



SOCIAL MEDIA: A BRIEFING FOR CHARITY CEOS

ZOE AMAR AND
MATT COLLINS

social CEOs

ZOE AMAR COMMUNICATIONS

Strategy|Marketing|Communications|Digital|Social Media

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INTRODUCTION

ZOE AMAR AND
MATT COLLINS

A growing number of charity CEOs are using social media themselves to build relationships with stakeholders, keep abreast of breaking news or simply to champion their charity's cause.

Whilst we think that many of our sector's leaders are pioneers in this area, we know from our work that there are plenty who would like to get to grips with the key issues in personal social media presences, from using social to engage staff to its role in recruiting the best people for your charity, governance and thought leadership.

THE ELECTION AND MOUNTING PRESSURE ON CHARITIES TO BE MORE TRANSPARENT MEAN THAT CEOs AND THEIR BOARDS CANNOT AFFORD TO IGNORE THE OPPORTUNITIES AND RISKS INHERENT IN PERSONAL SOCIAL MEDIA PRESENCES

Our briefing will give you insights into cutting edge thinking in social media. It includes guidance from experts such as our sponsors Grant Thornton and TPP Not for Profit. It also includes advice from leading charity law firm Farrers and case studies of CEOs who are all tweeting and blogging to help them be even more effective leaders. The stories of Steve Ford from Parkinson's UK, Ruth Sutherland of Relate and Mark Flannagan of Beating Bowel Cancer show the value of being a social CEO and how good social media skills are open to everyone. We hope their stories will inspire you as much as they have us.

The election and mounting pressure on charities to be more transparent mean that CEOs and their boards cannot afford to ignore the opportunities and risks inherent in personal social media presences. This briefing will help you and your organisation be recognised by the right people, build its case for support and preserve its reputation in uncertain times.

Do get in touch with us if you have any questions.

ABOUT ZOE AND MATT

Hi, I'm Zoe

Zoe Amar is director of Zoe Amar Communications, a marketing and digital communications consultancy who've worked with leading charities including Macmillan, Action Aid, Charities Aid Foundation and Crimestoppers. Zoe also writes for The Guardian about charities and communications and sits on the advisory panel for The Guardian Voluntary Sector Network. She is an associate lecturer in social media at Anglia Ruskin University on the degree in charity and social enterprise management and is a trustee at national charity CACHE.



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ZOE AMAR COMMUNICATIONS

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Hi, I'm Matt

Matt Collins is the MD of Platypus Digital, a digital marketing agency for charities and other organisations doing great work. He's a digital marketer who believes in the life-changing power of the internet to spread charities' messages and connect their supporters. He spent 10 years working for charities large and small, from St John Ambulance and CSV to Chance UK and BeatBullying. He went on to train formally in digital marketing with General Assembly and set up Platypus Digital in 2014. They now deliver campaigns, training and consultancy for charities who want to use digital channels better to raise more money and reach more people.



MATT COLLINS

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Platypus Digital

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We are delighted that the 2014 Charity #SocialCEOs Awards are in association with Grant Thornton

Grant Thornton

Grant Thornton's charity and not for profit team provide bespoke audit, tax and advisory services to over 800 organisations around the UK. Ranked third by income audited, our accredited specialists work from seven regional locations to ensure our clients are serviced by knowledgeable staff who are kept abreast on all charity sector and technical issues as they arise. Our involvement in the sector is vast including an annual seminar programme, NFP Interchange, our Non-Executive Forum for Not for Profit organisations run in partnership with the Guardian, membership of the SORP Committee, frequent commentary in the sector press, thought leadership on subjects such as governance in the top 100 charities as well as regular speaking and attendance at all key sector conferences.

For more information, please go to Grant Thornton's website or contact **Carol Rudge**, Head of Not for Profit or **Louise Hughes**, Not for Profit Marketing Manager on **020 7383 5100** or email carol.rudge@uk.gt.com or louise.hughes@uk.gt.com



TPP Not for Profit – the charity recruitment specialists

At TPP, all our consultants are sector specialists, able to offer the best advice and service to both our candidates and clients. TPP's divisions cover the full breadth of charity roles and we take pride in supplying the best staff available for our clients.

We also offer a range of **free services** to help support the not for profit sector.

FOREWORD

Simon Blake OBE is CEO of Brook and you can find him on Twitter @simonablake

Social media is changing the world

Social media has changed and continues to change the way we think, the way we communicate and the way we operate as individuals and organisations. Social platforms are democratising knowledge, building communities, connecting people and creating transparency like never before. It will continue to provide more and more platforms for more and more people to have their voice and in turn for organisations with a social purpose to reach more and more people. Social media is shining the light on the good, the bad and the ugly in different, creative and fascinating ways.



BY SIMON BLAKE

“I OCCASIONALLY MEET, OR READ ABOUT SENIOR LEADERS WHO ARE PROUD THAT SOCIAL MEDIA ISN'T HAVING AN EFFECT ON THE WAY THEY WORK. THEY SAY THEY ARE PROUD THEY 'DON'T WASTE THEIR TIME WHEN THERE ARE MORE IMPORTANT THINGS TO BE DONE THAN TWITTERING ON TWITTER.' THIS ISN'T, IN MY VIEW, A SUSTAINABLE OR CREDIBLE POSITION FOR MOST CHIEF EXECUTIVES.”

Whilst social media is not, and will never be a universal panacea, it is and will increasingly become an essential tool to help us and our organisations achieve our social mission and goals.

Social media is not a distraction or a phase. Used well it will continue to provide more and more exciting opportunities for charities and other companies with a social purpose to connect, inform, transform, gain support and deliver services in new and different ways.

Putting digital at the heart of your strategy

Good Chief Executives and their senior teams know they must take responsibility for ensuring a digital strategy for their organisations - facilitating and sponsoring innovation in their organisations and modelling the importance of trial and error. Zoe Amar and Matt Collins are social media innovators, pioneers and advocates who continually help, cajole and nurture the sector to use social media in creative ways.

Here they help us again by providing sensible and trustworthy guidance for us to ensure our organisations use social media to best effect, and that we venture into this still uncharted territory with the confidence, verve and pricked ears that good leaders need.

HOW TO USE SOCIAL MEDIA TO RECRUIT AND RETAIN TOP TALENT

Jayne Morris is CEO of TPP Not for Profit, the charity recruitment specialists. You can find them at www.tpp.co.uk or on Twitter @TPPNotforProfit

We at TPP feel that social media is key for CEOs in attracting the best people to their charities- and keeping them on board.



BY JAYNE MORRIS

Here are a few of our top tips:

Use your network to recruit

As a charity CEO, why not use your social media network to boost your recruitment efforts?

Simply post a status update on LinkedIn or a post on Twitter about the role, including a link to the job application details . The hashtags #job,#charityjob or #fundraising will make your vacancy more likely to be found.

Social media offers candidate insights

Your HR department should check that the employers and dates on candidates' CVs match their LinkedIn profile. However, you might also want to do a quick Google of candidates before you interview them as their social media profiles can reveal useful information.

If candidates have endorsements from previous employers/ clients on their LinkedIn profile, or are actively engaged talking to other charities through tweeting or blogging then that is a good sign of their passion, ambition and commitment to the sector. Digital is a growing part of everyone's job, after all.

.....
IT'S INCREASINGLY LIKELY THAT ANY FUTURE EMPLOYER WILL EXPECT YOU TO BE ABLE TO MASTER SOCIAL MEDIA.
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Boost your personal brand

When considering your next move, your digital footprint could give you the edge. It's increasingly likely that any future employer will expect you to be able to master social media.

Think of your LinkedIn profile as your portfolio and add examples of presentations and reports, as well as including personal awards, volunteer experience and speaking opportunities. Creating a Twitter feed and personal blog will give you a chance to build up an impressive online track record.

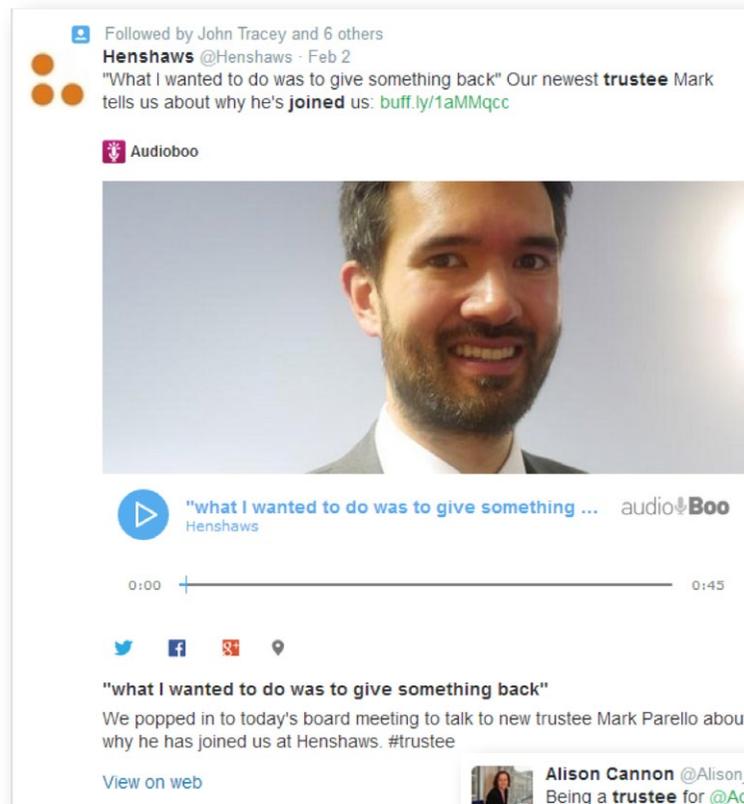
Encourage your trustees to use social media

Trustees can seem rather remote from any charity, but social media offers a great way to increase engagement in both directions.

Typical ways in which trustees can use social media include identifying themselves as a trustee in their profiles and promoting the organisation's aims, retweeting content posted from the charity's official channels and contributing to discussions among the charity's supporters and users (where appropriate).

HOW TO USE SOCIAL MEDIA TO RECRUIT AND RETAIN TOP TALENT

Here are some creative ways charity trustees have used Twitter to promote their charities.



Social media also offers excellent opportunities for trustees to work collaboratively, so projects and discussions can progress without having to wait for the next trustee meeting, for example through a closed LinkedIn group.

HOW I USE SOCIAL MEDIA TO ENGAGE

Steve Ford is CEO of Parkinson's UK. He tweets from **@SteveGFord**

This was a great time to develop my social media presence. At Parkinson's UK we are going through lots of changes, we're looking to take a bigger lead in the research community, increase public awareness, develop new networks and partnerships, and we're moving our digital strategy forward. Twitter is the ultimate platform to share this and raise my profile as the charity looks to take on a more prominent role.



BY STEVE FORD

Social media is invaluable for engaging staff and volunteers

Being on Twitter is a way for me to connect directly with the wider Parkinson's community including people with the condition, staff, carers, volunteers, researchers and supporters, as well as other key charitable and political figures. I use Tweetdeck – once it's set up, it's easy to dip in and out of between meetings. But by using social media there is the added benefit of showing the rest of my staff how they could also get involved in digital, to lead from the front and to promote the great work that Parkinson's UK does to a more diverse audience.

Get a plan

I was already tweeting but needed the advice of my digital team to develop things further. They put together a plan for me, including ideas for who to follow, and rough figures around how often I should tweet and retweet. My aim was to be more purposeful about doing it as part of my job. Other than that, I just had to get stuck in and give it a go.

"I'VE LOVED THE CONVERSATIONS I'VE HAD WITH OUR SUPPORTERS ON TWITTER. IT'S GOOD TO BE ABLE TO THANK A SUPPORTER OR HEAR ABOUT THEIR EXPERIENCES."

Talk to supporters and network

I've loved the conversations I've had with our supporters on Twitter. It's good to be able to thank a supporter or hear about their experiences. I once got involved in a discussion with someone who was criticising our research and he subsequently joined our Research Support Network. Twitter is also great for building relationships with influencers, one example being a conversation with Norman Lamb about poor quality Parkinson's services, triggered by my appearance on Newsnight. Our charity's culture is all about building relationships with people and being transparent, so Twitter is a good fit.

Thinking about the future

In six months' time, I hope Twitter will be an even more natural part of how I work. I want to inspire our people to make the most of digital in their work.

I'm also keen to use LinkedIn more to engage with key stakeholders. It's got lots of potential for professional audiences like researchers and decision makers.

HOW I BECAME A SOCIAL CEO

Ruth Sutherland
is CEO of Relate.

Most of my work – and what we do as a charity – involves talking to people and building relationships. Social media helps me widen these conversations, and I see it as a powerful force for change: I believe it has an important role to play in social justice, particularly when it comes to relationships.



BY RUTH SUTHERLAND

I lead Relate through inspiration, not direction. Now I'm spreading the word about what we do via Twitter. I think it's part of the CEO role now and I'd love others to join me. I'm working on the basis that if I can do it, anyone can.

An article I wrote about an argument over DIY with my husband had good feedback. I'm more than happy to talk about my life in relation to my work as it brings colour and meaning. I feel passionately about the cause and, to an extent, I am the brand. I recently saw padlocks signed by couples attached to Millennium Bridge, which made me think about all the people, relationships and personal stories which bind us together. Social media offers a way to be spontaneous: to share such observations. It's a welcome outlet for the CEO role, which can feel restrictive.

Twitter learning

With a million people a year using Relate's services, increasingly through digital channels, I believe I have a responsibility to learn and make the best use of this new language. I'd like more people in our organisation to use social media: we have a lot of people but not much money, and it extends our reach and impact. I'm being coached by younger colleagues and enjoying being the learner.

At first, Twitter seemed like a chore. Like many newbies, I got confused by following too many people and not understanding the culture. My first pretend tweets were rants to my Comms director while I was shouting at Question Time on TV in disagreement with the panellists.

'Step away from Twitter!' he advised. Of course I'm aware that taking care with what I say on Twitter is a responsibility that comes with being a charity, but the freedom to have wider conversations is liberating and welcome.

I started my journey into social media by deciding on my own personal brand values and setting out what I hoped to achieve. My team have dubbed me 'The Change Maker' and made me a branded coffee mug as a constant reminder to think about what to tweet.

Putting people in the picture

Now I'm excited about talking to new people and organisations. I'm also looking forward to demonstrating our brand and dispelling some myths. Relate is a well-known brand with high recognition rates, but people don't necessarily understand all the ways in which we can help. We're about promoting quality relationships and it's a misconception that we want people to stay together regardless of their circumstances: we're acutely aware that families come in all shapes and sizes. We've been doing same sex counselling for more than 30 years. I'm looking forward to sharing our stories, insight and observations. Via Twitter, of course.

GOVERNANCE: MANAGING RISKS OF PERSONAL SOCIAL MEDIA USE

Carol Rudge is Head of Not for Profit, Grant Thornton UK LLP and tweets from **@CarolRudge**. Read more about Grant Thornton's work on social media and governance: <http://ow.ly/yWtUY>

Opportunities for those in charities to use social media on a personal level to further their charity's cause are huge – share news, add your voice to debates, attract new supporters. However, this personal element introduces risks that must be understood and managed when using social media.



CAROL RUDGE

Every leader understands the importance of good governance and risk management. Apply this to personal social media use in your organisation to avoid the pitfalls and make the most of opportunities that social media brings your way.

Know the risks

Not all trustees need to have extensive knowledge of social media, but having a board member with interest and experience in social media can help spread knowledge. Does your board understand what social media is, how it differs to 'traditional' media, how it can be used to further charitable aims, and the pitfalls?

Include personal social media use in risk assessments. Awareness of the risks and how they can be managed/avoided when using social media at senior management and board level help set the tone for your teams.

Keep policies simple

Specific guidance on social media for every level, from board to operational staff and volunteers, helps different roles to understand the risks and manage them.

Keep guidance simple, easy to access and remember and people are more likely to follow it (examples: <http://socialmediagovernance.com/policies/#tabs-61-tab-6>).

Are you watching?

Monitoring conversations on social media is a key way to manage the risks and can give insights into how your charity – and you! - are perceived. Ask your communications team to monitor mentions of your name as well as the charity's. Tracking tools report on keywords and sentiment in content, so you can step in if negative or false reports are circulating. It also creates opportunities to feed into beneficial conversations at the right time (#nomakeupselfie is a brilliant example of how £8million was raised for Cancer Research UK in 6 days).

Make it personal

As senior colleagues migrate to social media, they face the challenge of balancing security and personality. Regular security checks, password changes, 'on-brand' messaging are important, but remember to humanise your charity!

You don't need different accounts for business and personal use. Be authentic, open and honest on social media and within your charity's policies.

PERSONAL SOCIAL MEDIA PRESENCES AND THE LAW

Jennifer Agate
is an Associate
at Farrer & Co LLP

Despite the increasing prevalence of social media, many users remain uncertain as to the legal boundaries. For CEOs using social media in their personal capacity, the key issues are liability and ownership.

Account ownership

A loyal following can be a valuable asset, making social media contacts a potentially sensitive area. An account in the charity name will generally belong to the organisation and should be protected as part of its brand.

In the eyes of the media, prominent members will generally be associated with the charity no matter what disclaimers they use, making controversial comments made in their personal capacity potentially newsworthy. To maintain both ownership and privacy in personal posts, privacy settings are essential.

Legal risks

In simple terms, the legal risks are the same as those associated with traditional media. As Sally Bercow discovered to her cost, it is as easy to defame someone in 140 characters as in any other publication, easier perhaps, as the informality can lull the user into misguided comments. Other frequent pitfalls include unintentional breaches of confidentiality, intellectual property infringement and even discrimination.

For the CEOs of charities there is of course the additional sensitivity attaching to the expression of political opinions, particularly pertinent in the run up to election year.

Once a comment has been posted, even when intended for a selected audience, the post can be shared by other users, meaning that the poster has no control over forward distribution.

It is good practice for charities to prepare (and enforce) a social media policy as part of their overall risk management strategy. This will enhance awareness of acceptable use and help protect the charity from liability. A policy will also assist with the transparency of the disciplinary process, should it come to that stage.

Dealing with negative posts

A public account can also mean dealing with negative posts, ranging from legitimate expression of opinion to 'trolling'. In dealing with both, take a step back and consider whether you need to engage before responding. Where criticism crosses acceptable boundaries, there are remedies under both the civil and criminal laws.



BY JENNIFER AGATE

Key points to remember

1. Maintain separation between personal and professional profiles.
2. Don't post anything, no matter how private your settings, that you wouldn't want to be made public.
3. When facing negative posts take a step back before responding.

MY PERSONAL SOCIAL MEDIA STRATEGY

Mark joined Beating Bowel Cancer as CEO in July 2010. He has worked at a senior/board level in a number of high profile organisations, including: the Royal College of General Practitioners; the Royal College of Nursing; Diabetes UK; the BBC; and the homelessness charity, Crisis.

Mark is on Twitter
@MarkFlannCEO

From care to cake

The problem with being asked to write about a good personal social media strategy is that it is personal and, therefore, anything but strategic. Instead, as a cancer charity chief executive, my approach to social media is largely instinctive.

If there are rules then “Care to cake” sums it up. I do try and be there for people, appropriately but without seeking to do the job of our Helpline nurses. As Chief Executive, I listen to people, and use that to get a sense of why we exist and where we can help.

But it is also about the people – our “family”, in the words of one of our supporters, who very sadly is no longer with us. That is why, as I would with my own family, I feel free to share the “cake” in my life. I occasionally tweet about baking, to show what goes on in my world outside of official communications and requests for donations.



BY MARK FLANNAGAN

My Twitter rules

So here are some of my lessons learnt, which I hope are helpful, and which are mainly about Twitter:

1. It's personal. Let people know the real you, not just announcements. Whatever you say, let it come from you, not your staff.
2. Know your role. I'm there for people, but I don't try to do the job of our nurses who support individuals facing cancer professionally and compassionately.
3. Obey. Listen to any feedback your communications staff have about what you tweet.
4. Play. Social media should be a spare time occupation – on the train, over lunch, during down time. Not a chore as part of the work day.
5. Be spontaneous. If you see something that interests or amuses you, share it.
6. Integrate. If you blog, then link to that and update regularly. It gives more space to explain and expand beyond the 140 characters on Twitter.
7. Enjoy. Our contact with supporters, donors and others can be too formal most times. Social media breaks down the barriers and lets you speak as an individual. It is immensely rewarding, even heart breaking at times, but always worth it.

Social media is just another form of communication. Sometimes you are talking, sometimes you are listening, often both. Just let it happen and enjoy it all.

HOW TO BE A THOUGHT LEADER ON SOCIAL MEDIA

Zoe Amar is Director
of Zoe Amar
Communications.
She tweets @zoeamar

Donors, politicians and the media have forced the charity sector into a new era of greater transparency. An effective way to meet this need is to make sure that CEOs and their leadership teams are as visible as possible on social media.



BY ZOE AMAR

Yet even that isn't enough. In a time of change trust is valuable currency for charities and one way to earn it is to position your organisation as the 'go-to' charity in its field, with the CEO as an opinion leader. Here's how you can do this.

1. Share ideas

Blogging and Twitter are great platforms to share your ideas. You can influence the agenda by undertaking guest blogs for some well known sites. CEOs such as Ciarán Devane now write for sites such as The Guardian and the Huffington Post. Blogs are brilliant for sharing insights and giving your organisation's mission a human face. As with Twitter, share ideas but see them as a way to start a conversation with your audience.

2. Move and inspire

Whichever platform you use, it can be tempting to focus on facts alone, e.g. every detail of the research project you're proud your charity has undertaken. To paraphrase Maya Angelou, people may forget what you said or did but not how you made them feel. You can use social media to inspire and motivate your audience, especially when the going gets tough.

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EVERY GOOD NETWORKER KNOWS THAT IT'S NOT JUST ABOUT WHO YOU MEET BUT HOW YOU CAN ADD VALUE BY BRINGING PEOPLE WHO COULD HELP EACH OTHER TOGETHER
.....

3. Bring people together

Every good networker knows that it's not just about who you meet but how you can add value by bringing people who could help each other together. Julie Bentley, CEO of Girlguiding, is a great example of this. It's quick and easy to introduce people on Twitter and also helps position you as a leader with a valuable network.

4. Manage different perspectives

If you're encouraging your board and leadership team to use social media, then you may have to accept that they have slightly different perspectives on key policy issues for your charity, even if you all share the same values. It's worth discussing how you will handle this as an organisation, including the risks and opportunities in having a range of perspectives on social media. As the CEO you'll need to lead from the front on this and shape how your charity is perceived as a thought leader.

THE LATEST SOCIAL MEDIA TRENDS FOR CEOS

Matt Collins is MD of Platypus Digital. He tweets [@charitychap](#)

The very nature of social media is an appetite for the fresh and the new. Staying ahead of the curve is therefore essential for any CEO who wants to do social media well.

Here are four top tips for the social CEO who wants to do that little bit extra.



BY MATT COLLINS

Hit the front line

Everyone from your colleagues, your best friend, and leaders like Mark Zuckerberg, Tim Cook and Alex Salmond has accepted the challenge to dump a bucket of ice water over their heads for charity in 2014. They have raised millions in a very short space of time.

The fact that such world famous CEOs took on the challenge is evidence of a new trend - CEOs hitting the front line. It's no longer enough to stay in an ivory tower and issue decrees - the modern leader has to champion the cause, get their hands dirty, and publish the proof on social media.

Be a thought leader

LinkedIn now allows anyone to publish blogs on its platform. This allows strong ideas and beliefs to spread with extra authority.

With LinkedIn now the dominant social media player in the B2B scene, this means that real leaders can't just lead their own organisation - they need to lead their entire field of work.

So build up your connections, your activity in Groups, and publish well thought out long-form pieces that spark debate and inspire others.

Be transparent

The debate surrounding charity chief executives' pay has massively increased the need for transparency. How are you proving that your pay is charitable money well spent?

Using Twitter to publish updates on your working day is no longer optional. Who are you meeting? What projects are you working on? What are the outcomes of this work that leads your cause closer to its goal? Your audience needs to know.

Knowing that you'll be subject to this public scrutiny will focus your efforts on what really makes a difference to your cause.

Use micro-video

Video platform like Vine are increasingly essential. Can you compress your message into a six second video?

M&C Saatchi did for **World No Tobacco Day**. The targeted message that a smoker dies every six seconds hit home in a way that a simple tweet never could.

Give your audience and glimpse of the real you and inspire them with micro-video.

KEY QUESTIONS ON PERSONAL USE OF SOCIAL MEDIA FOR CHARITY CEOS AND THEIR BOARDS

1. How can I use my social media presence to build support for what my charity does and to develop valuable relationships with decision makers?
2. How are CEOs of similar charities to mine using social media to demonstrate transparency?
3. Would social media be a good way for me to engage with staff?
4. How can I use my network on social media to attract and retain the best talent for my organisation?
5. Have my board and I discussed the governance and legal issues involved when my staff and I start tweeting?
6. How can I use social media to position my charity as a thought leader and the 'go to' expert in its field?
7. What opportunities do the latest social media trends offer me?

Get in touch

Get in touch to find out how we can help you.

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