

# Social Media Communications Audit

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## A Guide To Understanding and Implementation

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*This document is intended to provide a description of what a social media audit is, how it can benefit your nonprofit organization and the tools you can use to complete an audit. It is intended to be valuable as a standalone tool that you can use to complete this task on your own or with the help of external consultation. The methodology and framework contained in these documents is based largely on resources developed by Julia Coffman for the Communications Consortium Media Center for the purposes of a traditional communications audit. The majority of the information is their property and our focus at NPower has been to update the content and modify the material for use related specifically to social media. This tool can be freely used and modified to meet your needs as you see fit, however we ask that the tool be shared freely and not re-purposed for sale as a product on its own.*

Nonprofit organizations should continuously be looking for ways to be more strategic in their social media efforts. Social Media activities should add up to more than a series of completed tasks and simply “doing.” Being strategic requires nonprofits be more deliberate, innovative, and savvy, and less reactive in their communications practices. Nonprofits are encouraged to regard social media as a component of, not separate from, overall communications. If the goal is to build sustainable, efficient and effective social media efforts, it is essential that it be integrate throughout the organization’s processes and systems.

While a lot of focus is put on the development of strategies and initiatives these alone do not address the larger question of sustainability.

- Will the organization actually follow through on the strategies and what, realistically, is their capacity to do so?
- What are the realities of competing needs and limited resources and how does this affect the capacity question?
- What are realistic expectations for what we can hope to accomplish given the current realities?
- If we wish to make changes to our systems how do we know where to start and how can we track progress?

Nonprofits need tools to better understand their current social media communications performance and capacity, and to gain an improved sense of what is possible in terms of developing efforts. A social media communication audit is one tool that can help to meet this need.

## **Social Media Communications Audits Defined**

A social media communications audit is a systematic assessment, either formal or informal, of an organization’s capacity for, or performance of, essential communications practices. It determines what is working well, what is not, and what might work better if adjustments are made.

Defined in this way, a social media communications audit has both evaluative and formative value. It is evaluative in that it provides a “snapshot” of where an organization currently stands in terms of its social media capacity or performance. It is formative in that it also points to areas in which the organization can strengthen its performance.

While social media audits are a relatively new practice, communications audits are a common practice and have been utilized for a number of years. They are more common among for-profits than nonprofits, and not familiar to most non-communications professionals. Audits are most often performed by external communications or evaluation experts, but can also be performed internally. The intention of this audit is to adapt a tried and true tool for this new area of communications to increase the ways organizations can become more strategic in their efforts.

This document has been developed as a resource for nonprofit organizations that want to better understand social media audits and the main steps involved. It can be used by nonprofits that either want to self-assess and perform their own audit, or might be looking to hire an external consultant. This document outlines five basic steps in a social media communications audit. The audit can be applied to an organization overall, or to a specific project or campaign within the organization. There are many approaches you can take to performing an audit; this document provides guidance for one of the possibilities.

## STEP ONE: Know Critical Social Media Communications Practices

Knowing the specific practices associated with social media communications is the first step to assessing an organization's performance and capacity. These are practices that every nonprofit trying to implement social media communications should be performing at some level, whether by a single individual or by many staff members throughout the organization.

The table on the next page identifies sixteen essential social media communications practices. They are grouped into four categories: 1) strategy, 2) implementation, 3) integration, and 4) support and alignment.

**Strategy** – Includes the core tasks of communications planning and strategy development.

**Implementation** – Includes practices most common to an organization with an active communications function.

**Integration** – Includes the core elements of integrating social media communications with other communication channels.

**Support** – Includes non-communications-specific practices within the organization that helps to ensure the communications function is successful.

The table also offers quality standards or criteria for each practice. They describe in brief what the practices should look like. This list has substantial value in the audit process. It can be used as a checklist to help determine if an organization is actually performing each social media communications practice. But more importantly, the audit process can reveal if quality criteria are being met and, if not, where improvements can be made in how the practice is performed.

## Essential Social Media Practices

### Social Media Practices

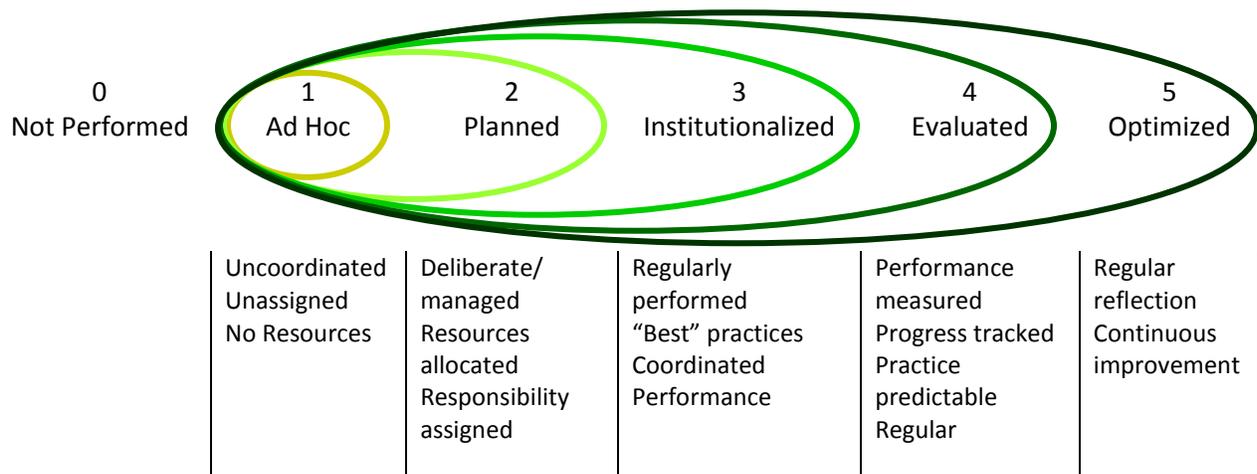
### Quality Criteria/Standards

	Social Media Practices	Quality Criteria/Standards
Strategy	Identify the vision	The communication vision is in line with, but distinctly different from, the mission of the organization
	Identify goals and outcomes	SMART goals and outcomes have been identified (Specific, Measurable, Achievable, Realistic, Timely)
	Select target audience	Specific audience groups are identified and may include key stakeholders and influencers
	Platform selection	Specific platforms have been identified and selected based on their ability to support goals
	Policies & procedures	Policies and procedures have been put in place to clarify process and define appropriate implementation
	Listening research	Research is done to learn what other organizations are doing and the content of the “conversation”
	Asset evaluation	An inventory of what you have to work with (staff, knowledge, etc.) and what “value” you add
Implementation	Tool selection	Platforms are selected based on their ability to support your goals and accessibility to your target audience
	Community development	Active steps are taken to understand and foster the development of your online communities
	Trained representatives	Appropriate training is provided to those people responsible for participating on behalf of your org
	Build valuable partnerships	Relationships have been made with internal and external stakeholders who align with your goals
	Monitor & evaluate	Activities are continuously monitored and evaluated for the purposes of accountability and improvement
Integration	Website	Strategic linkages and integration between social media efforts and your website
	Blog	Strategic linkages and between social media efforts and your blog
	Email marketing	Strategic linkages and integration between social media efforts and your email efforts
	Other Social Media Platforms	Strategic linkages and integration between all social media platforms
	Print materials	Strategic cross-promotion of social media efforts is taking place in printed materials
	Offline	Strategic cross-promotion of social media efforts is taking place in offline activities
Support	Support at the leadership level	Management understand and support social media as part of the overall communication strategy of the org
	Allocate sufficient resources	Financial and human resources are dedicated to supporting the social media efforts
	Involve staff at all levels	Social media is not seen as an isolated function; most if not all staff members have some knowledge and/or participation in communications efforts

## STEP TWO: Identify Possible Levels of Practice

To assess an organization on the practices in the previous table, it is important to have a gauge that helps to measure and illustrate where the organization currently stands in terms of its performance. That gauge is offered here in the form of a “practice maturity scale.”

The practice maturity scale offers a continuum of possible performance levels for any given practice. The figure below illustrates the scale’s five levels. Higher levels in the scale represent higher levels of organizational commitment to, integration of, and performance on the practice. Each practice may be classified as 1) ad hoc, 2) planned, 3) institutionalized, 4) evaluated, and 5) optimized.



During an audit and organization’s current performance on each social media communications practice can be assessed using this scale. It is important to understand the distinctions between the five levels.

### Level One: Ad Hoc

The communications practice is ad hoc and unorganized. Few, if any, staff and financial resources are dedicated to it. Success is based on the competence and efforts of one or two heroic individuals. Despite this chaotic environment, however the communications practice may be implemented successfully. But because it is uncoordinated, efforts are often inefficient and go over budget and schedule. Quality may also be variable because different people perform the practice over time.

### Level Two: Planned

The practice is planned and deliberate as opposed to being performed on a reactive or “as needed” basis. Resources are allocated to the practice, responsibilities are assigned, and the process is managed. The practice does not occur regularly, however, and may still be performed by one or two individuals.

### Level Three: Institutionalized

The practice is routine and part of the organization’s fabric. The organization has qualitatively determined the best way to approach the practice and has institutionalized it. Practices are known and coordinated within and outside the organization.

#### **Level Four: Evaluated**

The practice is evaluated and analyzed. Measures of performance and progress are collected and analyzed. Often a quantitative understanding of success is known and tracked, and the organization has a better ability to predict or estimate performance.

#### **Level Five: Optimized**

Because of its recognized importance to the organization, the practice is continuously reflected on and improvements incorporated.

Distinctions between levels one and two are based on the degree to which an organization is reactive and disorganized (level one) versus purposeful and proactive (level two). At level three, the practice is performed regularly, consistently across staff members, and has been performed enough that the organization has gained a certain level of proficiency at it. At level four, the organization has committed to tracking the practice for purposes of better understanding how to improve performance. The organization is monitoring the quality of the practice. Level five demonstrates an even higher level of organizational commitment to the practice, as the organization cares enough about it to learn and improve performance over time.

### **STEP THREE: Assess Current Performance and Capacity**

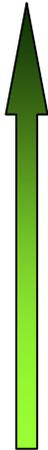
The main tasks for the third audit step are to collect data about communications practices and to use that data to make assessments about organizational performance and capacity. It involves actually using the scale described above to gauge where the organization stands on all essential social media communications practices. The figure on the next page illustrates in matrix form how this assessment might be structured. Note that this audit step could also involve looking at actual communications strategy content or materials and making assessments about their quality.

The matrix lays out the twenty-one communication practices along the bottom row, and the practice maturity scale vertically. Users fill in the box that best represents where on the scale the organization falls for each practice (an example of how this might look when filled out is provided later in this brief).

## Social Media Audit Matrix

The organization may be assessed either internally or by an outside expert on each of the social media practice areas using the five-level scale.

**Legend**       Current Level of Activity       Opportunity Gap



<b>5. Optimized</b>																					
<b>4. Evaluated</b>																					
<b>3. Institutionalized</b>																					
<b>2. Planned</b>																					
<b>1. Ad Hoc</b>																					
<b>0. Not Performed</b>																					
	Identify the vision	Identify goals and outcomes	Select target audience	Platform selection	Policies & procedures	Listening research	Asset evaluation	Tool selection	Community development	Trained representatives	Build valuable partnerships	Monitor & evaluate	Website	Blog	Email marketing	Other social media platforms	Print materials	Offline	Support at the leadership level	Allocate sufficient resources	Involve staff at all levels
	Strategy						Implementation					Integration				Support					

## Internal vs. External Assessment

It is important at this point to determine if assessments about organizational practices will be made internally or by outside experts. The advantages to doing it internally are that direct costs are likely to be lower and the process may become an engaging organizational exercise that builds communications capacity in and of itself. The advantages to using outside experts are their objectivity, time and availability, the knowledge they bring from other organizations for comparison purposes, and the credibility that may accompany their credentials and expertise.

## Potential Communications Audit Methods

Regardless of whether the audit is done internally or externally, a common set of methods can be used to gather data needed to make assessments about practices. Methods are described briefly below in the context of a communications audit and then followed by a table that compares them on time, cost, and information yield. It is helpful to note that while the use of one or more of these methods is recommended, it is also possible to conduct the social media communications audit informally by, for example, asking each staff member to give his or her own independent and subjective assessments based on existing knowledge and experience, or convening staff to make collective assessments.

- **Interviews** – Probably the most common audit method, interviews allow the person conducting the audit to better understand communications-related work processes. Interviews allow respondents to provide a rich qualitative account of how practices are performed and how the organization treats communications. Interviews can also be conducted with the organization’s external stakeholders or target audiences.
- **Surveys** – Surveys or questionnaires are the second most common audit method. They can be administered cheaply to all organizational staff within a short timeframe, and they allow for a standardization and comparison of responses.
- **Critical Incident Analysis** – Staff are asked to describe, through an interview or questionnaire, specific effective and ineffective experiences with communications. The purpose is to collect examples of experiences that staff find memorable in order to determine how communications practices are performed within situational contexts.
- **Network Analysis** – Network analysis has gained much popularity in recent years as a method for examining information flow, or the channels and relationships through which information is exchanged. It asks individuals who they communicate with and for what purpose. It reveals an organization’s communication structure, which may be very different from its organizational structure. It also reveals where blockages are occurring and possible routes that are currently untapped.
- **Participant Observation** – The individual conducting the audit participates in organizational activities involving communications in order to see how and when practices are performed.
- **Document Review** – Communications documents (publications, campaign materials, press releases, etc.) are reviewed to assess the development and targeting of materials as a communications practice.
- **Focus Groups** – Groups of five to fifteen people meet in a moderated discussion and respond to open-ended questions about communications practices and organizational capacity. Their main advantage is the group interaction that takes place as participants react to and build upon one another’s responses.

## Comparing Potential Audit Methods

Comparing Potential Audit Methods Method	Time to Nonprofit	Cost	Information Yield
<b>Interviews</b>	30-60 minutes each	Moderately expensive (time to conduct, analyze)	Qualitative, in-depth data
<b>Surveys</b>	20-30 minutes each	Moderately expensive	Standardized data
<b>Critical Incident Analysis</b>	20-30 minutes each	Inexpensive	Specific examples of practice/process flow
<b>Network Analysis</b>	20-30 minutes each	Expensive (analysis, software)	Process flow/interaction and integration
<b>Participant Observation</b>	Variable	Expensive (time)	Process flow
<b>Document Review</b>	None	Expensive (time)	Material, message evaluation
<b>Focus Groups</b>	1-2 hours	Moderately expensive (depends on number)	Qualitative in-depth data;

## **STEP FOUR: Identify Areas for Improvement**

Once the assessments are made, the next step is to identify areas in which the organization can improve. Note that nonprofit organizations are not expected to be a “level five” on all social media communications practices. Rather, the assessment of where the organization should be must be based on an accounting of the organization’s realistic capabilities with respect to communications. For example, it may not be reasonable to expect that all funding that comes into an organization will have dollars earmarked for social media communications. While an organization can make social media communications a priority and request specific resources for it, the outcome also depends on what funders are willing to support.

Completing the audit matrix will immediately provide the organization with areas for improvement. The following case study about a hypothetical nonprofit policy advocacy organization demonstrates how the social media communications audit can be used. The matrix has been filled in to represent this hypothetical organization’s performance on the twenty-one essential social media communications practices.

## Case Study Sample Organizational Assessment

5. Optimized																						
4. Evaluated																						
3. Institutionalized																						
2. Planned																						
1. Ad Hoc																						
0. Not Performed																						
	Vision	Goals	Audience	Platforms	Policies	Listening	Assets	Tools	Community	Training	Partnerships	Monitor	Website	Blog	Email	Other	Print	Offline	Support	Resources	Involve staff	
	Strategy							Implementation					Integration					Support				

**Legend**  Current Level of Activity  Opportunity Gap

**Current Performance and Capacity:** In the area of strategy, this hypothetical organization has a solid understanding of best practices and the need to set overarching goals. However, their lack of focus on evaluating audience and formalizing efforts is clear. As a result, this creates a sense of completeness in terms of planning but often times leaves unanswered questions regarding the value of social media for the organization. This then creates a sense of limited commitment to activities and an overall ad hoc use of staff and resources.

Regarding implementation, the organization’s lack of strategy development has left staff with an overall sense of feeling lost. The main focus has been to continue with a broadcast approach to messaging with little focus on strategic implementation of efforts. In addition, the lack of focus on a formal inventory of available assets has left it unclear as to which staff is best suited to complete which tasks.

Integration is the strongest of the four areas of focus. The historical understanding of metric analysis regarding the website has helped establish a foundation for a similar approach to how social media efforts are integrated. In addition, a similar focus on the e-newsletter has allowed for base level integration into this communication channel. Until a more strategic approach can be developed and the value better demonstrated, the organization has decided to hold off on creating a blog or using more than one social media platform.

In terms of support, executive leadership recognizes the rising need to better utilize social media, but has been slow to allocate appropriate resources to support it until the value can be better demonstrated. For similar reasons the role of social media for the organization at large has not been extended beyond the two staff who have been informally charged with carrying out these responsibilities.

**Areas for Improvement:** While the audit process has revealed a number of areas that could be improved, there are some clear priority areas. The cyclical relationship that seems to be holding back progress in most areas is a lack of identified value. Without clearly identified value most areas remain at an ad hoc level and few resources will be allocated to support these activities. Consequently, with activities being performed at only an ad hoc level there is little opportunity to find and demonstrate value.

The organization could gain the greatest value from prioritizing two areas: developing their strategy and building on the level evaluation of current efforts. A focus on growth in the areas of strategy and planning would give the organization a stronger sense of what value they are capable of gaining from their social media activities. This would result in a foundation to make more strategic efforts in the other areas. If there is no support provided for evaluation of current efforts there is little hope of seeing demonstrated value at any point, whether campaigns are successful or not.

For now, social media efforts will most likely remain focused on one platform and carried out by the two identified staff. As the value of these efforts become more clear the responsibility and integration across the organization should be further developed.

## **STEP FIVE: Refine Practice and Repeat the Process as Needed**

The social media communications audit should result in more than just an identification of areas for improvement. To maximize the chances that audit findings will be used and actual practice improved as a result, the audit should:

- Demonstrate through data how communications problems are causing problems in the present (as opposed to speculating about their future impact). At the same time, the audit should reinforce practices that are current organizational strengths.
- Generate specific recommendations for enhancement of communication practice. Data need to be linked to concrete actions.
- Make transparent the organizational benefits of adopting those actions; in addition to the weaknesses they are designed to address.
- Prioritize recommendations so organizations are not immobilized by the prospect of implementing them.

In terms of frequency, formal communications audits should be conducted about every five years. Informal audits on which organizations internally revisit their social media communications capacity and performance levels may be done more frequently. Audits should also be considered after an organization experiences a critical incident that might affect communications, such as a change in mission or leadership, or in the event of a crisis.

## **Conclusion**

As described here, social media communications audits are, at their core, an evaluation tool. Unlike most evaluation tools or practices, however, they do not focus on the results or outcomes of an organization's communications practices after they are implemented or among their target audiences. Rather, they focus on the organization itself, its practice and capacity, and how the organization has positioned the communications function. Nonprofit organizations often overlook this type of assessment as a possibility when asked to evaluate their communications strategies or activities. Experiencing the social media communications audit process, using the approach described here or another designed toward a similar end, can be a critical part of an organization's progression toward more strategic and, ultimately, more effective social media communications.