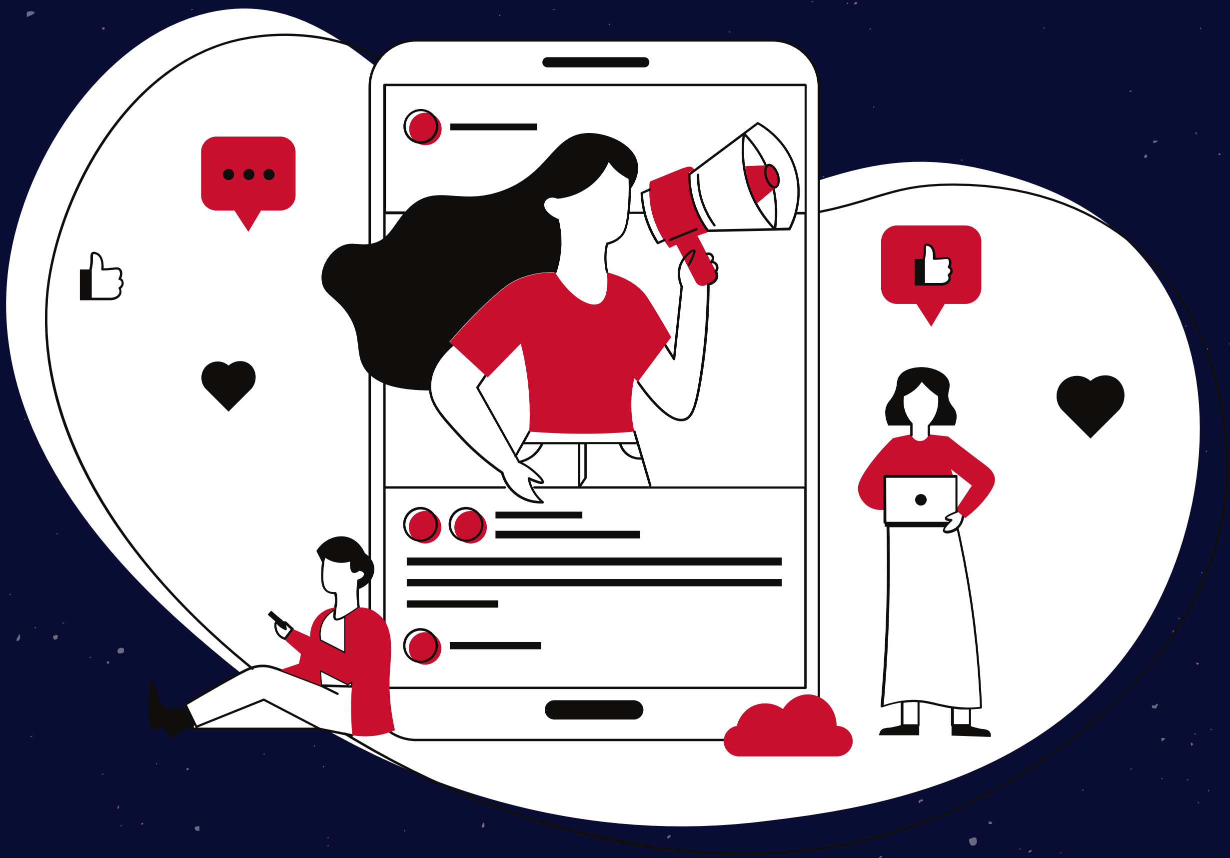

SHARING THE RIGHT MESSAGE

DIGITAL COMMUNICATION POLICIES GUIDE FOR NONPROFITS

keela

IMAGINE CANADA

We know nonprofit professionals often wear many hats. Whether new or established, your organization may not have a Human Resources department or even a dedicated HR staff member on the team. Yet, developing organizational policies ahead of time allows your organization to plan for its short-term needs and mitigate long-term risks.

While there are a multitude of policies your organization needs to be successful, this guide will get you started on the right foot for creating comprehensive policies around your digital communications and fundraising efforts. As more of our work is done online, there is an increasing need for the creation of these digital policies to protect both your organization and your employees.

For more information on organization and management policies, Imagine Canada's Standards Program offers a rigorous accreditation process tailored for all Canadian charities and nonprofits. The program outlines over 70 standards aimed at creating accountability and resilience in all levels of operations and governance.

WHAT DO YOU NEED TO GET STARTED?

Getting started on any organizational policy and procedure is two-fold. You'll need to evaluate your organization’s needs individually and consider the direction you want your nonprofit to go as your team grows. Policy is ever-changing, and you will likely adjust your policies as you go.

However, deciding the type of workplace culture you want to work towards is an important starting point for any policy. This is especially important for policies surrounding communications, as who you are in the public eye is an extension of that culture.

Getting Started:

- Social Media Policy
- Fundraising Policy
- Email Marketing Policy
- How to best communicate these policies to your team

SOCIAL MEDIA POLICY

Use this worksheet to outline your organization’s needs and develop a cohesive social media policy. A social media policy should outline how your organization and its employees conduct themselves online.

Developing a social media policy can be an ambiguous task.

You need to walk the fine line between ensuring your organization is represented accurately online but do so in a way that doesn’t discourage your staff from engaging with your organization's social media or promoting it on their pages.

Your social media policy should ideally encourage your staff and volunteers to engage respectfully, inclusively, and enthusiastically! Additionally, your policies can be communicated to volunteers, corporate sponsors, donors, and other affiliated community organizations.

Before creating a policy, it is always a good idea to connect with your staff to discuss any crucial needs from your team and address any questions or concerns about a policy of this nature. This can ensure your team feels heard and respected in the policy development and creates a level of buy-in to the final policy.

So, where do you begin?

The best place to start is by clarifying your official social media accounts and having those links available to your team. This gives your staff clarity and prevents them from promoting incorrect or fake accounts.

By developing a short toolkit for your staff, they will be confident they have the resources to promote your organization and engage with your stakeholders online appropriately.

This should include:

- ☑ Links to all your active social media accounts
- ☑ Login details
- ☑ Account roles and staff responsibilities
- ☑ Any branded hashtags you consistently use
- ☑ Key brand strategies such as color pallets, language, and tone

It is vital to consider transparency online. Suppose your staff promote or comment on your organization's affairs from their personal account. In that case, it is always a good idea to have their affiliation with your organization listed on their profile. If they are sharing personal opinions online, they can, for example, also add "All opinions expressed are my own" to their biographies.

The next piece to consider is privacy

It is essential to develop a policy about what can or can't be disclosed online. A good rule of thumb is to avoid sharing confidential information, including information about coworkers, private communications, financial disclosures, or upcoming news that's yet to be released.

This can also be referred to as an "Inside Voice, Outside Voice" policy, meaning the distinction between private organizational information vs public, ready to share information. Having clear boundaries around the disclosure of information online will only serve to benefit your staff and organization.

General Do's and Don'ts on Social Media

- ✅ DO list the organization as your employer in your social media bio (if you wish to)
- ✅ DO share posts, events, and stories
- ✅ DO express your own opinion. Just make sure it's clear you're not speaking on behalf of the organization
- ✅ DO report harassment you've experienced or noticed.
- ❌ DON'T engage publicly with negative coverage or comments; take the conversation to a private message instead.
- ❌ DON'T engage with others online in an inappropriate way

Ready to write your policy? Here are the questions to ask.

- What are the needs and concerns of your staff members?
- How can this be communicated to your team?
- What official accounts and organizational branding is important to communicate with your team?
- What is your organization's stance on transparency? How will you ensure you are clear and open online with staff using their own accounts?
- What is and isn’t okay for employees to disclose online?

Cyber Security Checklist:

- Limit the personal and professional information you share
- Choose strong passwords! For example, **\ne2o.P1/** is a stronger password than **impact123**
- Use a different password for every account
- Use two-factor (or multi-factor) authentication to log in to social networks
- Use personal credentials for personal social media accounts
- Only activate geolocation services on apps when necessary
- Practice safe browsing
- Make sure your Internet connection is secure
- Do not download or click on suspicious content

FUNDRAISING POLICY

When formalizing your organization's fundraising policy, it's essential to consider your objective. Meaning, why is this policy necessary, and what do you hope to convey through it.

The most important aspect of a fundraising policy is trust and transparency. Your organization must be accountable to donors, stakeholders, government agencies, and future patrons to succeed. The key to establishing trust is keeping to set guidelines for handling donations and other practices. Communicating your objective as to why this policy was created will help establish trust and provide accountability to your team members.

A fundraising policy also tells potential donors what types of gifts you accept and what is required of your team before you say yes to a potential donation. It can also provide clarity and structure to your stewardship practices, including what types of gifts earn what type of recognition. Ironing out these details ahead of time improves consistency and provides a framework that is easy for oncoming staff to replicate.

So, where do you begin?

There are a few different elements to creating your fundraising policy, but your privacy and security commitments are most important as you're handling your donors' financial data. Your fundraising policy is a great place to create your rulebook to ensure your staff and donors are protected and outlines how anyone handling this data should work to protect it.

To do this, you'll need to establish:

- ☑ What your confidentiality policy will be
- ☑ How old documents will be protected or filed
- ☑ How credit cards and other sensitive financial data will be protected for your donors

Next, you'll want to consider formalizing your process for accepting donations. What types of donations will you or won't you accept?

For example, will your organization accept physical goods and services as a donation? If yes, what kind? Formalizing these requirements allows your organization to receive the types of donations you need while also respecting your donors' time and contributions.

The MS Society of Canada's Gift Acceptance Policy details exactly what types of gifts they are willing to accept, how certain gifts such as publicly-traded securities, property, and other types of investments must be handled. On the other side of the coin, this policy also outlines what the MS Society of Canada **will not** accept. This policy clearly reflects the organization's values, and both donors and stakeholders will have a clear understanding of the who, what, how, where and why's of gifts to the foundation.

Something to consider in this realm is your policy on fundraising events. Are there any types of events that would not be acceptable for your organization to organize? Is there a minimum income to expense ratio required to continue certain events? Will volunteer hours be accounted for in the total cost and budget of the event?

In this policy, it is also helpful to outline due-diligence for having in-person fundraising events. What types of permits are required, licensing, etc. If you've switched your strategy to facilitate virtual events, it's essential to brush up on any cybersecurity requirements to ensure your attendees' privacy and security needs are upheld.

Finally, it is important to have this reviewed by your organization's board of directors, to add credibility and accountability to your policy.

Ready to write your policy? Here are the questions to ask.

- How can you make sure you uphold the Donor Bill of Rights in your policy?
- What types of donations are acceptable for your organization?
- What types of donations can you not accept? For example, many organizations avoid "tricky" donations from tobacco, marijuana, alcohol, and mining companies).
- What types of security measures will be put in place to ensure donor privacy and the safe handling of financial data?
- What types of fundraising activities will your organization want to engage with? Are there any considerations that need to be outlined in your policy?

Additional resources related to fundraising policies and practices are available through Imagine Canada's Standards Program.

EMAIL MARKETING POLICY

Connecting via email with donors and volunteers can significantly impact and engage those who may not be in regular contact with your organization.

Email marketing is by far one of the most effective tools in your donor toolkit, so developing a solid policy is vital to ensure your communication is consistent and in line with your organization's values.

Additionally, it's imperative to comply with Canadian Anti-Spam Laws (CASL) when sending out email blasts. You will need to understand how these laws will influence your policy development and email templates!

So, where do you begin?

The first step for developing your policy should be to include all the pieces required of CASL.

These pieces include:

- Your name and/or company name
- Your physical address
- Your contact information
- The ability to unsubscribe from the mailing list

Once you have the correct information for your organization included in your policy, you'll need to review the different types of consent for email marketing.

Implied Consent means you have gathered this contact information and have added these individuals to a mailing list due to a specific activity.
Expressed Consent means that you have added this individual to a mailing list because they specifically asked to be included on this list.

To be compliant with CASL, you will **need expressed consent.** You can have an option on your website or donor pages to opt-in to an email list or send an email to your current email recipients asking them to opt-in to your mailing list. For those who reply positively, add them into a separate list - and use this one moving forward.

Lastly, you'll need to keep Proof of Consent on file for compliance. You can export the list of email list opt-ins to keep within your organization.

The next piece to consider is privacy

You'll need to consider your organization's privacy policy. It should be clearly defined and made available to donors. This should clearly outline how their email will be used and for what purposes.

Start figuring out your internal process

In general, processes are not typically part of policies themselves, however, it is useful to develop them and document them with your staff. For example; you'll want to define your email marketing and lists' mechanics.

Will you have a dedicated email address and inbox for your emails? If yes, who will be responsible for responding and monitoring that inbox? Alternatively, would you prefer to have a dedicated email that is automatically forwarded to your team members, and if yes, which members?

You'll also want to review the type of language used for email lists. Will they be personalized, friendly, professional, etc.? Deciding on a tone and language guide for your email lists can help create a cohesive standard for your email communications.

Lastly, you'll want to note down the review process for emails sent out to donors. Who will be responsible for proofreading, editing, and who will give the final approval before sending it out?

HOW TO BEST COMMUNICATE THESE POLICIES TO YOUR TEAM

You've now created a set of policies, and you're ready to go! What's next for making sure your employees understand them?

The first piece will be to inform your employees upfront. This can be on an annual basis if you are reviewing/changing policies, including taking the time to explain to your staff members why these policies were created and what you hope to achieve by including them in your organization's structure.

If this is your first time introducing formal policies to your organization, it's worth having a team meeting to discuss the policies and their objectives.

It is also imperative to highlight how your policies may impact employees or change their behaviour in the organization.

The next step is to ask for feedback. Asking for feedback from your staff members will help create a level of employee buy-in to your policies and highlight any oversights or blind-spots when drafting your initial policy. This will also be a good test of how clear/easy-to-understand your policies are to your team and provide you with any clarifying items to include.

After taking in this feedback and making any relevant changes (and having your board review these changes if needed), you can introduce the final product to your team. You can review the final product together as a team, reinforce its importance and why it was created.

Many policies will be living documents subject to change, so having an avenue for employees to provide feedback on how policies might be improved will benefit your organization and the staff members who work there.

Lastly, you'll want to have a section for employees to sign off on the policies, signifying that they understand them and are giving consent to be held to the policies provided. Copies of this document can be stored in the employee's HR file and completed when they are hired or if changes are made to any of the policies.

How do I ensure my employees can access these policies?

Incorporating policy review into all new employees' training will help ensure each employee has access to your organization's relevant policy information. Additionally, if you do not have a dedicated HR manager, designate a point person who understands the material and can clearly communicate it to your staff.

This person will be the go-to person for questions and concerns about your policy. Implementing ongoing training or review of your policies can be beneficial and can be done in team sessions or individually.

Finally, make your policy guide or employee handbook available to all employees, either via hardcopy or digitally (such as a PDF stored in Google Drive, Dropbox, shared network, or stored within your CRM.) This ensures everyone on your team has access to your organization's most relevant, updated information.

If you're ready to take your organization a step further, refer to Imagine Canada's Standards Program, and start building transparency, accountability and clarity into each facet of your operations.

DOWNLOAD THE FREE HANDBOOK