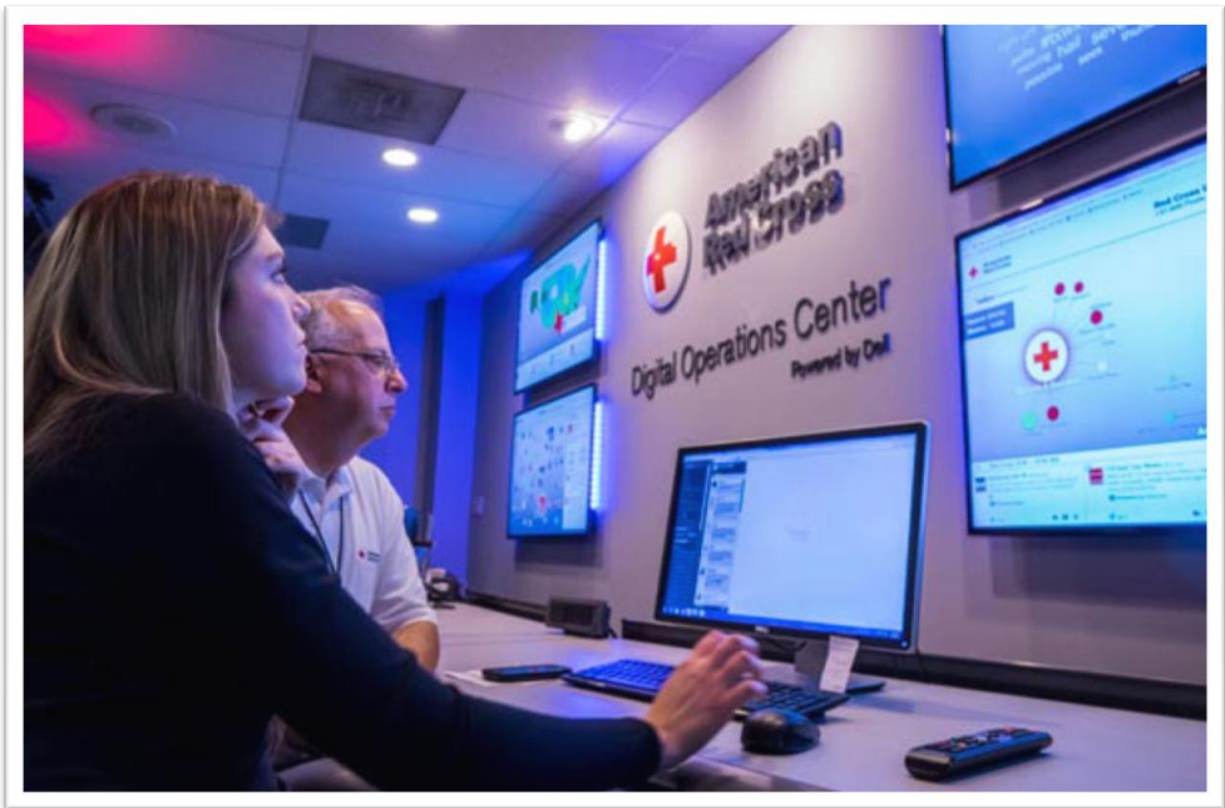


Social Engagement Handbook

FY 15/16

Written by:

National Headquarters Social Engagement Team



**American
Red Cross**

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Introduction

Who: All field units associated with the American Red Cross such as chapters, blood regions and SAF stations, are encouraged to consult this handbook for guidance in social engagement.

What: This guide contains tips and best practices for becoming a socially engaged field unit for the American Red Cross.

When: This is a roadmap for building a sustainable social engagement strategy. We encourage all field units to begin/continue building your strategies and programs, understanding this will be an ongoing and evolving commitment.

Where: Online and mobile social media platforms.

Why: Given the growing popularity and utility of social media, the American Red Cross has integrated these technologies into our operational DNA. Such innovations in communication can enable us to increase our relevance and reach as a humanitarian organization, and empower employees, volunteers and field units to participate in and be informed by their 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 in the social web – such as Facebook, Twitter and YouTube – include:

- Meet, serve and steward your community where they spend time – online.
- Build an everyday relationship with your local stakeholders.
- Increase relevance in your community.
- Build fabric of support in your community.
- Help the Red Cross keep the “human” in humanitarian.
- Increase revenue, course takers and community participation.

How: The Red Cross is growing our network of staff, volunteers and supporters willing and able to engage the online social community.

Social Engagement Specialists:	Any Red Cross staff member who is (1) responsible for community management and generating content for NHQ/local field unit and/or (2) trained to engage with the public via official Red Cross social management platforms. Generally speaking, this would typically be the local Regional/Chapter Communicator and/or any appropriately assigned designee(s).
Digital Volunteers	Those volunteers who (1) have an interest in participating as a voice for the Red Cross in social media, (2) have completed the online Social Basics training course and Red Cross Digital Volunteer training, and (3) actively participate in social engagement activities at the local and/or national level during both blue and gray skies.

Social Ambassadors	Red Cross supporters/advocates who volunteer their social media influence to help us share specific Red Cross campaign content with their personal networks on a monthly basis.
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Red Cross Social Basics training is now available in an online, self-paced format and may be accessed via The Exchange and/or the EMBARC training system by searching “Social Basics”. This course is available to any Red Cross employee or volunteer interested in personally participating in the social web on behalf of the Red Cross.

We also encourage each field unit to recruit and train socially engaged volunteers and build local volunteer teams to engage with the public using an official branded voice on personal and official platforms during both blue and grey skies. This may also include virtual “deployment” to assist with monitoring and interacting within the social space on behalf of the Red Cross during disasters large and small.

Please contact the NHQ Social Engagement Team with any additional questions, suggestions, ideas and concerns at SocialMedia@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

- ☐ We have adopted a culture of listening, adapting and inspiring.
- ☐ We have at least one person spending one hour per day on social engagement.
- ☐ We are committed to listening to social conversations.
- ☐ We respond to stakeholders who address or mention us.

Activating a Social Engagement Strategy

- ☐ We proactively foster community building 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, providing regular, timely and accurate updates and information.
- ☐ We are a valuable resource to our community.
- ☐ We are networked with other Red Crossers around the country.

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, focus on empowering your community to share relevant content and/or connecting those in need of information or assistance with helpful resources. Social supporters are invited to help field units execute the mission of the Red Cross by way of engaging their own networks via their personal social accounts. By providing value and creating a safe, fun space for local residents, groups, companies and fellow nonprofit organizations to collaborate on the Red Cross mission, we can continue to develop critical relationships and capacity.

Identifying an Engagement Specialist

At least one person (Engagement Specialist) in your field unit - whether you're a chapter, SAF station or blood region - should be responsible for your unit's 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 one hour per day to social engagement.
- ☐ Has completed the American Red Cross Social Basics course.
- ☐ Is familiar with local projects, products, campaigns and operations.
- ☐ 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.

Recommendations for Managing Official Red Cross Social Accounts

- ☐ Make sure at least two staff members or long-term volunteers have administrative rights to your official social accounts. While a particular staff member or long-term volunteer may own the social engagement strategy, there should be a longer term commitment and continuity plan for rotating volunteers and even staff members to ensure day-to-day operations are not interrupted.
- ☐ Keep social platform logins and passwords safe, and make sure that appropriate people can access them as needed.
 - Passwords should contain a mix of letters, numbers and/or symbols so that they are difficult to guess. Change them on a regular basis.
- ☐ Reach out to the Social Engagement Team at NHQ for support and advice at any time – SocialMedia@redcross.org.

Listening

Social engagement means participating in conversations that happen on public social networking platforms such as Facebook and Twitter.

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

- **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 should be responsible for listening a minimum of one hour each 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. They may also want to alert the Engagement Specialist about potential engagement opportunities, such as addressing misinformation and misconduct.

- **Tools**

We encourage you to test various listening tools to determine which one(s) work best for you and your unit. Below are just a few examples of free, helpful listening tools:

- Facebook*
- Twitter*
- Hootsuite
- TweetDeck
- Social Mention
- Radian 6 (contact NHQ Social Engagement team for details)

** While Facebook and Twitter may be used for limited “listening” as defined here, their primary function is to act as engagement and/or search tools through which to drive conversations and respond accordingly to what is observed via listening.*

- **How to Listen and What to Listen for**

Using these tools, you can follow specific topics, keywords or trends. Additionally, having an understanding of popular social topics and trends will help you to create content that is relevant to the ongoing conversations.

For example: Hashtags will often be created to coincide with significant local weather events or disasters (i.e. #sandy, #txtornadoes, #napaquake). Searching and/or identifying these searchable tags on social networks will help you monitor the conversation around those topics. Incorporating these terms in your messaging will help to deliver your content to the audience seeking information on the specific topic.

Check out these tips on [how to identify the best hashtags for your content](#).

Resource: [4 Steps to Create a Social Listening Strategy](#)

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

1. Go to <http://twitter.com>.
2. Sign into your Twitter account.
 - a. You may choose to do this on other listening platforms as well.
3. In the search box, enter your desired keyword.
4. Check searches regularly – preferably daily.

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

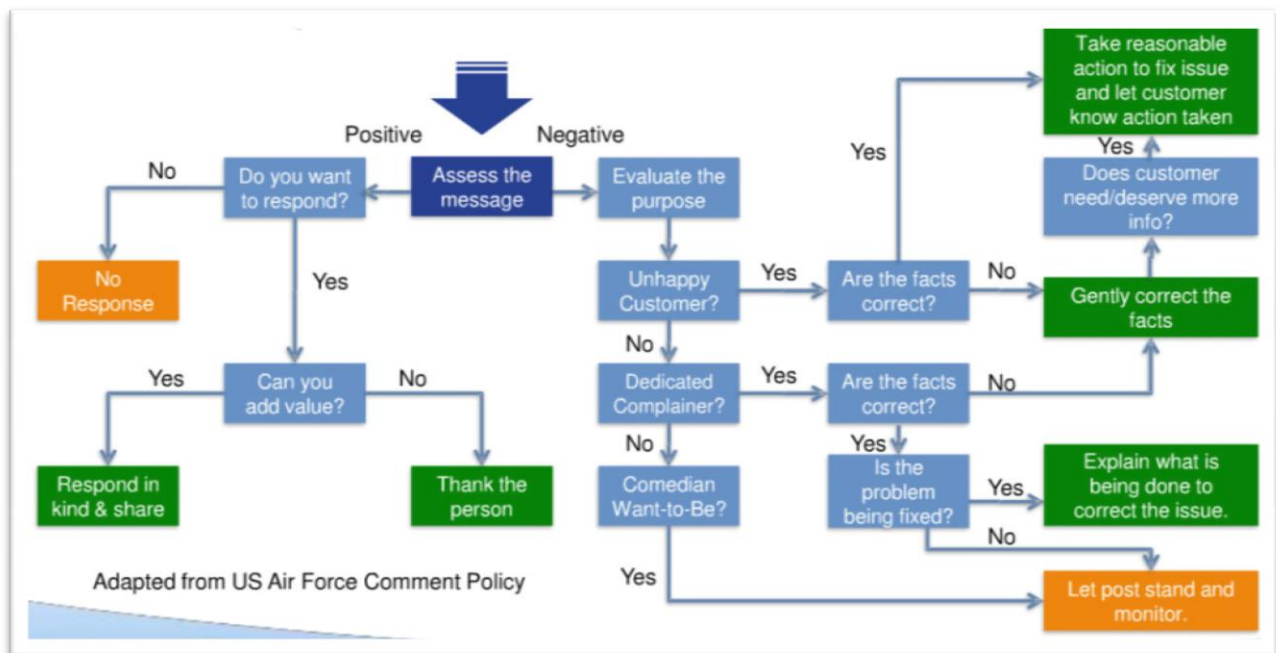
All staff and volunteers in your field unit are encouraged to participate in all discussions in their subject matter areas.

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 a relevant comment or question to your Facebook page, you should respond to that person on Facebook, even if it's a simple thank you or "like."

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, share information, inspire and connect community members together. Challenging comments are often opportunities to increase understanding of the Red Cross. However, beware of "trolls", whose sole intent is to post inflammatory comments and disrupt an online community.

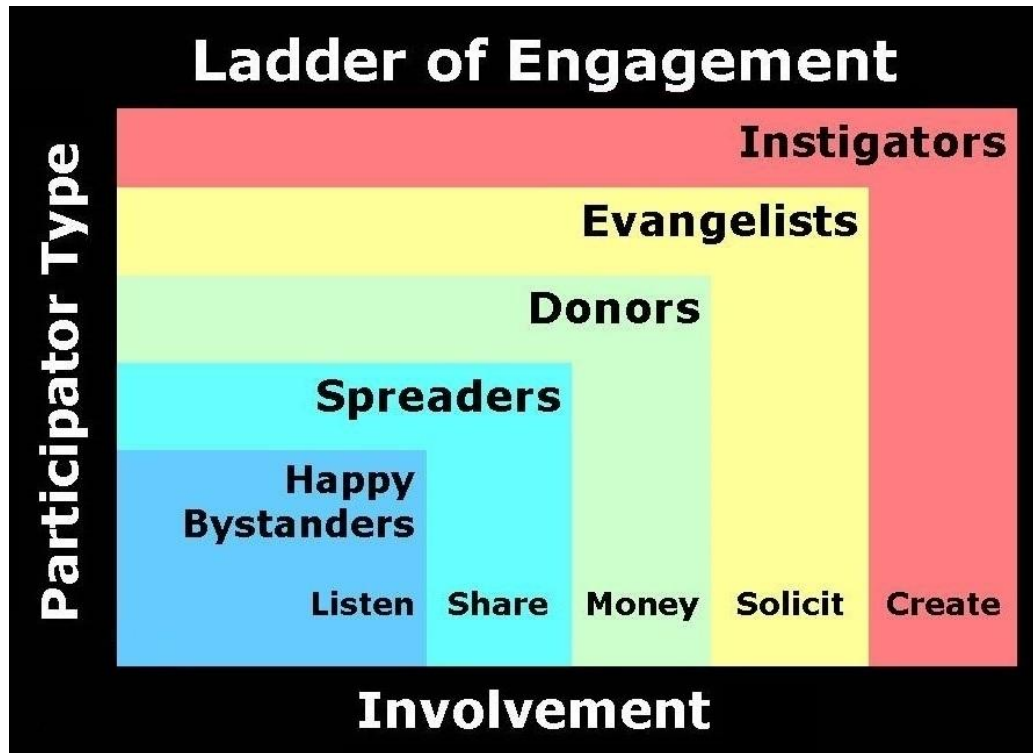
Talking with your supporters is a good thing! Engaging with detractors is also important, particularly as it relates to correcting the record and countering misinformation. However, your replies should not be talking points. Try to use a conversational tone, as if you were talking to your neighbors.



Social Engagement Strategy

Finding Your Community

The individuals who join your field unit's social communities will have different levels of interest for the Red Cross that span the ladder of engagement:



([Chart by Beth Kanter – Beth's Blog](#))

While a standard measurement of success used to (and may still) be your number of followers, we highly recommend that you prioritize quality over quantity. While it may be nice to have 10,000 "happy bystanders" involved, it is a community's vibrancy and participation which provides better value, stewardship and a sense of belonging. Strong online engagement, in turn, inspires community members to become more involved in the Red Cross mission.

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?"

Ideas for generating content:

- Launch/promote a campaign your community can get involved in: March is Red Cross Month, National Preparedness Month, Holiday Campaign, etc.
- Share inspiring stories of volunteers and/or donors who have made a positive impact.
- Respond to local disasters or deploy volunteers to a national disaster.

- Participate in community activities or events (festivals, drills, parades, etc.).
- Highlight interesting stories in the news that have a connection to the Red Cross mission.
- Promote upcoming events, with invitations to join - CPR/First Aid course; fundraising event; Heroes Breakfast. Invite your social community to spread the word, get involved and attend.
- Join appropriate trending conversations with Red Cross-relevant topics.
- Seek feedback, advice or help from your social community.

There are many more ways to brainstorm and generate engaging content suited to your audience and community. It is important to remember that the more creative and engaging posts are, the more likely you will have people responding to, sharing and acting on them. *Be human, conversational, personable and relevant!* And don't forget to include pictures/video whenever possible for a greater chance of getting noticed and inspiring action. Have fun, experiment, adapt and include your community as much as possible.

Don't hesitate to reach out to your local staff and volunteers for ideas and feedback. And of course reach out to the Social Engagement Team for questions and additional guidance at SocialMedia@redcross.org

Choosing a Platform(s)

Your Red Cross unit doesn't need to – and likely shouldn't – create a presence on every single social 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, the primary and preferred social platforms for local field units are Facebook, Twitter, YouTube, Flickr and Instagram. These platforms should be used to provide a comprehensive look at all aspects of the Red Cross active in local communities – that is to say that regions should maintain a singular “One Red Cross” presence on each platform, which serves to highlight all lines of Red Cross services. Individual lines of service are NOT permitted to have a social media presence separate from the region.

When and where possible, it is preferred that each region maintain a single social media account within the selected platforms. However, it is permissible to establish multiple pages to better align with the regional structure (ex. One Facebook/Twitter page per chapter) so long as all platforms remain adequately managed and maintained by the Regional Communicator and/or designated staff/volunteers.

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 an online 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.

Be Generous to Your Community

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

- Use shout-outs, likes, etc. as a means to acknowledge and/or thank followers who are interesting and/or have engaged with you.
- Publicly thank people for participating in a conversation.
- Contribute to conversations. Ask questions and participate in 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 important information and comfort in the moments when people are looking for it online will help sustain positive engagement.

- Be timely, accurate and relevant.
- Acknowledge a crisis as soon as possible, but only share confirmed information.
- Provide preparedness tips whenever they apply to a situation in your area.
- When there is not a crisis, prepare your community with tips and inspiring stories.
- Host a Tweet chat about specific Red Cross-related topics and issues.
- Participate in Tweet chats hosted by others on issues with a Red Cross interest.
- Like and comment on your local stakeholders' Facebook pages, blog posts, online media stories, etc. when and where appropriate.

Network with Red Crossers

There are several ways for you to engage with fellow Red Cross social engagement specialists across the country.

- Network with fellow Communicators and volunteers whenever possible.
- Search social channels for official Red Cross chapter and individual accounts.
 - The @RedCross lists entitled "[People](#)" and "[Local](#)" provide good starting points for identifying fellow Red Crossers on Twitter.
- On Facebook, join "[Red Cross Social Heroes](#)" group to connect with other Red Cross staff and volunteers active in the social space.
 - Prior to joining a group, please take the Red Cross Social Basics course.
- Create opportunities for your social community to meet in-person, such as a local Red Cross event.

Blue Sky/Grey Sky

While many best practices have already been mentioned (and are also explored in greater detail in Red Cross Social Basics, available through redcross.org/exchange and the EMBARC training system), the following provides quick reference points for Red Cross communicators.

Blue Sky

The term “blue sky” refers to periods between disasters, which offer opportunities to provide information, resources and conversation surrounding the day-to-day activities of the Red Cross. Engaging your audience/communities during blue sky periods is an excellent way to foster relationships, grow your online community and build trust.

Common Blue Sky Questions/Topics

- CPR/First Aid classes
- Blood donation inquiries
- How to become a volunteer
- General complaints/questions about services

Other Blue Sky Opportunities

- Highlight/thank local heroes, partners, donors, volunteers, etc.
- Discuss/promote upcoming events.
- Share helpful preparedness tips and information.
- Post fun facts about Red Cross lines of service and how to get involved.

Engagement with your online community during blue sky periods can have a tremendous impact that extends beyond the social space. Regular interaction helps keep communities connected, involved and heard. Additionally, regular engagement provides critical insight into the specific needs of your community, which helps improve our services.

Grey Sky

Whether responding to local or national disasters, the Red Cross mission remains the same – to prevent and alleviate human suffering in the face of emergencies by mobilizing the power of volunteers and the generosity of donors. Communication through social media platforms during times of disaster – “grey skies” - is simply an extension of that mission.

It is important to remember that during a disaster, those who are affected are under stress. As a result, they process information differently as they work to assess their specific situation and needs. This affects how we interact with them, as we want to be sure we are engaging effectively, accurately, compassionately and in a timely manner.

Common Grey Sky Questions/Topics

- How/where can I get help?
- What can I do to stay safe?
- How can I volunteer/donate?
- Question/clarification of information
- Rumors/misinformation

Interacting During Grey Skies

- Express empathy, honesty and expertise.
- Provide accurate and clear information, and be sure to clarify/correct misinformation.
- Provide action steps and/or connect with reliable information resource(s).
- Be human rather than simply recite talking points.
- Do not make up information. It's okay to say “I don't know.”

Ongoing interaction and engagement with your communities during grey sky periods not only provides stakeholders with important information, but also helps to build trust and credibility. It also demonstrates that those affected are being heard as conversations lead to meaningful action – from providing needed reassurance and comfort, to even identifying needs and redirecting services.

Measuring the Impact of Social Engagement

Having a plan to measure and report relevant information, trends, action items, successes and/or challenges identified via social channels is critical to the ongoing and evolving nature of your social strategy. This information helps to identify how you are being heard by your community, the value you are providing and opportunities to make changes in real time based on the needs and interests of your community.

Measurement

Measuring your social engagement activity is invaluable to understanding and meeting your community's needs, as well as effectively growing your online presence. While it is hard to quantify human relationships, it is possible to demonstrate how your networking abilities strengthen the fabric of your community, the 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 measure and report on your social performance:

- Focus on documenting meaningful engagement – shares, comments, likes, replies, etc. – rather than audience size or impressions.
- Tell the story behind the data. Numbers and figures need context in order to be valuable, so provide anecdotal evidence – screen shots of interactions, for example – that illustrate key insights, trends and learnings.
- Wherever possible, tie your community's social contributions to offline actions. Is your social community helping to increase blood donations, enrollment in PHSS courses or donations? Are more people motivated to take steps to prepare for disaster?
- As you gather your data, evaluate which types of content resonate the most (and least). Also take note of timing and/or external events that may have affected content performance.
- 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)

There are several tools available to help analyze which content is most engaging to your audience. Facebook's Insights offers fairly comprehensive analytics, as does Twitter's analytics tool at analytics.twitter.com. You may also find useful tracking and engagement information in platforms such as Hootsuite, Tweetdeck, Bitly, and [any number of others](#). Any and all of these tools will help you see the reach of your online program and can inform future content decisions.

Fundraising and Social Media

Social media enables us to compellingly tell the Red Cross story and inspire people to action, whether to recruit volunteers, donate blood, sign up for a class, or make a financial donation. There are many nuances to consider when it comes to fundraising in the social space, so we encourage you to work closely with your fundraising point of contact, and feel free to reach out to the Social Engagement Team with your questions.

We must carefully choose those moments to issue a fundraising ask. Frequent solicitations for donations can cause fatigue and ultimately diminish returns on engagement.

- **Transparency is Key.** When making a financial ask, it should always be clear where the donor's dollars will go. When sending donors to [Redcross.org/donate](https://redcross.org/donate), follow this landing page language as closely as possible.
- **Know the Designation.** If the selected designation is "Where it is Needed Most," the donor's dollars could go to any Red Cross line of service. If the selected designation is "Disaster Relief," this donation could go to any Red Cross disaster response effort, large or small. Please review these [Disaster Relief solicitation guidelines](#). When soliciting for Disaster Relief, contact DisasterFundraising@redcross.org with any questions.
- **Publicity Rights.** Any time we use an image or video in a social media post, we must make sure that we: a) have the rights to use the photo or video from the photographer or videographer, and b) have a photo release on file for each recognizable individual featured in the content. Please contact Office of General Counsel with questions about publicity rights and c) ensure that the image or video matches the fundraising ask without being specific to a particular event (e.g. ask for disaster relief should include a generic disaster image).
- **Celebrities.** Celebrities should not be featured in a fundraising ask without clearance from the Celebrity Team. Please contact Becky Sendrow for questions (becky.sendrow@redcross.org)
- **Elected Officials.** Elected Officials should never be featured, either named in the text or featured in photo, paired with a fundraising ask on Red Cross channels. Please contact Dawn Latham of the Government Relations for questions (dawn.latham@redcross.org).
- **Donor Engagement.** Thanking donors on social media is a great way to keep them engaged. Work with your fundraising team on ways to acknowledge donors. When and how to thank donors on your channels is up to your discretion.
- **We're Here to Help!** There are many factors to keep in mind when making a fundraising ask on social media, and each situation will have its own nuances. The Social Engagement team is happy to help guide you through any questions you may have. Please contact socialmedia@redcross.org with questions.

NEW IDEAS!

Social media is constantly evolving and being used in new and creative ways. If you have any questions about any of the recommended practices in this handbook, if you have an idea you would like to try, or should you have questions about fundraising through social channels, please don't hesitate to contact the Social Engagement Team at SocialMedia@redcross.org.