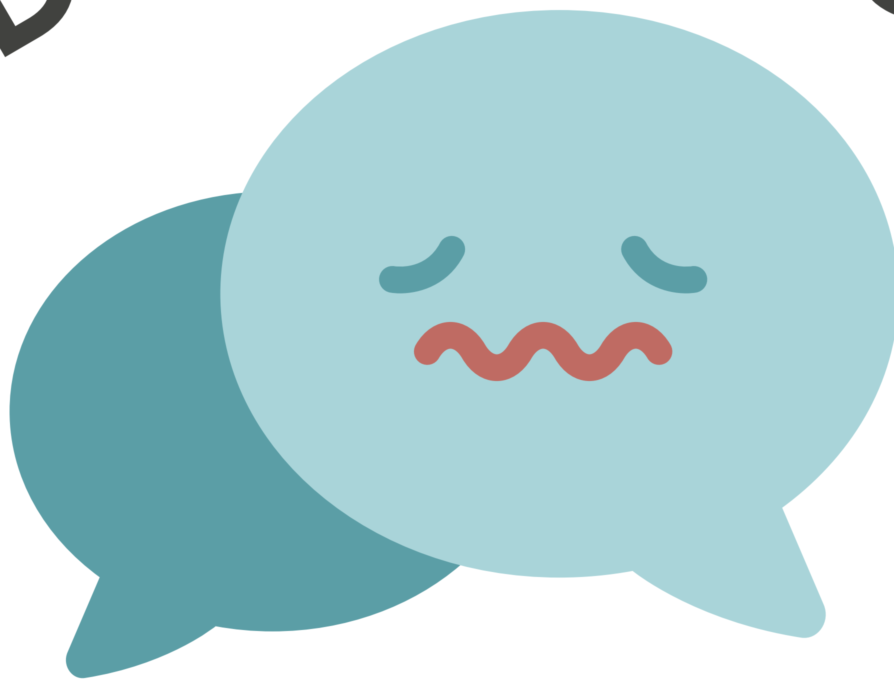
DON'T PANIC!



SOCIAL CONTINGENCY FOR NONPROFITS & SMALL ORGANZATIONS

OBERDIN CONSULTING

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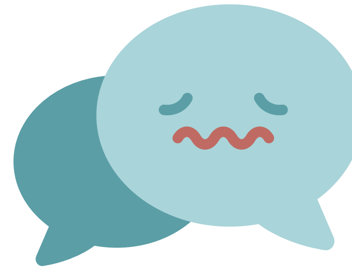
Welcome to the Social Media Contingency Planning Guide!



The last few years have been a LOT, and you've probably had people change jobs, get sick, or move away. When you use social as part of your communications plan, it can be nerve-wracking to think about what might happen in an emergency, so now is the time to start creating a contingency plan!

Before we get started, let's look at what a good contingency plan includes, shall we?

In my experience with other small nonprofits and civic organizations, a good contingency plan includes the following:

- Documentation of your organization's social media processes.
- The selection and training of a backup in your organization to be able to write, post, and schedule content and manage comments or queries through social channels.
- The identification of 2-3 people at your organization who can be attached to the accounts with admin access (like Facebook or LinkedIn) and provide them with access to your passwords for single-sign-on channels (like Twitter or TikTok) as well as access to the email associated with your social program.

Throughout the guide, I'll speak to you (the person reading) as if you are the social manager for your organization. If you aren't - and are someone who manages them - that's great! I'm so glad that someone outside of the social media manager in your organization is concerned about contingency planning.

If you are a social media person or the "wears all hats, which includes social" person, please don't try to do this all at once. Please take it in stages, starting with Step One. Ideally, all the steps should take you between 2-3 months to finish.

If you are the manager of the social person in your organization, know that your social media manager is likely handling a lot. So please don't throw this on their plate with the expectation that the contingency plan can be finished in their spare time. This is essential work and should be treated as such.

If you have questions, you can ask me! Please email me at corrie@corrieoberdin.net. I give free, 30-minute consults to small organizations looking to create contingency plans on their own, or I can work with you to create one that works for your organization!

I'VE FOUND IT HELPFUL TO USE STAFF TRANSITIONS AS AN OPPORTUNITY TO CREATE CONTINGENCY PLANS. I TYPICALLY MAKE THEM FOR CLIENTS THREE MONTHS AFTER WE'VE LAUNCHED A SOCIAL PROGRAM (SO THAT THE PROCESSES WE DOCUMENT IN STEP ONE ARE SOLID) OR WHEN A NEW COMMUNICATIONS MEMBER JOINS THE TEAM.

1 SPELL IT OUT

Step One: Document your social media processes.

You can't teach what you don't document. The first thing to do is document how your organization does social media. This is arguably the BIGGEST portion of the contingency plan but take it slow to make sure you capture everything!

First up in your process document should be the following three things. If you do NOTHING else in your social contingency plan, document them! They will be the most helpful items in an emergency:

- A list of the social accounts and their passwords (& who has access – see Step 3 for more information) and any usernames/passwords for supplemental accounts (Canva, Linktree, etc.).
- How to post and schedule content on all your social media channels. Think granularly here and write it out step-by-step. It helps if you write out the steps while posting and scheduling content. As you post or schedule, write out each discrete step you take.
- How to respond to comments, questions, and direct messages. Like with the posting & scheduling steps above, it helps to write this out while you are doing it. You also get bonus points by including draft responses for frequently asked questions.

Next, you can move on to supplemental information. These items are for longer-term leaves when your regular person (who might be you!) may not be able to handle writing content in addition to posting it.

- The frequency that you typically post to each social channel. Often, we'll post at different frequencies to different accounts. Specifying this will help in an emergency by identifying the best practices for your organization.
- Where to find your content calendar. (It's in a shared drive, right?)
- How to write a post for your organization. This can include things unique to your organization, like "we refer to our process as being on a journey" or "if we use acronyms, we always include the meaning in a parenthesis." It can also include words you never use or words you always use. It's good to include hashtags you use (if you do) or hashtags NOT to USE EVER.
- Ways to create graphics for a post. If you have a graphic designer, this is less important, but if your social media manager is the person who makes the graphics, this is a must. Include dos & don'ts for sourcing photographs and illustrations and your standards for alt-text. If you have an organizational Canva account, pre-loading your branding and templates and writing out how to access this will be helpful!
- The content distribution plan or flow. Do you have a specific type of post that only goes on Facebook? Do you cross-post your Reels to Twitter or LinkedIn? If those details are essential to your organization, include a section on content distribution flow.

1 SPELL IT OUT

(CONTINUED!)

If you've gotten this far, you'll notice what we have here – it's a manual for social media at your organization. Once you've finished it – congratulations! It can take time to do, but it can be essential to ensure your organization isn't caught unprepared. You've created something that not only helps you (the social media person) and your team, but the organization as a whole!

I recommend scheduling time at least once a year (ideally every six months) to update your manual to make sure it's up to date.

NOTES:

2 GET A BACKUP

Step Two: Find Your Backup

Once you've documented your processes, train one additional person in your organization to write, post, and schedule content, and manage comments or queries through social channels. This person can act as a backup if the social media manager can't be there in an emergency, OR this person can act as a relief if the social media manager needs time off. Ideally, this person is both.

Your mind may go to the PERFECT PERSON to act as your backup, or you could be looking at this step and going, "Ugh, there's no one."

Both reactions are typical, and finding someone may be easier if you think about these two things:

- Whether they are a TikTok Queen, run social channels as a volunteer for someone else, or if they are only on Instagram to share photos of their kids, you STILL HAVE TO TRAIN THEM ON YOUR ORGANIZATIONAL PROCESSES. Running a business account is different than posting to a personal account, and every organization is different, so you will need to train them. Taking the time to train someone is the difference between having a successful contingency plan & backup and crashing & burning.

- Be clear about expectations for the backup person. Work with the backup and their manager on when the backup person will step in. Since the backup person is ideally someone who can help during an emergency when the social person can't be there OR when the social person is taking a much-needed break, make sure to discuss & outline what each scenario looks like. Examples can include "I'll make sure to loop you into my vacation schedule, Jeff, and we'll meet a week before to make sure you know what needs to happen" and "In the event of an emergency, if I cannot make a post, Diane will contact you, Jeff and let you know that you need to take over for ____ amount of time."

It can be challenging to identify someone. I recommend always finding a backup who is employed full-time at your organization, plugged into what your organization does, and is a good communicator across the organization. Most of my clients use backups either in Development or Communications, but some use backups in the Administration/HR (our friends in HR who do job posts on LinkedIn are good at this stuff!).

It's also TEMPTING for nonprofits to use volunteers, but unless that person has proven reliable and understands the whole organization (and has a background in communications), I recommend against it. In some cases, I will act as backup for my clients so that you can look for a consultant or Virtual Assistant, but I only recommend this if they are already working with you.

2 GET A BACKUP

NOTES:

3 ACCESS IS KEY

Step Three: Administrative Access

Identify three people at your organization who can be attached to the accounts with admin access (like Facebook or LinkedIn) and provide them with access to your passwords for single-sign-on channels (like Twitter or TikTok) the email associated with your social program.

First, ensure that you have documented all your usernames & passwords for all applicable social media accounts and any supporting tools (Canva, Linktree, the email for your social accounts, etc.).

Then, make a list of people who would be appropriate to have access to the social channels that require admin access. Specifically, we want to look at your Facebook page/Meta business accounts and LinkedIn company pages and assign at least two to three trusted individuals with administrative access. This should include your backup person and ideally 1-2 other individuals.

To pick your other individuals, look at leadership in your organization. If you are small enough, consider your Executive Director and a second person in administration (Director of Communications or Director of Development, for example). If your organization is more extensive, you can look at the Leadership team or the second level down. The key is to pick people who are likely not to leave or to wreak havoc on your accounts if they do.*

Finally, the people who aren't your backup are there as a failsafe for the organization. They shouldn't be focused on posting or needing to post.

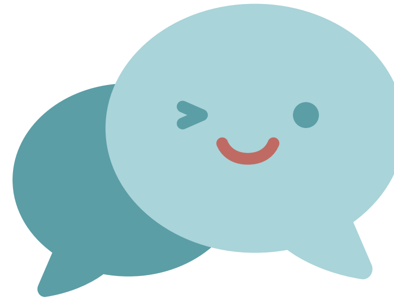
I've met with so many clients who lost access to their social accounts because a) only one person had access and b) they used a personal email address or the tech people deleted their email address, and by the time they engaged me to help them, there was no way to recover the account. This is what the extra administrative access individuals are for – organizational backup, not posting backup.

*If they leave, make sure part of their offboarding process involves removing them from admin access and adding a new person.

3 ACCESS IS KEY

NOTES:

The End.



So there you go—three very longwinded steps to creating a contingency plan. If you are overwhelmed, it's OK. Start slow. Step One is long for a reason – it both helps you get your ducks in a row and gives you time to think about who would be best to help you as a backup (Step Two) and who can be an organizational failsafe (Step Three).

Before diving into the actual documenting process, take a few minutes to write down a project plan for how you might attack creating your contingency plan. Look at your calendar – find a natural break in your year – and plan to work on the bulk of it then. I do NOT recommend trying to do this while in the middle of event season or annual giving season (to name two examples).

Like I said in the intro, you can always give me a yell. I'm more than happy to help – because I've been there!
Corrie

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