact you initially as your response mechanism. Avoid moving the discussion to email whenever you can.

Social Engagement Strategy

Finding your community

The individuals who join your chapter, blood region, or SAF station's social communities will have different levels of interest for the Red Cross that span the ladder of engagement.

Our recommendation is to focus on the quality of your community rather than the quantity of followers. While it may be nice to have 10,000 "happy bystanders" involved, the better goal is to provide value, stewardship, and a sense of belonging to inspire community members to become more involved in the Red Cross mission.

Inviting New Stakeholders to join your community

___ Add your Twitter handle and Facebook link to your unit's press releases.
___ Ask your media contacts to follow your unit's social accounts for fast information
___ Invite stakeholders at in-person events to join your social communities
___ Invite people to join your social community during media interviews
___ Include a case study about your social engagement in a web or newsletter story
___ Include links to your social presence on your field unit's homepage
___ Include links to your social presence in email signatures

Note: Please do not beg for additional followers and likes on your social accounts. For example, never post, "Like our page!" to Facebook or "Help us get to 1,000 followers!" on Twitter. Instead, show the potential stakeholder what they'll get out of being part of your community. If you post useful, shareable information and prove that you're listening and engaging, people will want to "like" your page or follow you.

Choosing a Platform

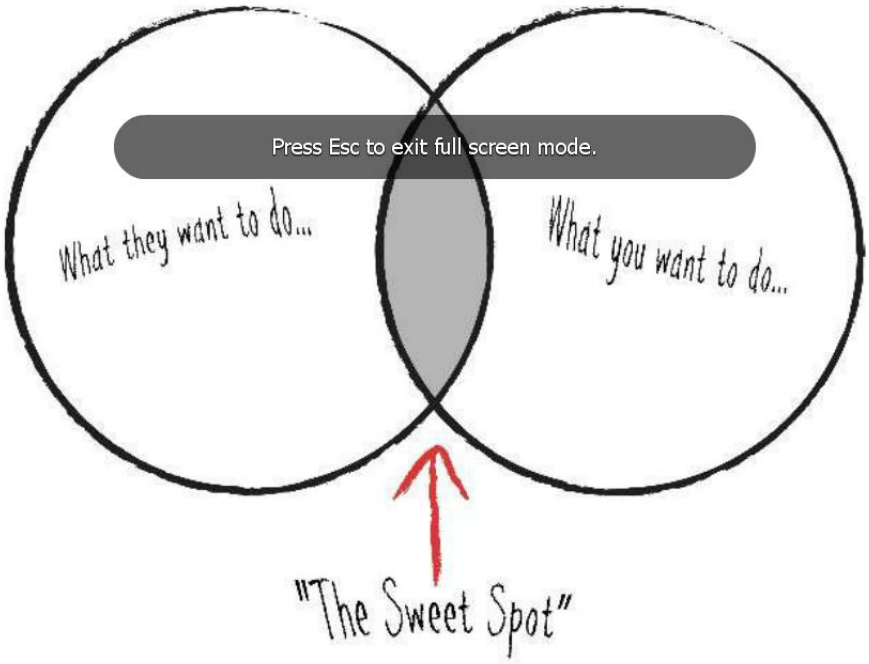
You and your Red Cross unit don't need to create a presence on every single platform. Through your listening and engaging process, figure out how much capacity (time) you have and concentrate on the platform(s) where your community spends the most time.

At this time, local field units are permitted to host one Facebook page, one Twitter account, one Flickr account, one YouTube account, and one blog. Blood regions are not permitted to create local Facebook pages. This means that you cannot create accounts for each line of service. We ask that no local field unit create Google+, Pinterest, or Instagram accounts. If you would like to contribute to the national G+, Pinterest, or Instagram platforms, please contact socialmedia@redcross.org.

Creating Content

The key to empowering your community to participate and enthusiastically share your content is to *include them*. Your goal is to find the sweet spot between what your community finds valuable and what your field unit wants them to know or do. Before posting content always ask: "What is in it for the community?" and "What about this post will people find interesting, accessible and useful enough that they'd want to share it?"

Where's the sweet spot?



Ideas for generating content:

1. Are you launching a campaign your community can get involved in? (March is Red Cross Month, National Preparedness Month, Holiday Campaign, etc.)?
2. Have your donors and/or volunteers made inspiring mission-related impacts you can share?
3. Is your field unit responding to local disasters or deploying volunteers to a national disaster?
4. What community activities or events (festivals, drills, parades, etc) is your field unit involved in?
5. Are there interesting stories in the news that have a connection to the Red Cross mission?
6. Do you have an upcoming event the public can join? When is the next CPR/First Aid course? Do you have a fundraising event? Heroes Breakfast? Invite your social community to spread the word, get involved, and attend.
7. Can you create or employ an internet meme or popular internet item to inspire action for the Red Cross?

8. Do you have a unique or inspiring photo or video to share?
9. Are you looking for feedback, advice or help? Ask your community to help
10. Ask questions, provide value, be generous, be shareable.
11. Tell the Communications Department at national headquarters when you've come up with something you're proud of, including during disasters. Email media3@redcross.org

Resource: Engaging Social Engagement Content

Remember, the more creative and engaging posts are, the more likely you will have people responding to, sharing, and acting on them. Be human. Include pictures/video whenever possible – you have a greater chance of getting interaction and inspiring action. Have fun, experiment, adapt, and include your community as much as possible.

Social Media in a disaster

During high-visibility disasters, the Red Cross should prevent and alleviate human suffering in the face of emergencies by mobilizing the power of volunteers and the generosity of donors on the social web. Best practices and lessons learned on how to effectively continue social engagement during major disaster operations can be found in the social engagement guidelines for disaster along with the social worksheet for disasters to help you put a plan in place.

Be Generous to your community

Generosity is a valuable commodity on the social web. Pay attention to your stakeholders and make them feel great about being part of the community.

___ Participate in #FollowFriday (or #FF) on Twitter. Pick out 3-5 followers who are interesting or have tweeted with you in the past week, and acknowledge/thank them

___ Publicly thank people for participating in a conversation

___ Contribute to conversations. Ask questions and participate in others' discussions when relevant

___ Re-post inspiring content from your community to your field unit's social platforms

Be Valuable to your community

The Red Cross is a trusted source of many kinds of information, and a trusted source of hope during difficult times. Providing this information and comfort in the moments when people are looking for it online will help ensure relevance.

___ Be quick and accurate
___ Acknowledge a crisis as soon as possible, but only share confirmed information
___ Be relevant. Stay attuned to the news and culture to provide real time value
___ Provide preparedness tips whenever they apply to a situation in your area
___ When there is not a crisis, prepare your community with tips and stories
___ Host a Twitter chat about specific issues the Red Cross cares about
___ Participate in Twitter chats hosted by others on issues connected to Red Cross
___ Like and comment on your local stakeholders' Facebook pages
___ Comment on relevant blog posts and online media stories

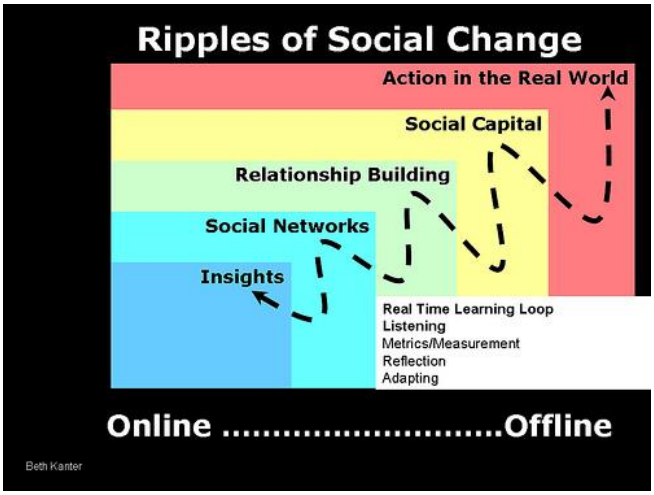
Network with Red Crossers

National headquarters has created a few ways for you to engage with fellow social engagement specialists across the country.

1) Go to the Red Cross' Twitter stream and look for the "People" and "Local" lists to look for Red Cross chapters and volunteers/staff who are online. Feel free to follow a few; but remember, keep your own following list balanced…meaning don't ONLY follow people from the Red Cross!
2) There is now a "Red Cross Social Heroes" group on Facebook that you can join if you're looking for social engagement-specific resources. You can also use the group to ask questions and share your social successes.

Get your Social Community to Meet in Real Life

Here are a few ideas to get your community to grab their smart phones and join you in real life.



Tweetups

Host a tweetup to bridge the gap between online and offline relationship building. Invite socially savvy stakeholders to your chapter or other local space (such as a restaurant for happy hour) to get to know them, encourage them to get to know one another, and share the Red Cross mission.

___ Bleedups: The Central Plains Blood Region has successfully tried several tweetups for blood donors

___ CPR Tweetups: The Canadian Red Cross does regular CPR tweetups where they invite their Twitter followers to participate in a CPR/First Aid course and tweet through the class. This enables your passionate followers to talk openly about an important course

___ Red Cross Tweetup: Make your next fundraising event a tweetup

Inspiring Donations Via Social Engagement

The Red Cross inspires action with its presence on the social web. While we know it's tempting to treat these tools as mass-marketing outgoing channels, research suggests that frequently requesting donations causes diminishing returns on engagement. Below is guidance to help your field unit choose the most effective fundraising approaches. Our goal is to respect our communities and to embrace the idea of *engagement* rather than *promotion*. There is no such thing as an audience on the social web – everyone is a part of the community.

1) Add the Donate Tab on your Facebook page (note: blood regions are not permitted to have Facebook pages)

___ An Administrator of your Facebook page logs into Facebook

___ Go to the Donate app page

___ Click "Add to my page" and choose your page from the drop down menu

___ Invite your local stakeholders with Facebook *pages* to add the Donate Tab

2) Partnering with a Corporation

If a corporation asks you to participate in a joint social engagement project, please contact the social engagement team at National Headquarters. We will work with the development team to help you evaluate whether the project is a strategic priority for the Red Cross and of interest to our community by using the following criteria:

- Consider the Company
  - Are its values consistent with those of the American Red Cross?
  - Does the company have an existing relationship or connection with the American Red Cross?
  - Is the corporation active on social networks?
  - Does the company understand our social media philosophy?

        - Does the project offer an expansion or solution to helping our stakeholders engage with the American Red Cross?
        - What is the fee structure the company is proposing?
    - What are the benefits to participating in this project?
        - Will it empower our existing stakeholders to act or impact more easily than they can today?
        - Will the project allow the organization to empower new stakeholders?
        - Will the project create enough revenue to balance the potential capital lost in asking the community to participate?
        - Is the project easy to understand with straightforward action items?
        - Is the project easy to share?
        - Will this project enable the public to transform their online enthusiasm to real world action?
    - What are the challenges to participating in this project?
        - Is there a danger this project will cause donor fatigue?
        - Do we have the human capital to properly participate?
        - Is this partnership attractive to our target audiences?
        - Does this project complement our existing donor engagement and social media philosophies?
        - Will this project complement our existing communications, marketing and fundraising activities?
        - Does the project have potential to abuse our community's trust or frustrate them?
- We then make judgments based on our previous experience and knowledge of our audiences. If the partnership is worth pursuing for the American Red Cross, we will help you develop a strategy for executing.

3) Providing fundraising tools to your community

Rather than frequently asking for donations, give your community the chance to fundraise on behalf of the Red Cross themselves. We've developed a number of

tools you can offer to your community; our most popular option is our Online Heroes fundraising program.

4) New ideas
If you have a brilliant new idea for social fundraising, please contact socialmedia@redcross.org.

5) Sharing your fundraising success
In many cases, sharing your chapter's exact fundraising goal and progress towards that goal is not appropriate for general audiences. If you have a significant donor story that you can share as a blog post, that's great! If you received a nice note in the mail from a donor or recent disaster victim, you can share a picture of the note (without identifying the author) on your Facebook wall or Twitter account or blog. Also, if you have had a successful Online Heroes campaign, publicly thanking your top fundraisers is a great way to keep them engaged and feeling good about the work they've done for your chapter.

Measuring the Impact of Social Engagement

As social engagement is integrated into your operations, make a plan to report relevant information, trends, action items, successes, and challenges to appropriate decision-makers internally.

Measurement
Develop several performance indicators against which you measure your social engagement activity. While it is hard to quantify human relationships, it is possible to demonstrate how your networking abilities strengthen the fabric of your community, support for the Red Cross, the reputation of the Red Cross, and the efficiency and quality of Red Cross services.

Here are tips on how to approach measurement and how to capture data that helps demonstrate the efficacy of social engagement:

- Wherever possible, tie your community's social contributions to offline actions. Is your social community helping to increase blood donations? PHSS course takers? Are people inspired to prepare? To donate?
- Focus on representing meaningful engagement rather than audience size or impressions. How many people shared your content with friends? How many left a comment, liked, or replied in some way to you?
- When looking at traffic or volume of mentions, are there any abnormal spikes or dips? Drill down and figure out what events may have caused these.
- Compare your data with:
    - Results from previous time periods (e.g. Mentions of Red Cross in January versus December, or the year before, or two years before)
    - Other Red Cross related topics (e.g. different lines of business, subjects we are interested in)
    - Other organizations (e.g. FEMA, Salvation Army)
- Provide a framework for your data. Numbers and figures need context in order to be valuable, so give anecdotal evidence of impact from your social monitoring.

In order to help gauge which content is most engaging to your audience, you can use Facebook's new Insights page (only available on organization pages), or look into the link tracking tools available through Hootsuite and Tweetdeck. These tools help you see the reach of your online program and can inform future content decisions.

Read more about measuring social activity:
Fenton Communications See, Say, Feel, and Do
KDPaine's PR Measurement Blog
Web Strategy by Jeremiah Owyang
Beth's Blog, Measurement Category