

**Pioneers in Justice
Capacity Building Grants
Social Media/Technology Benchmarks**

Background & Purpose

The leading edge of social change is increasingly about bringing people together in imaginative and courageous ways. Collaboration, coordination and working in networks are becoming the norm, as nonprofits across sectors work to move the needle on today's most pressing problems. As a result, leaders and organizations are taking increasing advantage of technology's ability to facilitate and expand their impact. In particular, social media and other online vehicles are rapidly becoming 'tools of the day', delivering fundamentally new ways of communicating, organizing and taking action for social change.

The Levi Strauss Foundation created the Pioneers in Justice initiative to support dynamic next-generation leaders in the social justice sector and help them use the power of networks and social media to advance their missions and movements. ZeroDivide, a San Francisco-based nonprofit fostering technology adoption in underserved communities, is the Foundation's technical partner for the social media components of Pioneers in Justice.

The following chart provides a set of benchmarks designed to help the Pioneers in Justice leaders determine progress in building social media and technology capacity – moving from theory to practice to measurement and sustainability. The benchmarks have been developed by ZeroDivide based on social media and technology best practices for nonprofits.

The benchmarks are intended to be a helpful tool to assist the Pioneers in Justice organizations, Levi Strauss Foundation and ZeroDivide with common criteria to measure progress and determine next steps for individual organizations and the initiative as a whole. Specifically, the chart is used in the annual capacity building grant process and provides a prevailing standard for accountability in meeting the Pioneers in Justice grant requirements.

Structure & Baseline

The chart focuses on four phases of social media and technology capacity – exploration, learning & action, measurement & systems, and sustainability – that align with information, tools and skills gained by the Pioneers and staff through the Pioneers in Justice initiative. While it would be optimal for an organization to meet the benchmarks in each phase before proceeding to the next, we recognize that capacity building is typically not a linear process and that organizations may proceed at a different pace depending on agency priorities and resources. For example, an organization may be in Phase Four with regard to its technology infrastructure, but still in Phase Three on social media integration.

Overall, the benchmarks are meant to provide a guide or roadmap for social media capacity building; however, there is also a set of key baselines that would be achieved by the Pioneers organizations by the three-year milestone of the initiative. These baselines are as follows:

- Technology and web site capacity for social media and online communications are in place and an upgrade cycle is established.
- A social media policy is adopted and staff and board are trained in its use and adhering to it.
- Activity on the major social media channels (e.g., Facebook; Twitter; YouTube) is integrated into communication plans.
- Social media metrics are established and data are collected and analyzed on a regular basis to inform strategic use of these tools.

- Staff across the organizations has received training in the social media skills and tools and is using it as part of programmatic activities.
- A social media pilot or campaign has been conducted and lessons learned are informing new projects.
- Staff demonstrates comfort in participating in social media activities directly related to the organization's goals and outcomes.

Implementation –Capacity Building Grants

The Pioneers in Justice initiative allocates annual capacity building grants to foster organizational, staff and program expertise and development around the integration of social media tools and strategies. In Year 1, the grants focused on helping the Pioneers organizations establish the basic infrastructure, policy and staff capacity for social media work. In Year 2, the grants built on the first year of funding to enable the Pioneers to take the next steps to move from awareness to practice, along a continuum of incremental growth and experimentation with social media execution. In Year 3, the grants focused on measurement and systems in building social media and technology capacity to help drive strategy and results.

This year, the benchmarks chart has been expanded to reflect the next stage of progression and final stage of Pioneers in Justice social media/technology capacity building: establishing processes and internal capacity to ensure social media and technology sustainability. In developing the Years 4-5 Capacity Building Grant application, the Pioneers' organizations should:

- Take note of the specific benchmarks for each phase;
- Determine that the organization has achieved the baselines outlined above;
- Assess organizational and staff capabilities, resources and progress against the benchmarks; and
- (Based on this assessment) Identify the specific capacity building goals, activities and tailored budget to prioritize in the grant application.

**Pioneers in Justice Capacity Building Grants
Social Media/Technology Benchmarks**

Area	Phase One: Exploration	Phase Two: Learning & Action	Phase Three: Measurement & Systems	Phase Four: Sustainability
1.0 Infrastructure				
1.1 Hardware, Software & Applications	<ul style="list-style-type: none"> ● Technology hardware and software assessed to assure support for social media activities. ● New hardware and software purchases made to support social media activities. <ul style="list-style-type: none"> ○ Hardware examples: servers, laptops, mobile devices, still and video cameras ○ Software/apps: cloud-based services, collaborative tools such as DropBox, Google apps, etc. 	<ul style="list-style-type: none"> ● Technology hardware and software upgrade cycle plan in place. ● Exploration of cloud-based services: <ul style="list-style-type: none"> ○ Document sharing: Google Docs, DropBox, Egnyte ○ Collaborative Tools: Base Camp, PIJ online resource ○ Email: Gmail ○ Back Up Services: Time machine 	<ul style="list-style-type: none"> ● Technology hardware and software upgrade cycle included in annual budget and planning process. ● Experiment with cloud-based services: <ul style="list-style-type: none"> ○ Document sharing: Google Docs, DropBox, Egnyte ○ Collaborative Tools: Base Camp, PIJ online resource ○ Email: Gmail ○ Back Up Services: Time machine 	<ul style="list-style-type: none"> ● Technology plan (including hardware, software & applications, and other components below) is integrated into organizational strategic plan. ● Technology plan is reviewed and updated on an annual basis.
1.2 Broadband Connection	<ul style="list-style-type: none"> ● Analysis of current Broadband (high speed internet) services including upload and download speeds. ● Explored options for less expensive, high speed broadband. 	<ul style="list-style-type: none"> ● Broadband speed matches need for social media activities. 	<ul style="list-style-type: none"> ● Broadband speed matches need for social media activities. ● Consider mobile broadband needs, and explore potential mobile broadband options (if necessary for program and outreach. Examples: Verizon, AT&T, Clear Mobile broadband) 	<ul style="list-style-type: none"> ● Review broadband options including mobile broadband for program and outreach as part of annual review of technology plan.
1.3 Website/ Blogs	<ul style="list-style-type: none"> ● Website infrastructure revamped to incorporate social media tools/links. 	<ul style="list-style-type: none"> ● Social media channels pushing traffic to website. ● Social media tools fully integrated into website. ● Metrics developed for both social media channels and web presence. 	<ul style="list-style-type: none"> ● Establish system for regularly tracking and measuring website impact. 	<ul style="list-style-type: none"> ● Senior management and communications staff regularly reviews data on website to determined impact of social media and web presence. <ul style="list-style-type: none"> ○ Communications Staff monthly ○ Senior Staff quarterly

1.4	Database	<ul style="list-style-type: none"> • CRM database system is in place, or • Plan to migrate to new database system or consolidate existing database(s) in place. 	<ul style="list-style-type: none"> • Functioning CRM database system in active use. Examples: Convio, Civic CRM, Donor Tools, Salesforce. • Organization capturing relevant social media contact data 	<ul style="list-style-type: none"> • Integrate social media efforts to CRM database (i.e. use tools to link constituents to Twitter, Linked-in, etc. to CRM). 	<ul style="list-style-type: none"> • Data derived from CRM database is regularly reviewed and used in social media strategy and tactics development. • CRM database used to determine levels of engagement by constituents. • Use social data from CRM for segmentation including better identification of target audiences, influencers and otherwise increasing understanding of audiences.
2.0	Social Media Integration				
2.1	Social Media Policy	<ul style="list-style-type: none"> • Social media policy completed, officially adopted, and distributed to all staff. 	<ul style="list-style-type: none"> • Social media policy socialized within organization (all staff understand and adhering to policy). • Staff providing feedback on policy. 	<ul style="list-style-type: none"> • Social media policy well established within organizational culture. • Conducted at least one review of social media policy with staff and made revisions to policy (if necessary). 	<ul style="list-style-type: none"> • Social media policy reviewed annually. • Revisions are communicated to staff and enforced.
2.2	Integration w/ Communications Plan	<ul style="list-style-type: none"> • Social media incorporated into communications activities. 	<ul style="list-style-type: none"> • Communications plan in place which includes strategic and tactical use of social media. 	<ul style="list-style-type: none"> • Lessons learned from pilots or campaigns integrated into overall social media component of communications plan. 	<ul style="list-style-type: none"> • Communications plan with social media components reviewed and updated annually. • Any revisions are communicated to staff.
2.3	Pilots and/or Campaigns	<ul style="list-style-type: none"> • Initiative pilot use of social media (crawl – walk). 	<ul style="list-style-type: none"> • Social media pilots or campaign fully employed. • Metrics and learning loops established to learn from these pilots or campaigns. 	<ul style="list-style-type: none"> • Pilot or campaign completed, lessons learned collected and included in overall organizational social media plan & other existing projects or campaigns. • Establish new campaigns or projects. • Explore emerging social media platforms (e.g. Pinterest: How 	<ul style="list-style-type: none"> • Implementing new social media campaigns or efforts based on lessons learned. • Process for regularly reviewing lessons learned from campaigns and integrating lessons into new campaign development in place, such as: <ul style="list-style-type: none"> ○ Team or organization

			are other orgs using?)	<p>wide debriefs or reflection sessions;</p> <ul style="list-style-type: none"> ○ Documenting lessons learned and sharing organizational wide; and ○ Tracking and analyzing data from campaigns.
2.4 Outreach	<ul style="list-style-type: none"> ● Identify new audiences/constituencies to connect with via social media. ● Understand how those audiences use social media. 	<ul style="list-style-type: none"> ● Begin experimenting with uses of social media to engage new audiences/constituencies. ● Increase outreach to new audiences/constituencies using new media. 	<ul style="list-style-type: none"> ● Outreach strategy/tactics includes engagement of “influencers” (plan recognizes value of networks of individuals). ● Regularly tracking and measuring impact of social media on outreach efforts. ● Have a good sense of what is working and what is not working. ● Revise outreach plan based on learning. 	<ul style="list-style-type: none"> ● Formal plan in place to engage “influencers” including a target list of influencers and desired engagement levels. ● Reviewing data collected on outreach efforts to inform current and future outreach and engagement efforts ● Sharing data on “influencer” engagement with relevant program staff.
2.5 Measurement	<ul style="list-style-type: none"> ● Using basic social media measurements (i.e. number of Facebook fans, Twitter followers). ● Identify more strategic types of measures linked to communications, program or advocacy goals. Metric Examples: <ul style="list-style-type: none"> ○ Goal: Increase outreach to younger audiences; Metric: number of new followers on twitter under 30 ○ Goal: Increase number of scope of legal training through videos and webinars; Metric: number of 	<ul style="list-style-type: none"> ● Track identified strategic metrics on at least a weekly basis (metrics identified in year 1). ● Develop dashboard to track and display metrics. 	<ul style="list-style-type: none"> ● Review what is working and not working with weekly tracking of metrics. ● Determine metrics to track on a long-term basis (based on experience to date) with a goal of establishing organization-wide internal systems to evaluate metrics and modify measurement plan (learning loops). ● Share dashboard with staff, board of directors and other relevant audiences. 	<ul style="list-style-type: none"> ● System and processes to evaluate metrics and apply analysis to modify measurement plan in place and used regularly. ● Dashboard of metrics results reviewed regularly by senior management, staff and board. ● Measurements / goals updated / shifted in alignment with the communications plan and outreach efforts.

	<p>videos & webinars products, number of views/video or participants/webinar.</p> <ul style="list-style-type: none"> ○ Increase visibility of org in blogging community; Metric: number of times org is mentioned on a particular blog. 			
3.0 Staff Capacity				
3.1	<ul style="list-style-type: none"> ● Staff role in using social media on behalf of organizations is clear (refer to social media policy). ● Baseline staff skills assessment taken. ● Identify key areas for staff skill training (e.g. webinar training for lawyers on staff). ● Staff training on social media tools and skills. 	<ul style="list-style-type: none"> ● Increase in staff use of social media as part of organizational programs/activities. ● Continued staff training on social media tools and skills, for example training on collaboration tools such as Google apps, digital media (videos and podcasts) production and distribution, crowdsourcing tools, new networking tools such as Google Plus. ● Staff develop expertise with a specific type of social media. 	<ul style="list-style-type: none"> ● Continued progress in staff use of social media as part of organizational programs/activities. ● Identify and provide new levels of training for staff on social media. ● Establish system to measure staff impact via social media (e.g. number/type of twitter followers. Note: related to staff official social media activity, rather than personal use). ● Increase staff “interactivity” on social media (e.g. not just tweeting, but engaging with other twitters). 	<ul style="list-style-type: none"> ● Staff training incorporated into technology and communications plans. ● System to measure staff participation in social media established and review by staff on a regular basis. ● Staff receives feedback and coaching from communications staff on social media efforts.
4.0 Culture Change				
4.1	<ul style="list-style-type: none"> ● Leadership and staff of organization embrace values and principles of social media: <ul style="list-style-type: none"> ○ Transparency ○ Interactive, two-way communication ○ Real-time action ○ Participatory ○ Decentralized 	<ul style="list-style-type: none"> ● Increase number of staff participating in social media activities directly related to organization’s goals and outcomes. ● Board education on social media’s relationship to organizational goals and outcomes. 	<ul style="list-style-type: none"> ● Pioneers and staff regularly use PIJ Online Resource to get information, share ideas, and engage with colleagues across organizations. ● Pioneer establish social media “voice” through at least one social media venue (e.g. twitter, blogging, podcasting) ● Staff demonstrates comfort in 	<ul style="list-style-type: none"> ● Job descriptions reflect participation in social media for most staff. ● New staff introduced to social media responsibilities, social media policy as part of orientation process. ● Training available to new staff.

	<ul style="list-style-type: none">• Social media policy development involves staff.• Identifying key staff roles and incorporating into job description.		participating in social media activities directly related to organization's goals and outcomes.	<ul style="list-style-type: none">• Board members become brand ambassadors for organization.• Brand ambassador / internal social mentorship initiatives (across staff / exec / board).
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