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# Social by Social

A practical guide to using new technologies to deliver social impact

by **Andy Gibson, Nigel Courtney, Amy Sample Ward, David Wilcox and Professor Clive Holtham**

## The shape of things to come

Or ‘what’s this all about anyway?’

by **ANDY GIBSON**

## This is a book about the social uses of technology

Not technology for the sake of it, but how to take these trendy new tools and use them for things that really matter

We believe that the power of the internet, mobile phones, digital filmmaking and web software can be used to revitalise our communities, promote democracy, deliver public services and mobilise us for collective action.

The **media** has already been transformed. In 1937 it took 10 days for colour photographs of the Hindenburg disaster to reach the public. Now the Metropolitan police are being called to account <sup>[1]</sup> by demonstrators using videos shot on their mobile phones, and mainstream journalists increasingly look to bloggers <sup>[2]</sup> and citizen journalists <sup>[3]</sup> to break new stories.

**Marketing** has also changed. Since the Cluetrain Manifesto <sup>[4]</sup> declared “markets are conversations” in 1999, companies are getting smarter about talking ‘with’ customers rather than ‘to’ them. Sites like Dell’s Ideastorm <sup>[5]</sup> use the internet to help customers develop products they want to buy, whilst Skittles <sup>[6]</sup> turned their entire homepage into a Twitter <sup>[7]</sup> search for conversations about their product. Dell claim to have made over \$1million <sup>[8]</sup> from their Twitter sales alerts alone.

**Corporations** are changing too: the way they work internally, and how they engage with

the wider world. The [BBC](#) <sup>[9]</sup>, [IBM](#) <sup>[10]</sup> and [General Electric](#) <sup>[11]</sup> are using [web 2.0](#) <sup>[2]</sup> tools to transform their internal knowledge management. [Rate a Partner](#) <sup>[12]</sup> is ruffling feathers at dozens of global law firms, Ernst & Young is using [Facebook](#) <sup>[7]</sup> to recruit the best young graduates, and broadband provider [PlusNet](#) <sup>[13]</sup> even lets its customers to do its support work for it via its online support [forums](#). <sup>[2]</sup>

So the question now is, how will these technologies change our **society**, our charities, our public services, our democracy? The [Obama campaign](#) <sup>[14]</sup> used social media to engage the public in spreading the word and organising local groups – but there's much more to it than campaigning. The work of [MySociety](#) <sup>[15]</sup> and sites like [FarmSubsidy.org](#) <sup>[16]</sup> are showing the huge organising and mobilising powers of the internet, and [Mumsnet](#) <sup>[17]</sup> is supporting thousands of parents simply by connecting them together. The tools become quicker and cheaper every day.: the [Companies House website](#) <sup>[18]</sup> is still 'closed' between midnight and 7am, but a group of hackers at [Rewired State](#) <sup>[19]</sup> built [a new 24/7 version](#) <sup>[20]</sup> in one weekend. It's not just hackers either: even [the Queen herself](#) <sup>[21]</sup> is on [YouTube](#) <sup>[7]</sup> these days.

It's time for the social sector to catch up. There is a new social infrastructure being built, and we can use it to make the world better. This book explains how to do it, and what might happen if we do.

## You what?

**It's all about communication.** Communication is fundamental to our society, and to creating change in it. We all need to get and share information, start conversations, tell stories, work together, promote our ideas, influence others. Good communication can change lives, stop wars and elect presidents; bad communication can start arguments, waste resources and even cost lives.

Much of our most important and effective communication doesn't involve **technology**. We talk, observe, play games, develop relationships face-to-face through our senses, without even thinking about it. Technology extends our reach, via print, film, radio, television, photography, phone, e-mail and the internet, but it can't change our basic human nature. Communication comes in all shapes and sizes, but its basic social purpose stays the same.

This handbook describes the use of a particular strand of communications technologies that have emerged over the past five years. It includes [web 2.0](#) <sup>[2]</sup> and [social media](#), <sup>[2]</sup> but also the rise of low-cost digital filmmaking, [virtual](#) <sup>[2]</sup> [worlds](#) <sup>[2]</sup>, mobile technologies and the many new self-organising [offline](#) <sup>[2]</sup> techniques that mirror the developments in the virtual space. None of these things are new. What makes them significant is that they are now, in the UK at least, significantly established in our society.

And what makes them important is that they place more power in the hands of individuals, and in doing so enable two-way communication – real, human **conversations**. They make it easier than ever for organisations and governments to talk to the people; but they also let the

people talk back, and talk to each other. And not simply in writing, but through video, music, voice, photographs, animation and even in virtual worlds.

Conversations are scarier and more **unpredictable** than 'pushing' messages to a passive audience. If your audience can talk back, you have less control of the messages and ideas being communicated; your audience suddenly has as much power as you do. You can't plan a conversation. But if you really want to change the world, you have to change the conversations between people – and once you understand that, and how the smart use of technology can give you a voice in these conversations, then things become very interesting indeed.

## So what?

Well, whether we choose to acknowledge it or not, we are all living at a time of unprecedented social, economic and environmental change. Climate change, an aging population, the economic crisis and cultural and religious tensions are acting to destabilise and reshape our world in ways we cannot predict or control.

The **challenges** to our communities, our public services, our businesses, ourselves, could be overwhelming. In the UK, the homogenous society once served by the BBC News and the NHS has grown into a complex, multicultural, multilingual network of overlapping communities served by a thousand news and entertainment sources, but still cared for by the same centralised NHS. Top-down hierarchies are becoming inefficient and ineffective, failing to meet the increasingly complex and nuanced demands of modern society. Even if we could provide everything our society needs centrally, we would still struggle to pay for it. And meanwhile, the global climate crisis is turning us more than ever into one planet with shared responsibilities to each other. Something has to give.

Technology isn't a panacea, but it can make our existing activities cheaper and more accessible, and it can also allow us to do new things that were not previously possible. Modern communications technologies are doing both, giving us **new tools and new platforms** to develop ideas, deliver services, organise activities, circulate information, engage people, establish accountability, solve problems and share best practice. Already they have the potential to radically alter how the state, the third sector and our local communities serve the well-being of society.

Here are a few examples of how better communication can help improve civil society:

- **Personalisation:** enabling individuals to design public services and do things for themselves
- **Efficiency:** making the effort and resources we spend go further and do more
- **Inclusion:** lowering and circumnavigating the barriers to information, and participation
- **Transparency:** making information and decision-making processes open and trustworthy

And the potential uses of these technologies are only just beginning to be explored.

## Yes, but...

Surely if these technologies had all the answers, we'd all be using them by now? Well, yes and no. They are still relatively new, and they are growing at remarkable speed compared to previous technological advances. But there are still significant reasons why these technologies have not yet come to dominate the mainstream of social and political activity.

### Access

Internet and mobile phone access has become truly mainstream in recent years, but there are still millions of people without easy access to - or understanding of - the brave new digital world. Whilst Amazon and eBay are accepted features of household purchasing patterns, the expectation that a similar tool might be an aspect of healthcare choices or a child's education is not yet a reality. For practical innovations to have impact they must scale and create a user-base; and if they are to take the place of existing services they must be accessible on an equal basis to all parts of society, and leave no-one behind.

But are the traditional technologies of public services - the written word, a fixed address, legal jargon, complex paper forms and tax returns - any less excluding than a web browser or a mobile phone? What matters is that we engage with people on their chosen media, in ways which work for them, and offer them something they actually care about in a language they can understand. If there is real value in these technologies, people will find all kinds of creative ways to access them.

### Control

These technologies are putting new powers into the hands of ordinary people, changing the way we structure and experience our world. The social web, mobile phones and digital media have given an ordinary person the same communications reach as a multinational company twenty years ago. A guitarist can sell an album in Tokyo from his Glasgow bedroom, without approval from Warner Music; a 7-year-old in Salford can make a film on her phone and have it seen by more people than watched News at Ten. The implications of this are particularly disruptive for the media, large organisations and governments, and they are treading carefully.

Genuine empowerment is frightening. It implies losing control, giving away knowledge and power. But, if managed correctly, it can make good political and commercial sense.

And it may be your only option.

## Risk

The biggest barrier to innovation is often the difficulty of predicting what is involved, and therefore of managing the risks. Predictability makes everything safer. If you run a standard workshop, or treat 300,000 people for cancer, it is relatively easy to set the budget, manage the process, and show the difference you have made. Trying something new always involves stepping out of your comfort zone.

Taking a risk is easier for commercial companies who can assess the return, shrink the budget to fit, and hedge their bets to cope with failure. But if you're delivering a key public service or spending donated funds, the cost of failure can be your reputation, maybe even your survival as an organisation. Even success isn't always useful unless you can prove it, or budget for it.

So if you want something to throw your money at for a guaranteed return, this may not be it. The trouble is, as new technologies begin to reshape our world and our expectations, the same may soon be true of the old ways of doing things. Playing it safe just got risky.

## So why...?

So this stuff isn't straightforward. It won't work for everything, and there is no quick-fix or reliable solution that is guaranteed to give you results. The use of these new technologies requires new skills, and also a mindset disposed to riskier, more flexible ways of working. They require a **shift of priorities**, a new approach to managing people, projects, risks and resources, and a willingness to surrender some control. And even then, they may not give you the results you expected.

### **Because the possibilities are huge, and the costs are low**

Digital technologies bring the cost of failure down. Twenty years ago, making a corporate video meant risking thousands of pounds, but now an enthusiastic intern can make one in an afternoon. Even five years ago, getting a website for your business meant spending thousands of pounds on design and development fees, but now tools like MySpace and Wordpress let you make one for free in under an hour. The investment needed to experiment with these new tools is sufficiently low that it is genuinely possible to act first and analyse later.

### **Because these technologies are already here, and they aren't going away**

Your staff, your customers, your beneficiaries are already using them, if not professionally then personally, and ignoring them is only going to get harder. Many organisations have banned their staff from using [Facebook](#) [7] and [instant messaging](#) [2], but what happens when your customers, or even your funders, start communicating with you via these channels? These technologies are not gimmicks. This is no flash in the pan. **They're here to stay**, and their impact on our personal and professional lives is just beginning. As adoption levels rise, refusal to engage becomes riskier to sustain

and harder to justify.

### **Because playing it safe is becoming risky**

The world is now a noisy place. Never before has so much information been so readily available to us, and in the face of this we are engaging with it in new ways. We no longer sit and consume content. Instead, we give our attention to the few sources we trust and that are offering us something of real value. We seek out people we trust to make sense of the noise, and we expect an increasing level of personal attention in return. So, build your corporate website, send your newsletters and buy more advertising space. But expect diminishing returns, and more and more pressure to **engage with people on their terms**, and in more personal ways.

## **And so...?**

There is a wealth of technical talent out there, but energy currently being driven towards creating 'the new Facebook' or 'the next iPhone' could instead be given an alternative, social outlet. We need fewer cool tools and more **useful, effective software to improve our society**. As social innovators begin to engage in this new world, the impact on our lives could be huge.

The opportunity is there, but to take it will require a shift of **mindset**, mandate and expectations on the part of social innovators, charities and public institutions. Because once upon a time, there were captive audiences, things we wanted to tell them, channels for reaching them, a group of people who were waiting to be 'serviced'. Now that's all changed.

If you can no longer assume that an audience will engage, then your task becomes different. Rather than deciding what you want to tell people, you must find out what people want to talk about. Rather than forcing people to come to you, you must go to where they are already. **It's not about doing things to people, it's about helping people do things.**

And from there, **everything shifts**. Commissioning, project planning, procurement, risk management, evaluation, business models, staffing, branding, mindset, relationship to users, relationship to technology, and so on.

This handbook lays out a route map for how to approach this **new kind of project**. It is an early attempt at a beginners guide for how to use communications technologies to bring a community together to do something practical of social benefit. It gives answers and instructions when the route is known, and suggests a direction of travel where the path is still unclear. Everyone has to find their own way, our aim here is to point to the main staging points.

It's not really about technology. **Technology is a trigger**, and an enabler, allowing us to do something we wanted to do but previously couldn't (Simon Berry's [Colalife](#) <sup>[22]</sup> campaign, for example). So it is the starting point, but it isn't the end point. We want to

show you how to use these technologies without losing your way or missing what's important – and give you a model for what 'good management' actually looks like.

This is new stuff, and we don't have all the answers yet. This is just the beginning, **a starting point for a new conversation**, about how to help the people around us by bringing them together to help themselves.

Welcome.

# Navigating Social by Social

A step-by-step guide to trying out these technologies for yourself

by **DAVID WILCOX** and **ANDY GIBSON**

## You are here

This handbook aims to provide practical advice for people who may be commissioning or funding projects, developing projects within an organisation, or starting up something new.

From our research and experience, we've identified what we think are the main areas of work involved in developing a 'social by social' project. It isn't a straight-path routemap though: as you'll see, you have to be flexible in your work plan. We would love to be able to say: here's a set of guidelines for using new technologies for social good; here's precisely what works, and here are the action-plan checklists for a detailed process. But it's a bit more complicated than that – which is why a high proportion of technology projects fail.

Yes, there are some recipes ... but you first have to learn to cook, assemble the ingredients, decide who and what you want to serve, and be clear whether you are preparing a healthy snack or for a more substantial festive occasion. If it is a big do, will you hire caterers, or do it yourself? And to push the metaphor even further, what good is a delicious meal if there's no-one around to eat it?

So this chapter is designed as a kit from which you can assemble what's appropriate to your situation.

It contains:

- Directions – some suggested routes and actions to take at each stage
- Insights – practical advice and comments from successful (and unsuccessful) projects
- How-tos – some recipes for achieving specific goals, once you know what you want to do
- See also – further reading and places to go if you want more advice about each

## section

We suggest you also read it together with the [Propositions](#) <sup>[23]</sup> the [A-Z of key terms](#) <sup>[2]</sup>, and the practical [Companion](#) <sup>[7]</sup> that follow, where we've defined the jargon we're using and described the key tools and concepts in more detail.

# Where do you want to go?

Without a destination, you will get lost

- where to start with your project
- how to ask the right questions
- what to do before deciding on the tools you're going to use
- how to avoid the most commonly-made mistakes in technology projects

New technologies offer powerful tools for social progress, but in working with them many old principles still apply. You need to know *why* you want to do something before deciding *how*, otherwise you could fall into the technology trap of having achieved little but spent a lot. You need to know what you are trying to achieve, and for whom.

Developing a project with social technology is first social, second technical. Technology is a great enabler – but it is still people who make it work. The technology may look as if it offers solutions, but it is the last thing to decide on. [Ann Holmes](#) <sup>[24]</sup> argues that processes and tools are only one part of success. As well as the right technology, you need to consider:

- Purpose, the 'why' – influencing people, improving services, widening opportunities or tackling a specific problem. Focus on what you are trying to achieve, and nothing else.
- People, meaning everyone involved – beneficiaries, contributors and supporters. Consider their needs, their skills, what motivates them and what they are capable of.
- Context, the current situation – for example locality, organisation, conversations, culture – and everything that goes with it.

The *human* context you're operating in determines what is possible. There could be many different personalities, and a culture of 'how we do things round here'; maybe a shared sense of what's worked and what hasn't; and an array of assets like equipment, premises, skills and relationships. You need an idea of what is possible, and how to approach it, before you set off.

Only once you have clarified these are you in a position to choose the tools and decide how and when they will be used. A clear, realistic objective will stand you in good stead throughout the journey ahead.



# Context is King

Anyone can use these new tools – in fact that's the whole point – but that also makes it difficult to write a step-by-step guide to how 'you' should run your projects. We can sketch out a route, but the actual path you need to take will depend very much on the context you're operating in. We've focussed on three typical contexts in which you might be running 'social by social' projects.

## **1. Individuals or small groups building a new project (the 'start up' model)**

- likely to have a big idea;
- clearly focussed on audience, users, customers;
- full of enthusiasm, but maybe lacking some skills;
- perhaps looking for somewhere to work – or at least meet;
- probably short of funds to cover early costs; and
- likely to have to spend a lot of time pitching ideas to funders or investors.

## **2. A project leader inside an organisation**

- might have a big idea or want to improve current activities, or just to 'see what's out there';
- likely to be constrained by the current attitudes and culture within the organisation;
- may need to convince colleagues, and perhaps a board, before securing funding;
- may well have another job to do, and targets to hit; and
- may have to use the technology favoured by their technology colleagues.

## **3. A funder or commissioner looking to initiate a new project**

- may have a policy objective – but no set view on how to get there;
- probably have limited time to do research, explore technology or make an impact;
- will be concerned to have some way of measuring success against objectives;
- could be relying on those proposing projects to supply a methodology; and
- are likely to be faced with a bewildering range of proposals.

Whatever your situation, whatever you have set out to do, here are a few things you'll need to consider.

## **How to become a digital activist**

by David and Amy

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1. If possible, find a friend who will be your digital mentor, someone who's done this before and can give you tips and support along your journey. If you don't know anyone personally, chances are there will be a dozen people in your organisation who know this stuff inside out (assuming you haven't fired them all for using Facebook during working hours).
2. Look, listen and explore widely. Try some of the services offered by the big names like Google, Yahoo, Microsoft, and sign up with one of the social networking sites like [Facebook](#) [7]. Experiment with specific services that seem most relevant to you – [Flickr](#) [7] for photos, [Twitter](#) [7] for short messaging, [YouTube](#) [7] if you are a video enthusiast.
3. Experiment with web searching, do some online research and set up a good personal knowledge system for organising files, bookmarks, mailboxes.
4. Subscribe to some of the best bloggers in the field (possibly using an [RSS newsreader](#) [2]) and follow their tips.
5. Now you can see the landscape, clarify your priorities. What real need do you want to address? And what real need are other people already articulating?
6. Try setting up a simple web site using a wiki from [Wikispaces](#) [7], [Wikidot](#) [7] or one of the other providers; or set up a blog (you can keep it private) with [Wordpress](#) [7], [Blogger](#) [7], [Typepad](#) [7] or a similar service.
7. Make friends online and get attention for your project by commenting in other people's spaces – blogs, discussion forums, [Facebook](#) [7] groups, [MySpace](#) [7] pages and so on.
8. Ask your community where they want to connect with you online that they aren't already.
9. Evaluate your current online activities against your community/audience needs and your own goals, and move away from strategies and tools that aren't working. Focus your energy and capacity on the tools that are delivering value.
10. Continue evaluating and asking your community for feedback and let the community and organisation's goals drive your next steps.

## How to introduce social technology to an organisation

by David

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1. Start by using as little technology as possible. Experiment with free or low-cost tools and grow from there. The less you spend, the less pressure there will be to get it right first time.
2. Get the chief executive blogging.
3. Expect people's attitude to be more important than skills in adopting new tools. If people are really keen they will find a way, if not it will be slooooow.
4. First learn how to listen and converse online ... by reading blogs, through [RSS](#) [2], bookmarking resources, commenting.
5. If you want people to communicate or collaborate online, bring them together face-to-face first.
6. Blend online and offline communication methods.
7. Don't expect social spaces online to work without a host. Face-to-face events don't

- unless everyone knows each other very well.
- 8. Don't expect collaboration spaces like wikis to work easily unless people are familiar with the tools and comfortable with each other. Workshops need facilitators – so do collaboration spaces.
- 9. Expect people to be different in their preferences. Some will write, others take pictures or make movies. Work with people's strengths - give support where they are weaker.
- 10. Go to other people's places as well as attracting them to yours. On the web the walls are coming down.

You can also show the potential of these tools by picking a smaller opportunity to use them;

1. Find an enthusiast within the organisation who has enough authority to 'just do it' – at least in a small way.
2. Choose an event whether there is scope to develop content before, at and after ... including photos and video.
3. Help the enthusiast set up a blog, start blogging, and find some other social reporters for the event.
4. Lend the reporters simple video cameras like [Flips](#) <sup>[25]</sup>, and encourage them to do interviews and hand the cameras around.
5. Publish videos and reports, email people who were there, keep on blogging and commenting.

## Focus on the goal

Ask anyone involved in a technology project about what's important and you will generally get the answer – it's the people. Obvious really, because these projects are social. They are about people helping other people solve problems, get better services, support themselves and each other. They are not about factories, robots, computerised ticketing or online payment systems.

Of course the technology is hugely important because that is what makes the difference – by helping deliver the services, by triggering change, challenging ways of working through the shift in power relationships it can enable. And also because many people don't have access, don't understand, and can't use new technologies. It is transformative, disruptive, empowering, divisive all at the same time.

Because the technology is unfamiliar, we may assume that it is thing we most need to learn about, if a project is to succeed. In fact, the technology often turns out to be the easy bit. If you ask where things most often go wrong, you'll usually hear about lack of uptake (by people), poor relationships (among people) and obstacles in organisational cultures (developed and maintained by people). The trick is understanding how people are likely to respond to your project, what they really need, and how far the organisational settings they are in will help or not.

What is of supreme importance is the purpose of your project. It's a bit like the scene in Alice in Wonderland, when Alice meets the Cheshire Cat and ask for directions:

"Would you tell me, please, which way I ought to go from here?"

"That depends a good deal on where you want to get to," said the Cat.

"I don't much care where—" said Alice.

"Then it doesn't matter which way you go," said the Cat.

If these technologies are the new Wonderland, we still have to care about where we want to get to. This means asking the old questions: why are we doing this, who is it for, what do they need? Only then can we work out which wonderful technology tools might help ... and whether they will work for us, and for others colleagues.

## Don't jump for the tool

The possibilities presented by these new technologies can make it tempting to jump straight for a fashionable tool and expect it to improve things. For example:

- Need to provide updates and gather feedback? Why not try a [blog](#) [2] (rather than an [e-newsletter](#) [2])?
- Want to collaborate on a report? Go for a [wiki](#) [2] (instead of tracked changes in Word).
- Keen to engage a group in discussion on a series of topics? Why not build a social network (instead of a [forum](#) [2] or [e-mail list](#) [2]).

Yes, it's important to try the tools so you understand the possibilities (see [Experimenting with the technology](#) [26]). But it's easy to get distracted, and if you ignore the 'who', and 'why', you may find no-one is reading your [blog](#) [2], contributing to your [wiki](#) [2] or engaging in your [social network](#) [2]. Work out what you want to do, and then choose technologies appropriate to the people you want to reach - not the trendiest thing you can find. This applies to building your own tools too: [Patient Opinion](#) [27] spent their first nine months on market analysis in preparation for technical development, so that they could build something people would actually use.

All of this means that clarifying your core purpose is the single most important thing you can do – so make some time, involve everyone in the process, and get it right. A good statement of your core purpose can guide everything you do; a bad one will make you anxious and confused at critical moments, and even leave you stranded in the technology jungle with no map of the way home.

All tools – old and new – work for different purposes. Saucepans, casseroles and frying pans are all useful in cooking – but we choose the pots and pans we need for a particular recipe, and the recipe depending on who's coming to dinner. It's the same with technology tools: it's 'who' and 'why' first, then 'what' and 'how' later.

Remember:

- What's the point?
- Know your target audience and what motivates them
- Know your platforms and their features and constraints
- Identify a need/desire that this product is filling
- Focus on one single, simple idea

Whatever your situation, spend time at the beginning working out a clear sense of what you will do, for whom, and how to make that fit appropriately into the context around you. If you don't you may make quick progress, but it will probably be in the wrong direction.

## See also

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- David Wilcox on [choosing tools for a network](#) <sup>[28]</sup>.
- [The technology trap](#) <sup>[29]</sup>.
- [Community-based models of social change](#) <sup>[30]</sup>.
- Ed Mitchell on [three types of online facilitation](#) <sup>[31]</sup>.
- [Howard Rheingold](#) <sup>[32]</sup> on how mass collaboration has evolved through history.
- [Rohan Gunatillake](#) <sup>[33]</sup> of NESTA on understanding how behaviours developed online are leaking into wider society.

# Before setting off

The all-important research and preparation

- how to get the best out of research on the internet
- why it's worth sharing what you find out as you go along
- what to focus on when researching a technology project
- how to tell if what worked for someone else will work for you

All good advice on planning new projects will say "first do your research". What do people really need, what else is going on in the field, what's worked in the past, what assets do you have, and so on. It's a matter of looking 'out there' to the marketplace and 'in here' to your team and organisation.

Research will be daunting unless you have some focus, so keep asking yourself (or whoever gave you the research brief) why you're developing this project, who it's for, and how you'll know if you've succeeded. But it's a balance too: sometimes the best ideas sometimes come up by chance. Stay focussed, but keep an open mind.

## Where to start?

We all learn in different ways, how you learn will depend on who you are. Some of us love to do lots of reading before anything else, others prefer to contact experienced people and have conversations, while the hands-on enthusiasts will want to try the technology out and learn by doing. Our advice is start with your enthusiasm, and don't

be afraid to dive in.

One of the good things about these new technologies is that many people involved like to be asked for help, because they can show what they do, make new connections, get new ideas. You can ride on the back of other people's research by going to [Delicious](#) [2] and searching through what others have bookmarked, or search more widely using Google and other [search engines](#) [2]. Start following conversations on blogs, [Twitter](#) [2] and other online spaces, then join in by asking questions in comments, replying to peoples' posts and posting new discussion topics. You can even use sites like [School of](#) [2] [Everything](#) [2] and [Meetup](#) [2] to find people near you and talk face to face.

Share your research as you go along to get the best out of the internet. [Set up a simple blog](#) [7] about your project, and start writing about it. Then you have a base from which to ask questions, comment on other people's posts and invite their comments back. There's an old adage – if you want to master something, teach it. Blogging what you've learnt can be a softer version of this: research, reflect, write, share, reflect, comment and so on, enhancing your understanding as you go.

## How to create a blog strategy

by Amy

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Blogs can be a great way to get into conversations and experiment with technology at the same time. They're free to set up (see the [Companion](#) [7] for details on how to do that), and give you a great way to post your opinions and respond to what's 'out there'.

1. Consider/identify the information from your website, programs, other communications/campaigns that you will want to highlight via the blog.
2. Consider/identify content from other areas that you can repurpose on the blog.
3. Consider/identify all of the possible contributors to the blog, and what types of content/topics they will contribute.
4. Consider/identify the goals of using a blog (do you want a more casual way of disseminating information? Do you want to start a conversation with readers? Do you want to aggregate content and information you come across from other blogs/organisations/news sources?).
5. Consider/identify how often you'd like to post.
6. Start writing the blog posts, follow the schedule as it pertains to frequency, contributors and content, BUT do not publish any of the posts for a month or two. This will give you a chance to test whether the schedule is too frequent, if people interested in contributing aren't comfortable with writing blog-style content, or if you don't have enough information to write about, and so on.
7. After you have 1. written for the blog for a month or two 2. have evaluated how the blogging schedule, contributors and content help reach the goals for the blog and 3. have adjusted your schedule. to better reflect the reality of your contributors, information/content, and audience, start publishing the posts.
8. Announce your blog via all outlets, including: your newsletter (both traditional, hard-copy newsletters and e-newsletters), your website, your profiles on any other

social media tools/platforms, emails (try putting a link to your blog in all staff email signatures), and so on.

## What to research

There are two strands to focus on, and both are equally important:

‘Out there’ – the context and audience for your project

- What’s already going on. Who are the competitors, or potential collaborators.
- Who’s writing about the issue (both for research, and later for getting the word out).
- What has succeeded and failed before – and why.
- The needs of your audience, users, partners, the people who will be involved.
- Where they are, online and offline, and how they currently interact with each other.
- What’s working already that could be expanded, improved or scaled.

‘In here’ – your team or organisation

- What has been tried before by your team, and by other teams.
- What policies and attitudes might get in the way of doing something new.
- How something different got started successfully last time.
- The people you’ll be working with, their enthusiasms, skills, mindsets.

Try to involve all your audience and stakeholders in the research – partly to cut down the work, and partly to because it really helps to develop good working relationships early on. Talk to them, survey them, and if possible bring them ‘in here’ to become part of the design of the project.

We can learn a lot about stakeholder engagement from the past 30 years of participative design and development in the non-tech world. Prepare well, build trust, allow enough time, use language and methods people can understand, and mix formality and sociability. Be open and explicit about how much say people have, be humble about not having all the answers, specific in your questions for people, and open about why you’re asking.

Create different options for engagement too, so people with only 5 minutes can still help, and those who can commit 5 hours can help you more. Put the time commitment up front by labeling options as ‘5 minutes to help’, ‘1 hour to help’, ‘half day to help’, or ‘full day or more to help’. People can self-select what they feel comfortable with and you’ll also avoid people signing up for something they can’t finish.

Your research work isn’t just about gathering information: it’s also the first point of contact between your project and the outside world. Right from the start, try to be open

and communicative about what you're doing rather than keep your ideas to yourself. The more people understand what you are trying to achieve, and get to know you and your team personally, the more time they will give to helping you. Be personal, be honest, be polite, and offer your own opinions before seeking theirs.

## Understanding the technology

We hope that this handbook will give you plenty of routes into understanding the technology. Check out the [Companion](#) <sup>[7]</sup> later for a set of key tools and new technologies 'out there.' Visit the sites, read about them, try them out.

Remember though that the technology must be evaluated and understood in terms of the context and purpose of your project. A technology that worked well in one campaigning or organising situation may not be appropriate in another, and often for very subtle reasons. It often makes sense to try many different tools and approaches – as the [Colalife](#) <sup>[22]</sup> example showed – and put energy into the things which work best for your particular situation.

The more you understand the [context](#) <sup>[34]</sup> you're operating in, and what you want to achieve, the easier it is to see how technology could help.

### A word on 'What works'

While it always makes sense to look for examples that could provide helpful lessons, the question 'what works' is only useful if it is qualified by information about the context, the purpose, and the people involved. In fact, it may be more useful to ask – [as Clay Shirky suggests](#) <sup>[35]</sup> – what hasn't worked? This can be more helpful than lists of 'best practices' because the question will prompt a story that gives the full context, and so helps you understand the underlying issues. A recurring theme in talking to people who have developed 'social by social' projects is that 'it's the people who make it work,' with their particular skills, enthusiasms, and circumstances. Simply asking 'what works' may invite a response that focuses too much on the tools and misses the context.

### See also

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Robin Broitman and John Eastmond at the Interactive Insights Group have compiled some extensive lists-of-lists signposting you to blog and other sites with case studies and how-tos.

- [How to Sell Social Media to Cynics, Skeptics and Luddites](#) <sup>[36]</sup>
- [100+ Resources to Boost Your Social Media Savvy in 2009](#) <sup>[37]</sup>
- [Social Media Case Studies SUPERLIST](#) <sup>[38]</sup>



- Superlist of What Not To Do in Social Media <sup>[39]</sup>

## How to find out what's already been done by others

by Amy

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1. Read reports and analyses (like those from NTEN, Idealist, TechSoup and others monitoring the sector) to gain perspective on trends and issues, as well as specific use cases by the organisation's profiled (either embedded or in the appendix).
2. Ask colleagues in other organisations what they have seen/think.
3. Find organisations serving your field (funders, advisors, government, etc.) to see what projects they are highlighting (for success or lessons learned).
4. Review blogs of consultants and organizations working in your field to see what projects they are highlighting (for success or lessons learned).
5. Investigate the current landscape & conversation (see other how-tos) and watch for the participation of other/competitor organisations.

## Down the rabbit hole

Don't wait for permission, just dive straight in

- when to start experimenting with these technologies
- why you should make these experiments part of your research
- how to join in the conversations already happening online
- what to do before you start an official blog

Social media projects are unpredictable, because what happens is the result of everyone involved the users as much as the people creating the tools. The only way to be sure your ideas will work is to try them out. The good news is that there are low cost, low risk ways to do this.

Tim Brown from IDEO argues that exposing your ideas to the real world early on is critical to their eventual success: "Rapid prototyping and 'learning by making' is already an accepted strategy for effective innovation. For participatory systems, this is even more important because the complexity of the interactions cannot possibly be anticipated by even the smartest of plans. The reality is that these prototypes cannot live in the lab; they have to be let out into the wild. So, we need to start getting comfortable with letting others participate in our innovation activities."

So before you get too bogged down in research and setting up a full-blown project, we strongly recommend that you do two things: try some of the technology for yourself; and get into the conversations, online and offline.

# Getting into the conversation

Doc Searls, co-author of the *Cluetrain Manifesto*, which famously argued that “markets are conversations”, has expanded <sup>[40]</sup> this original thesis to the proposition that markets are conversations, relationships and transactions <sup>[41]</sup>. If we interpret markets to mean anywhere we are trying to engage with others and get things done, it follows that the first thing to do is start talking with others.

More importantly, you don't know what a community knows unless you are part of it. The thing you are trying may have been tried before, or perhaps already exists and you don't know about it. Market research, competitor analysis and a little Googling is all very well, but if you want to be sure of the territory you're stepping into, you need to speak to the people who live there.

Start by listening to understand the language and nuances of the community, and then venture a few words (or images) of your own. It is worth showing a little humility, and saying you are new around the place: people are usually happy to help if you approach respectfully. What doesn't work is bringing in preconceptions from mainstream media about the apparent worthlessness of Facebook <sup>[2]</sup>, Twitter <sup>[2]</sup> or whatever tool is currently fashionable. They are all aids to conversation ... just like phones and tables and cups of coffee. They're only as interesting as the people using them.

Learn to listen in, and listen out, for what interests you, and tune your responses to the situation. You can't interact or transact until you are able to have a conversation.

## How to find and join the conversations that are already happening

by Amy

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1. Visit Technorati <sup>[7]</sup> and Google Blog Search <sup>[7]</sup>, where you can search for key terms as well as your organization's name or services, and find the popular blogs <sup>[2]</sup> related to your area of interest. Once you find one or two blogs you like, exploring their blogrolls <sup>[2]</sup> or recommended links will often lead you to other useful sites.
2. Subscribe to blogs you like via RSS <sup>[2]</sup> with an RSS newsreader <sup>[2]</sup> (like Google Reader <sup>[7]</sup>), as well as the RSS of comments (if available) to help you stay on top of the conversation, feel out who is participating and note how the conversation unfolds (if the blog author responds in comments, if it is just readers, if there are links to other blogs/posts, etc.).
3. Visit delicious.com <sup>[7]</sup> and search for key terms about your services and sector.
4. Visit social networking <sup>[2]</sup> sites like Facebook <sup>[7]</sup> and find Groups & Pages related to your services, sector, or even about your organization, or specialized networking sites like Ning <sup>[7]</sup> where you can find communities related to your field, cause or services.
5. Visit social action networks like Change.org <sup>[7]</sup>, Care2 <sup>[7]</sup> and Social Actions <sup>[7]</sup> to find

groups, calls to action, and fundraising appeals about your sector, your colleagues/competitors or even your organisation.

6. Visit the websites of other service providers, supporting organizations, or partners (this includes everyone from organizations serving similar goals in other geographies, funders, service organizations, or groups you partner with) to check out if/how they are engaging online.
7. Give yourself time to "lurk" or just follow the blogs and comments, read the links, a few weeks of consistent reading (sometimes people take months to feel comfortable).
8. Dive in! Leave a comment on a blog post or in reply to another comment, or start posting on forums and social networking pages. Remember that it's about conversation, so feel free to share your ideas, ask questions, or provide information, whatever you want!
9. If the blog author/s provide a contact email address, you can use this to take the conversation further. Send an introduction including where you work, what you work on, or what you are interested in.
10. If you want more, check out the great resource from [WeAreMedia: Participating in the Conversation](#) <sup>[42]</sup>.

## Experimenting with the technology

Ken Thompson specialises in network communications and collaboration. Asked how best to engage people, [Ken came up with this analogy](#) <sup>[43]</sup>: "go back to my experience of learning to fly a light aircraft and sitting in the cockpit with the instructor, hoping at the start that by watching the instructor I could pick up the skills and then realising, no, I have to start taking some risks and get my hands dirty".

[Writing in 1997](#) <sup>[44]</sup>, Steve Snow, one of the pioneers of online community networks, urged those starting a project to "just do it", saying: "it takes a dash of 'devil-may-care' to make it happen, a belief that the power and urgency of the concept demands that you do this. Perhaps a less intense way of saying the same thing would be this: "Don't let anyone tell you you cannot do this." Make friends, forget enemies; collaborate with anyone that will have you; be clear about partnerships; choose volunteers carefully; build on what's here; look out for opportunities; and look after yourself.

The best way to promote use of technologies is to help people try it – starting at the top. [Ian Hughes](#) <sup>[45]</sup> works for IBM, evangelising the potential of social technologies, and when he is asked how to help organisations use these new tools he says, "I need you, the person who has asked the question, to experience this stuff. Go to blogger.com, create a simple blog – anonymously if you want – and start blogging ... about what you had for dinner, about a fishing trip, just so you felt what it's like when you pressed that button, published to the world, and shared what you are doing".

If you haven't experienced social media you may think it is about sharing information ...

“but it is not, it is about sharing who you are and what you do and what you are interested in, because that’s what connects people. People connect with people. The technology is merely a way to facilitate that.” He finds people assume someone will simply come in and install lots of tools and get everyone blogging and sharing – but it starts with the people – that’s you, right now – not the technology.

Steph Gray is a civil servant responsible for social media and new technology deployment. He’s produced [his own guide](#) <sup>[46]</sup> to getting started with social technologies, from a UK public sector angle. He argues that organisations should be “equipping some brave pioneers with the equivalent of media training or putting some smartboards in meeting rooms, not putting a phone on everyone’s desk and expecting them to use it all day long.”

You are that brave pioneer. Time to get stuck in. The [Companion](#) <sup>[7]</sup> section of this handbook outlines a whole host of different things to read, and more importantly tools to try out, to get you started...

## Getting started with social technologies

by Steph Gray

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- Find some interesting people to read, and a manageable way to keep track of them
- Start listening to the online discussion
- Set up some profiles
- Start watching and listening
- Start bookmarking and tagging
- Be silly
- Get collaborating
- Put the computer down and go and meet some people
- Look at how other people are doing it in the public sector
- Join a virtual world
- Read some dead trees

## Designing the project

Making the case, building the team and managing expectations and risk

- how to choose design principles that will keep your project on track
- what to do when your users surprise you
- how to persuade your boss to let you use Facebook at work
- who to surround yourself with to make your project a success
- how to budget for unpredictability and where to spend the money

Once you have crystallised your purpose, identified your audience, done some research

and got stuck into the conversations and the community, it's time to think about how to structure and develop your project. Your project should be structured in a way that makes it easy for you to concentrate on serving your core purpose – which means giving you the space to work flexibly, respond to your users, and make the most of the assets you have. It also means making sure you don't run out of resources just as your community starts to take off.

There are various checklists around for what to consider when setting up a new project. Amy suggests <sup>[47]</sup> you identify:

1. The audience or community you want to engage
2. The resources currently available within you organisation
3. What success looks like
4. What technologies are most appropriate
5. What measures of success can be used

She also suggests using the POST model <sup>[48]</sup> developed by the Forrester Research Inc: analyse People, Objectives, Strategy and then Technology. Meanwhile Beth Kanter offers a Social Media Strategy Map <sup>[49]</sup> covering identifying objectives, identifying the audience, integrating, culture change, capacity, tactics and tools, measurement and experimenting.

So there's a lot out there. Here are a few of our suggestions about how to set up your project to succeed. In addition to having a clear goal, you should have a clear idea of the way that you want to do things. It can be helpful to start by writing down your own project design principles. This should give you something to check back with and ensure that you're still on track.

## Agree your principles

When developing your own principles, you could start by looking at NESTA's networked innovation principles <sup>[49]</sup>:

- Start with relationships, not transactions. In social spaces trust may be as important as specific products and services
- Be clear about the invitation. When engaging with people, be explicit about what's on offer.
- People need to be seen and heard. Recognise and reward what people say and do.
- Follow exciting leads. Leave space for the unexpected
- Let pragmatism dictate the hierarchy. A balance of bottom-up and top-down may be needed.
- Don't lose the human touch when going to scale. Decrees from on top will not create a sustainable model.

Take time to identify the principles that define your project. Whatever you end up with should embody the spirit of what you are trying to do, and also be in keeping with the

values and culture of the community you're working with. Make them public to audiences and stakeholders and use them as a way to engage people, and reassure them of your intentions. If anything you consider doing later goes against one of your principles, chances are it's taking you further from what you set out to do.

## Set goals, but expect your users to change things

Susan Cramm, writing in Harvardbusiness.org <sup>[50]</sup>, is forthright about the importance of having clear goals: "In most cases, the benefits outlined in business (cases) are a work of creative fiction, and, once the initiative is approved, they are filed and forgotten. Smart leaders don't waste their time with this. They play the game, but they know how to make the game worth playing. They understand that only 30% of IT-enabled business initiatives deliver as expected and that the other 70% are plagued with unclear business objectives, missing-in-action executive support and inadequate user involvement. To create a successful business case, smart leaders focus on two goals: 1. Build support. 2. Define clear objectives."

However, the internet fundamentally changes the nature of organising, and organisations. Because we are used to working within hierarchical organisations that create controlled, centralised environments, we may be tempted to design projects using these new tools in that way. We think shop, office, factory, brochure – and then web "platform". But the web is decentralised; it is a network where individuals and groups can create their own spaces. As a consequence, the success and sustainability of an initiative may not depend upon maintaining the centre: it may depend upon the motivation of the participants to drop by and contribute.

This presents a lot of problems for project managers: having a clear set of tactics and milestones is much harder when you are responding to the demands of a community. For a start, if you engage with users in the design of your project, they may have different ideas from the ones that you started with. SawvyChavvy <sup>[7]</sup> began with the aim of creating a public network of citizen journalists, but it turned out that a closed social network was a more effective way of empowering young gypsy travellers to tell their stories, even if it meant telling them in private to begin with.

Sometimes the community doesn't want what you're offering; they want something better. Be prepared to be flexible – the alternative is most likely frustrations and failure later on.

## Dealing with resistance

One of the main barriers for organisations aiming to use new technologies for social

projects is likely to be mindset – and often not of your target audiences, but of your internal and external stakeholders. If you work in or with large organisations, particularly ones that have been running for a long time, the pressure to preserve the status quo is huge and overcoming the barriers to taking risks and working in a new way will most likely be a major part of your work.

Objections to new ways of doing things are usually deep-seated and rooted in good intentions and experience, particularly fear of reputational risk, distraction from core objectives, loss of productivity and costly project failures. Concern for **organisational reputation, protecting precious resources and budget**, and **avoiding excluding people** who aren't tech-savvy, and a general sense that **these technologies are a fad** are all common arguments.

One of the biggest obstacles is fear of losing control – or of giving people autonomy to take risks. Steve Dale and Michael Norton <sup>[51]</sup> reflect on this in the context of communities of practice for local authorities. One person said *“I'm not sure that we have permission to innovate in our organisation.”*

It can also be hard to convince leadership that working with social technology is commercially valuable and doesn't mean paying you to chat to your friends on Facebook. Colin McKay, who works in a government agency in Ottawa, Canada, says in The Secret Underground Guide to Social Media for Organisations <sup>[52]</sup> that it is hard to convince your boss to even experiment with social media, because it is perceived as being a lot of extra work and first you have to deal with the fact that it's blocked by existing organisational policies and firewalls.

These are real concerns and you need to understand them, and learn how to articulate the **opportunities** as coherently and persuasively in a way that acknowledges people's concerns.

Just as there are common arguments against social and digital technologies, so too are there common ways to respond. For example, here's NTEN's list of Ten Common Objections to Social Media Adoption and How You Can Respond <sup>[53]</sup>. And David Gurteen has produced a comparison of the centralised and decentralised views of World 1.0 and world 2.0 <sup>[54]</sup> that may underlie fears of adopting social technologies.

Jeremy Gould, who until recently worked in a UK Government department, offers various ways to respond:

- **Observation:** Do nothing <sup>[55]</sup> or listen <sup>[56]</sup>. The returns on investment are largely unproven, so avoid the pain of early adoption. But even if you don't start to implement, listen in to the conversations taking place already, and learn to use the tools.
- **Interaction:** Reflect <sup>[57]</sup> or Converse <sup>[58]</sup>. The next step on from listening is to acknowledge what others are doing, and then join in the conversation.
- **Initiation:** Experiment <sup>[59]</sup> or embed <sup>[60]</sup>. Free or low-cost technology tools allow for small-scale low-risk exploration – although you will probably need support in using them. From experimenting you might move to development of tools hosted

within the organisation, with the benefits of integration but with greater cost and complexity.

## How to handle organisational culture shift

by Amy

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1. Starting using free tools, maybe in your non-work hours, to understand their application to the organisation.
2. Get an ally at the executive level.
3. Prepare a portfolio of the field and create your case for change (but do your research first).
4. Share how changes relate to and support organisation's goals, mission, and vision.
5. Tie adoption or use to staff evaluations.
6. Share the results, successes and your evaluations with key staff as proof of your case for change/adoption.
7. Read WeAreMedia's collection of advice and resources on [Dealing with Resistance](#) <sup>[61]</sup>.

I've found that organisations adopting new tools have less resistance when staff evaluations include adoption and use of those tools. For example, when introducing a wiki for staff-wide use, take note of who made edits, and how often, and so forth, and then share this back with everyone to reward the people who are getting stuck in.

## How to plan social technology for an organisation

by David (based on material by [Terry Grunwald](#) <sup>[62]</sup>)

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1. Gain full commitment of the decision-makers: the Chief Executive and Board. Encourage them to gain hands-on experience – you need to help them learn to fly, and they can't do that as passengers.
2. Be clear on your context and purposes before you tackle how you'll reach them. The choice of tools should follow clarification of purpose, audience, users.
3. Explain from the start that you will need to re-think the direction, style and operation of your organisation as you adopt new technologies. You may need a new business model, not just new technologies in the Web 2.0 world.
4. Expect to change the culture of the organisation, particularly if it is currently hierarchical, siloed or internally competitive.
5. Establish procedures, protocols, roles and responsibilities to match the new ways of working.
6. Build the costs of technology into normal operational budgets. Don't treat it as a one-off project; do ensure you cover staff and support costs, and expect these to be far larger than hardware or software costs.



7. Integrate your new online tools with other communication methods, and other projects; make them useful to your colleagues.
8. Identify potential for collaboration, co-development and co-marketing. If someone else is doing it, you may be able to link to them and build on their community and technology.
9. Design for evaluation. Monitor how the technology is used, against criteria for success.
10. Be realistic and go for some quick wins, and remember to tell stories to the rest of the organisation about what's happening.

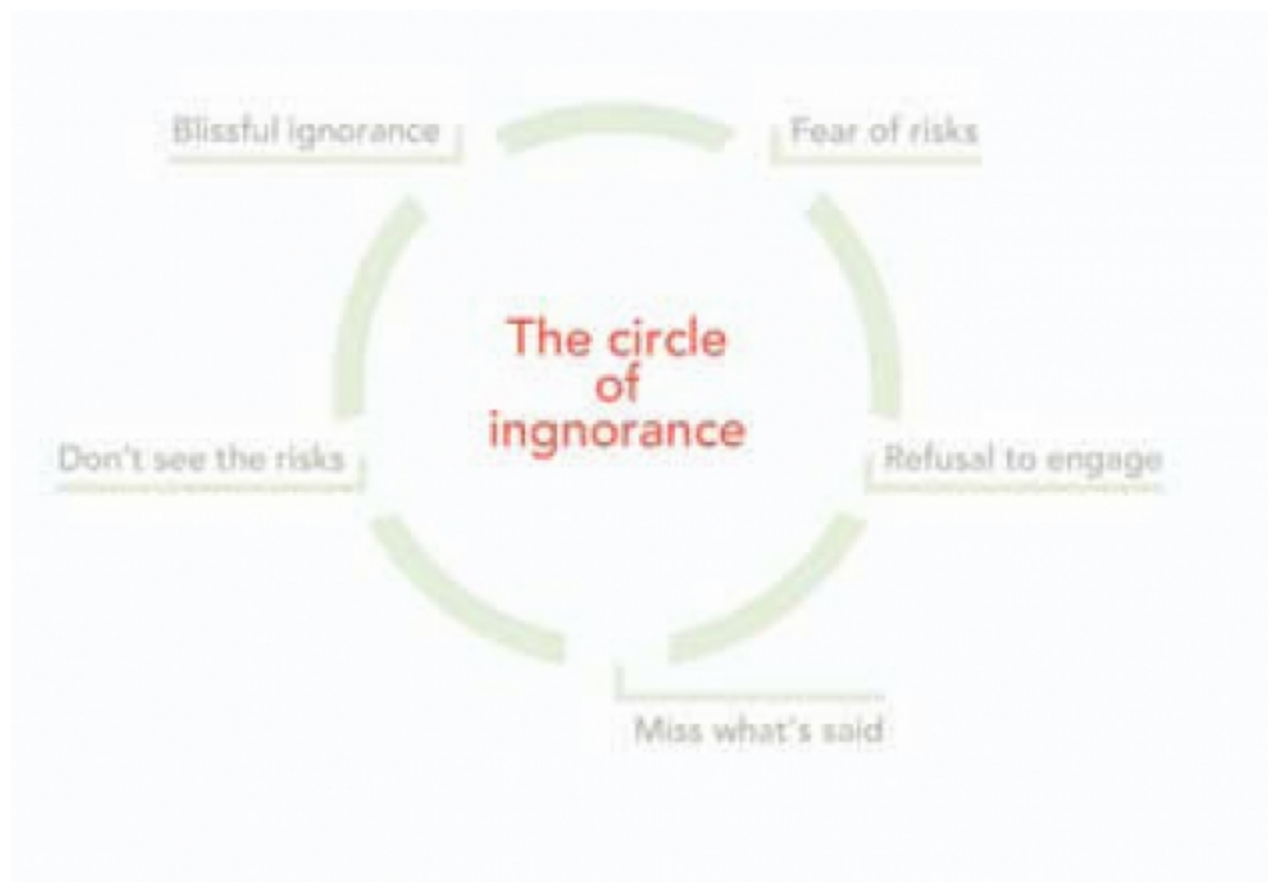
If you want a quick start, you can also try a workshop using [the Social by Social Game](#) [7]. It's a good way to get people talking about social problems and new technologies – and you might find some real projects that people in your organisation want to work on with you.

## Making the case

Chuck Hollis had the challenge of introducing social media to a large corporation and produced a very full [Social Media Proficiency Strategy](#) explaining what was involved. Internal organisational sponsorship was key to their success, but they didn't waste time trying to convince everybody. They didn't need every part of the organisation to support them fully: they just needed a few, and to make sure that no-one strenuously objected to what they were doing. They also found that the natural tendency was to over-complicate things, so the team spent time simplifying the communication of ideas at every opportunity: better to communicate a few ideas effectively than fail at communicating several dozens.

So keep things simple, and work out who you need to convince and who you don't. Begin by thinking hard about the concerns of the sceptics and cynics, and taking them seriously. From their perspective, they're probably right – but they may not be seeing the whole picture. You need to find a way of showing them the parts of the story that they're missing, and helping them to see that there are risks to all strategies, and that there are more opportunities available to them from engaging, experimenting and getting involved.

The first argument is that if your organisation won't engage with new technologies, you **can't engage with the audiences who are using them**. After a workshop on the empowering potential of social media, communication officers in housing associations [remarked](#) *"We can't do that – and they mustn't do it either"*. Their management would not allow innovative use of these new tools – so they couldn't reach out to the tenants who had adopted them. The community was more agile and engaged than the organisation serving it.



If you don't engage you can't support your community effectively, and also **you can't manage what's happening there**. The figure opposite shows a 'circle of ignorance' common to many organisations. The potential of these tools to disrupt existing business value (such as by revealing valuable information, or damaging organisational reputation) leads the organisation to disengage – which means it has no idea what people are saying about it. Sitting there in blissful ignorance is fine, but it's only by getting in the game that you can genuinely minimise the risks presented by these new tools.

Most importantly, you may also be **squandering potentially valuable** assets that could transform your business for the better. You may be missing out on amazing opportunities to attract attention and support for your key products and services, wasting lots of positive energy that could be harnessed to help your cause with the right technological approach. Let the people who want you to succeed help you.

Finally, don't assume that your organisation should support you; take the time to prove that you have a valuable and low risk proposition. Ideally, make things happen online or in the real world and tell positive stories about what's working. Show people some successes first, and then ask for time and resources to scale them up.

And whatever you do, always remember the golden rule:

## “Take a risk, shrink the budget”

You will probably need to make the case regularly throughout your project. Whatever opposition you encounter, remember that no-one responds well to negativity. Don't just attack their arguments: focus on the assets and opportunities – the strength of the relationships amongst your community, the resources available, the skills of community members, the advantages you would gain. Make people aware of these and it becomes easier to justify spending small amounts of time and resources to explore how to make better use of them.



[Adapted from [www.slideshare.net/andygibson/the-human-intranet](http://www.slideshare.net/andygibson/the-human-intranet)] Building a team

## Ten tips on making a business case for 'risky' projects

by Andy

1. Work out who the key decision-makers are in your organisation, and think about what they are nervous about, and what they think is important.
2. Create a positive vision for the best-case scenario for the project that delivers what they think is important.
3. Define your target audiences and what they really want. Be honest: start from who they really are and their emotional drivers.
4. Speak to some target users and get quotes from them saying they'd use the service if you built it, and put them in your proposal.
5. Map the assets that are relevant to the project, including: strong relationships,

existing engagement, successful offline activities, skills of staff, skills of audience/stakeholders, brand perceptions.

6. Write a very clear a brutal assessment of the risks, including the following categories: financial, staff time, reputation, legal, technical.
7. Construct projections for different levels of user-uptake (total failure, small uptake, big success, overwhelming popularity) which outline the key risks with each scenario.
8. Brainstorm ways in which, for each of these scenarios, the assets you have and will gain can be used to balance the risks. For example, if huge user growth will take up all your team's time, then how can the skills of your new community help you create content, moderate content, donate funds and so on?).
9. Rename your Risk Register as 'Risks and Opportunities' and add in positive possibilities against each of your projected scenarios.
10. Find a way to prove the concept for free, either online or offline (don't ask for permission), and tell the story about what happened to support your proposal.

## Building a team

Make sure that your core project team includes people who know the audience and are passionate about the project. Cultivate the enthusiasm of the people delivering the project and it will rub off on your users. It may be better to recruit people with a can-do attitude and preparedness to experiment, than those who have technology experience but aren't strongly committed to what you are trying to achieve.

You can find people in all sorts of places, but online is a good place to start. If you're looking for people who are enthusiastic and experienced at using new technologies, you will find them by using those technologies yourself. The Colalife project gathered a large community of volunteers by using a wide range of online spaces to recruit and engage people, holding social events, and creating a short video for distribution on [YouTube](#) [7].

You may get all the skills you need in your team, or you may need outside support from consultants, mentors or partners. We suggest you recruit some or all of the following roles – perhaps with some doubling up on who does what:

- **Project leader** – responsible for overall planning and direction.
- **Technology steward** – helps everyone choose, understand, install and use the right tools.
- **Executive sponsor** – champions your project within the organisation (if you have one) or with funders or partner organisations.
- **User evangelist** – stands on the side of users and helps them get more out of the tools.
- **Community manager** – recruits users to the technologies, and then acts as host and facilitator.

Recruit people who are good communicators, writers and people-handlers first, and good with technology second (although people who can't even work a computer may slow you down). In the early stages of a project, when you are trying to engage with a wide range of partners, funders and users, it is important to be able to explain what you are trying to do. The technology skills can be brought in when they're needed; the success of your project relies more on how you explain and communicate it.

(Read more about the [Emerging roles](#) <sup>[2]</sup> later.)

## Budgeting and allocating resources

Because many social technology tools are free, and some people commit a lot of personal time creating content, it may be tempting to think that there really are free lunches in the online world. However, all systems require maintenance and facilitation. There will be costs, and these either have to be paid for from new revenues, or from other budgets.

A few years ago it might have been normal to expect to spend anything from 20,000 to 100,000 or even more on the development of a new online platform, with a specialist agency and software vendors. This has changed for several reasons. First, there are a lot more free or low-cost tools available that enable people to construct sites for themselves. Secondly, organisations need to be in many places online, not just in their own 'home' site. Thirdly, projects and programmes change rapidly, and it doesn't make sense to invest large sums in sites that may not be appropriate in a couple of years.

The leading social media agencies like [Headshift](#) now advise non-profit clients to look at the lower-cost options for sites first. The Landscape Institute wanted to add a social network to its main site, for its world-wide professional membership. Instead of commissioning an agency to do the work, Paul Lincoln, the director of policy and communications, used the free commercial system Ning to create [Talking Landscape](#). Your ability to budget for use of technology depends very much on how much you know about what's out there, and also how exact your requirements are. (See the section on [Building the](#) <sup>[7]</sup> [technology](#) <sup>[7]</sup> for more on this.)

Although external software and technical development costs may be much lower, you will still need to budget for the people costs (see [Building the team](#) <sup>[7]</sup>). The difficulty here is knowing how large or small the task of engaging and supporting your community will be. Fail to engage your audiences and you could have technical and community staff sitting idle; but a big success could overwhelm your small team. Budget initially for staff time to grow the community proactively – contacting people, posting content, testing and refining the software – and then create scenarios for different levels of success and growth. Set **trigger points**, such as hiring a part-time [community manager](#) <sup>[2]</sup> when you reach 1000 users, hiring a [technology steward](#) <sup>[2]</sup> when you get above five tech support calls a day, etc. Budget for unpredictability.

It's hard to know how much money you really need, so it may actually be better to begin from the opposite direction. Innovation projects are always risky (and all new technology projects are innovation projects); so instead of working out how much you need to make it happen, a smarter approach is to ask what value the project has to your business. How much is it worth spending? How much can you afford to lose if it doesn't work? Start from there and you will be able to find some way to introduce technology within the budget you have available. If you spend a large amount of money there is a lot of associated pressure to 'make it count,' so by spending less you buy yourself the freedom to experiment. Tailor the budget to fit the business needs and not the other way around.

## **Keep your powder dry**

All too often, technology projects are seen as just that: a mission to build or implement a tool and then send it out into the world. The biggest mistake you can make when structuring your project is to spend all your money on the technology and leave nothing in reserve for promoting it and attracting users, refining it based on user feedback, and looking after the community you have created. And if you know exactly where all of your time and money is allocated, you have no way to respond to unexpected turns of events, good or bad.

1. Budget several times more for people than hardware and software.
2. Set aside at least a third of your budget for design, copy and user testing, and a third for marketing activity and community engagement.

Structure your project in phases, and review carefully after each phase to see where you can spend your resources with most impact. You will quickly find that things don't work out as you expected, and you'll need money and time to respond, support what's working and minimise any problems. Try to run a short pilot phase first, or a public prototype, and then build on that. Focus on the quick wins and low-hanging fruit at first, and keep shifting the lower priority or higher difficulty tasks into later phases. Give yourself realistic short-term targets, set new objectives for each phase, allocate a few more resources, and move forward step by step.

# **Engaging the community**

Involving people from the start to create something they actually want

- how to get to know the people you are hoping will use what you're building
- why successful internet projects usually involve getting people face-to-face
- what happens when you design things around your users

One of the most important lessons from our case studies and elsewhere is that the key to a successful ‘social by social’ project is close engagement with users and stakeholders. Engagement is not an add-on – it should be fundamental to your business model, technology design, marketing strategy and evaluation processes. Build it and they may well not come. Build relationships and they probably will.

In this noisy ‘information age’, the biggest challenge has become attracting people’s attention. The web in particular is an interactive medium, which means people make conscious choices about what they read and watch online. Push marketing is therefore ineffective as users will simply avoid content they are not looking for, or that is not ‘useful’ to them. User tolerance for irrelevant content and functionality is plummeting, and the need for a clear understanding of what users want to do on the site, and for providing consistently relevant information and services, are paramount to building successful online content. Usability and user experience are still important, but so too is the need for ‘usefulness’ – having tangible functionality and valuable content that people can make use of in their lives.

By far the best way to ensure that the platform you build will actually be used by your target audiences is to involve them in the process of creating it. Involved and engaging users and stakeholders from the start makes it easier to create something that they value (because you don’t have to guess what they need, they will tell you), and also gives you a ready-made army of evangelists to promote it after launch.

## User-centred design

User-centred design means involving users in the development and evolution of your tools, to take account of their needs, desires and limitations whilst you make it. You may think a new feature is brilliant, but they may disagree, or simply be unable to use it for some reason. Allowing your thinking and design work to be led by user feedback is the only way to be sure that you are building something people will actually use.

The International Standards Organization ([ISO 13407](#)) outlines four essential activities in a user-centered design project:

- Requirements gathering – Understanding and specifying the context of use
- Requirements specification – Specifying the user and organisational requirements
- Design – Producing designs and prototypes
- Evaluation – Carrying out user-based assessment of the site

[Ruralnet](#) used online and offline prototyping and user engagement techniques in an open process to develop the online systems that supported their community’s activities. They set up a website where they invited people to contribute ideas for development of their business, then held a focus group day, and from that developed systems to prototype and test. The process of co-design started before the technology was scoped out, and continued long after it was launched.



London-based user experience firm Webcredible has [a great list of user-centred design techniques](#) that you can try, whilst organisations like Flow Interactive even use [ethnographic research processes](#) to understand the needs and aspirations that users can't articulate.

Don't get too bogged down though: the most important thing is to spend time with your users and really get to know them, and keep on trying out the tools with them throughout the development process. In the early stages of the project you'll mostly be talking to users and holding general conversations about what they need. As your tools and community develop, there's much more you can do to [evolve the technology](#).

## Engaging your future users

Developing technology strategies for any group of people can be very complex and difficult to get right because so many interests may be involved in the success or failure.

The approach that you take to identifying and reaching people that you will interact with online depends on what you are trying to achieve, and the way you aim to go about it. For example, if you are offering clear-cut products and services you might take a market research approach to discover more about people's needs and what your 'audience' or 'customers' will pay or otherwise commit. On the other hand, if you want to build an online community you need to find and cherish those champions who will work alongside you, contributing content and recruiting others. In that case, you need to draw upon engagement techniques rather than market research and marketing expertise.

Target those using the tools or involved in your services first: whether they are staff members, board members, volunteers, or community members. They already have a connection to the project and will have the best opportunity to see the potential uses for these tools. Seek out people who are already using digital and social tools too, as they will be able to see more possibilities and suggest what you might build for them. After that, seek out those using your services or otherwise engaging with you but aren't online to see what barriers they are currently facing and how your organisation's use of technology could be open to them.

Some design processes include profiling users, where the designers invent profiles of typical users, their web habits, communication preferences, what they want and need, and even demographic and personal information. A quicker way to achieve some of that understanding of your users though is to identify real people who you want to reach, and base the project around them. Select a few people who represent the broad types of users you are seeking (how you divide them depends on the project), and invite them in, interview them, write up their profile and wants and needs, and then keep involving them throughout the process as [user champions](#) <sup>[7]</sup>, critiquing designs, testing new features and so on. That way, you know you are designing for real people, and if you build something they like there is more chance others will like it too.

How many users you choose to involve depends on the size of your target audience, the



practicalities of getting people engaged, and the amount of time and money you have to spend on engagement. Over 90 local people from all walks of life took part in developing the specification for [Talk2Croydon](#) <sup>[7]</sup>, mainly through focus groups and interviews. Other projects consult a few key stakeholders and involve them closely in the design and development process. Some people will commit more time than others, so cherish those early champions while ensuring you check their preferences against those of others. In addition, be prepared to review your expectations of what will interest people against what actually does during development, provided you don't lose track of your overall purpose.

The techniques that you use should also reflect your aims and approach, and how many people you need to engage. User interviews, focus groups and even large stakeholder workshops all work well for capturing user opinions, but if you can't get people together physically there are other options. User surveys (ten questions maximum please) are a good way to get some feedback on your ideas and your users' desires. Online engagement might work well for some groups of people, and even if you do run events too it's always a good idea to have an open discussion space and an e-mail address where users can engage with the project. A project blog can be a very effective way to run online engagement, as can discussion forums for more established projects.

Talking about what people might, should or will be able to do isn't very interesting. Get staff members and others playing with the tools, and then talk about what people are already doing. Those experiences and direct examples are much more compelling for new users.

Don't forget about video and photos too. Interview users and share the footage publicly to show that you are listening to people and valuing their contributions. Get someone to interview you too, and put that online to show that you're a real person and help people understand what you're doing. Seeing someone on video really helps to build trust in them: you can see their body language, levels of emotion, get a feeling for who they really are. A lot of that important human stuff gets lost when you're just reading someone's words on a screen. (Here's more on [how to shoot and upload videos](#) <sup>[7]</sup>.)

Use any opportunity you can for conversations and co-design exercises. Your ability to reach people and get them to respond though depends less on the tools you use and more on whether you have good relationships with them already, and understand what they are interested in. This is where [getting into the](#) <sup>[7]</sup> [conversation](#) <sup>[7]</sup> early pays great dividends. The more you listen, the more you know – but also the more opportunities you will find to engage people in your project.

## Using events to build engagement

Engagement depends not only on aligning objectives and providing an attractive service, but also on building relationships with all the people involved. That's best done sociably ... and the best possible way is to run an event. That could be through an online conference – like those run by [IDeA](#) <sup>[7]</sup> – but even better is meeting face-to-face.

Well-facilitated events help your target users feel involved, and give them a chance to get to know you and what you're trying to do. Get people together in a real space, and let them talk. Guide their conversations so that they understand the objectives and limitations. You can make sure that diverse groups of people are excited about being actively involved in a process, engage people who don't necessarily go online as well as those that live and breathe it, and ensure what you build matches everyone's needs and abilities.

Events can also provide a good way for people to explore social technologies. Starting a simple blog for an event, and then engaging people with video and other tools can be a good way to show the power of these tools. This approach worked well for Digital Unite at their [Silver Surfer Awards Day](#). The blog generated a lot of commenting and content from people outside the core team, and follow-up work and events towards a European online community of practice also led to the development of this [social reporting toolkit](#). Online tools work much better if some of the people engaging via technology have met each other in the flesh, otherwise you can create a community of strangers.

The community development toolkit [Xchangelab.org](#) uses a combination of open source Drupal tools and face-to-face techniques to engage users with the technology as it is developed. They used this methodology successfully on [Talk2Croydon](#) <sup>[7]</sup>, [RSA Networks](#) and [New Media Exchange](#) to gather input from users, prototype concepts cheaply, and get people using social tools in the project development process itself to show them how they work.

Another way to help a group think through their choice of tools and specify what they need from technology is by 'paper prototyping' a possible system using a workshop 'game'. The [Social Media Game](#), developed in 2006, uses cards and scenarios to get groups thinking about their technology options. Ruralnetonline [used this game](#) in their collaborative design process. We've evolved a longer version based on this handbook, the [Social by Social Game](#) <sup>[7]</sup>, which brings marketing, user engagement and business factors into the mix too.

## Building the technology

How to deploy these tools without losing sight of your goal

- how to choose the right tools for the job
- when too much efficiency can be a bad thing
- how to get the best out of free and cheap tools
- why the words you use can be more important than the software
- how to design a homepage for your site

Hopefully by now you've got a clear purpose, understood the context and people involved, structured your project in an effective way, and got to grips with the conversations and the way these tools work. Now is the time to educate yourself about the new technologies out there, and make a choice about what you need.

Your ability to deploy appropriate technology depends on three things:

- The clarity of your understanding of what your users need.
- The resources and skills available to you in implementing solutions.
- How much you know about the options available to you.

There are now so many tools out there that it is possible to run a successful technology project without ever building new software or writing a line of code. It's happening anyway: just relax and let the technology come to you. Knowing what's out there already can save you a fortune in time and effort, and allow you to focus on the things that matter: how the technology can be used, the things you want to change, and the people you want help.

## An art, not a science

The key to deploying successful technology lies in concentrating your resources on turning the bewildering array of tools into useful, appealing services that people will understand and enjoy.

The most important thing to remember when working with technology is that you are building a human system, not a machine. Technology can be used to speed up processes which are currently inefficient, or enable us to do new things which weren't previously possible. But people aren't mechanical, and chances are they will be looking for more than cold, hard-edged efficiency.

Peter Brownell, developer of Talk2Croydon and Intelligent Giving and Co-founder of Code Positive and School of Everything, sums it up like this:

"Programming has been analytical, a bit obsessive and interested in efficiency and utility. Software has evolved from hardware, from the sharp edges of the machine. Although interface and user experience has always been a factor, the objectives have been functional allowing rational, deductive logic to define priorities.

Soon, the technology will fade into the background and cease to play a major role in how software is created. When software is defined by users, rather than technology, a whole new set of skills are required. Humans are complex, their interactions rarely follow logical patterns, and small 'non-essential' bugs/features can have massive impact. When the aim is to facilitate the development of relationships, a developer will need to pay careful attention to emotional issues."

Focus on functionality and features, but don't lose sight of your overall purpose: to engage real people in real life activities. You can solve information problems and help people organise things, but unless people are connected emotionally to your tools, they won't make full use of them.

# The technology layer cake

When we talk about ‘building technology’ we are actually talking about three distinct activities which need to work together if the end result is going to be usable and effective.



When people used to talk about new technology projects, they were mostly talking about the developing ‘tools’ – new technologies to make new things possible. A few years on, there are so many tools out there that the challenge has become how to put what we have to good use. Yes, there are situations where you might need to build a new piece of software to do something that’s never been done before; but rebuilding tools that have already been built is a waste of valuable resources that you could be using to make good use of what’s around you, and provide a valuable, satisfying experience for your community.

## What are your options?

There is now a proliferation of free or cheap web-based tools available for individuals and businesses to help them collaborate, share information, promote themselves and manage their key business functions. In previous years these technologies have been too unreliable to risk running major business services from them, however, they are now proving more reliable than self-hosted solutions and offer excellent functionality to businesses at a fraction of the cost of developing something from scratch. If appropriate integration can be achieved between all the various tools available, then much of the

functionality of an enterprise-level website can now be leveraged for a few hundred pounds in installation costs. And their functionality is expanding all the time. Here are the basic options:

**Free.** Sites like [Facebook](#) [7] and [Twitter](#) [7] will let you use their robust, supported, fully user-tested platforms for free, because you are bringing them more users. They will find their own ways to make money later from the people you bring them, perhaps through advertising or paid-for additional services. [Colalife](#) [7] used Facebook, [Wordpress](#) [7], Twitter, and a [Google Group](#) [7].

**Cheap.** Companies like [Ning](#) [7], [Yammer](#) [7] and [Typepad](#) [7] ask you to pay a small subscription fee for their services, whilst others charge for pro services on top of their basic free offering. Again, they handle the support and hosting, so you don't need in-house technical resources. [SawvyChawvy](#) [7] and [TuDiabetes](#) [7] both used Ning.

**Customised.** You can license a proprietary package from a software vendor and pay them to customise it, but the smarter way to go these days is open source. Open source development means sharing what you build, which means you can start from a free core that someone else has built and adopt or evolve it. You get a tailored solution for less, and the more you share, and the bigger the community, the more you get back for free later. You have to handle your own development and hosting though, but it's usually much easier and cheaper to find people to help you. [Talk2Croydon](#) [7] commissioned their system from open source [Drupal](#) [2] developers.

**Bespoke.** The last resort. Building software from scratch is expensive, risky (unless you manage it very carefully), and can leave you at the mercy of those who build them for you. But if you can afford the time and money involved, you can get exactly what you need, and your competitors don't. [Patient](#) [7] [Opinion](#) [7] and [IDeA](#) [7] chose this route successfully.

Financially, the equation is straightforward: the more generic your requirements, the cheaper the solution. And often you can get more for free as an individual or community than you could ever construct from scratch as an organisation.

## Choosing tools

People often arrive at their choice of tools by a different route: [Colalife](#) [7] through a process of evolution based on the knowledge of those involved at the outset; [SawvyChawvy](#) [7] through the decision of the managing agency and consultants; [Talk2Croydon](#) [7] by commissioning consultants on the basis of a recommendation. The context you're working in, and your own skills, will determine how you choose your options.

If you're planning a major project, such as one that uses organisationally significant resources, will be costly to switch to, or requires significant changes to how many people will work, then it is probably worth investing in a more rigorous software selection process. But Laura S. Quinn, the Founder and Director of [Idealware](#) which

provides software reviews for non-profits, offers [a stripped-down process for choosing software](#):

1. Quickly define your top needs
2. Check if you can do it with the software you already have
3. Get a sense of what other people are using for similar needs
4. Pick a package that sounds promising
5. Run the package through some scenarios
6. Decide if the package is good enough

Manny Hernandez of [TuDiabetes](#) [7] looked for a cheap and easy to use platform for a discussion area where other diabetics might share their experiences and practical tips, and quickly found that [Ning](#) [7] would do most of what he needed. Many of the stories in our case studies and beyond involve people making use of the best-fit technology out there and spending most of their time talking to people and making what they had easy to use, and not on spending months building more and more complicated specialist tools.

If the software is cheap and easy enough to deploy, you can run it through some real-life trials with users. Consider using free or low-cost tools to experiment, rather than going for new build. If they work, you may be able to continue to use them; but either way you learn a lot at low risk. As one option, consider whether you really need ANY new technology. Can you achieve your goals by creating presence in spaces and communities that already exist? It's always better to build too little than too much.

## Design for your users

These tools allow all kinds of new things, but don't get too carried away. It's about what people will feel comfortable using, and whether it helps them do what they actually want to do.

Some technology will be intuitive for your users from the outset; others will require preparation, the right context or even training. [YouTube](#) [7] is a cheaper, more far-reaching way to broadcast video, but [book/companion](#) [7] still felt a DVD would be appropriate to get the message out to their community. And if you want people to make videos, you may need to supply equipment and training unless they are already producing videos for themselves. Don't expect people to use online collaboration tools like [Genesiswikis](#) [2] unless they are familiar with the tools, comfortable with the rest of the group, and very clear on what they are trying to do. Tailor your technology to fit the skills and mindset of the people you want to engage – otherwise your first task will be to persuade and even retrain them.

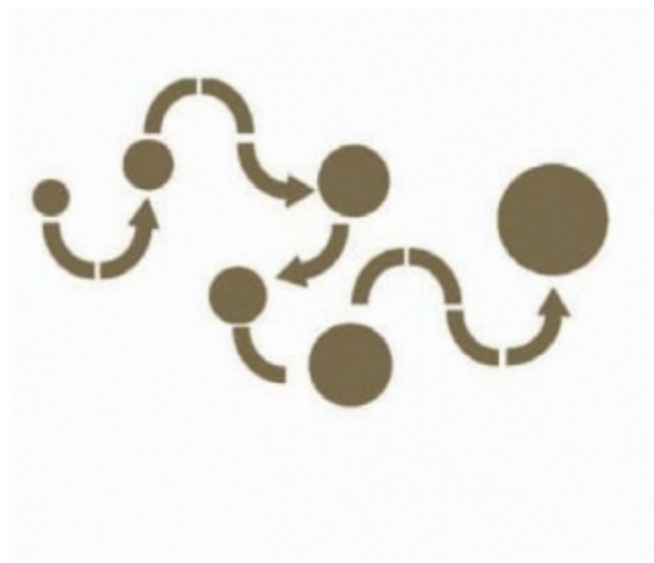
Get to know what technologies your users are familiar with already, and build on what they know. You should have a clear idea of who your users are throughout the design and development process. Create sample profiles of your key types of target user, outlining their likes and dislikes, how much time they have, how often they use

technologies and what kinds of technologies they're used to, what they trust and don't trust. Better still, use actual people as your sample users: profile them and get to know them, but also ring them up and ask them questions, show them screen designs, find out what they actually think of your system. You can save yourself a lot of grief and expense later if you take a bit more time to engage real people in the development of your platform.

You should also always have a sense of the real activities your users will use your tools for – what they will do with the technology, and where these actions will fit into their lives. You should have clear 'use cases' – narratives for what a user will do with your site and what your site will do in return – outlined before you start designing the software, so that you can focus on making the practical paths your users will take through your platform as smooth and satisfying as possible. Even if you are considering your users, if you aren't considering what they'll actually be doing then you will build something that doesn't help them achieve it.

## Work in iterations

As Chicago software firm 37 Signals say in their excellent book ['Getting Real'](#): *"Don't expect to get it right the first time. Instead of banking on getting everything right upfront, the iterative process lets you continue to make informed decisions as you go along. ... You don't need to aim for perfection on the first try if you know it's just going to be done again later anyway. Knowing that you're going to revisit issues is a great motivator to just get ideas out there to see if they'll fly."*



If you build or deploy things your users don't need, you aren't just wasting your time, you're wasting your users' time too. How many times have you found yourself wading through unnecessary content and features looking for the one thing you want to find? Streamline your platform by asking users what they need first, and then showing them as much as you can before and after you deploy it – preferably with formal user testing.



Don't try to do everything at once. Give yourself the space to bite things off piece by piece, solving little problems with lightweight technologies and adding to your feature set incrementally. Your project structure and technology strategy should be designed to give you the flexibility to break problems down and part-solve them wherever you can.

Getting everything right all at once is an impossible task. The trick is not to try.

## Remember the 80-20 rule

In most projects, and particularly ones aiming to work with large groups of people, 80% of the value will probably come from 20% of the functionality. You can spend weeks refining and adding features to your technological offering, but chances are it will be 20% of what you've built that actually gets used regularly. If you can identify the core features which your community like and concentrate on making them simple and effective, you can save yourself a lot of time and money. And don't throw out useful tools because of unimportant details: see if people like them first and then put your energy into the ones that work.

If you aim to spread your appeal to a wide range of users – and also engage the busy power users – you need to make your service as easy to use as possible. Mark Barratt of [Text Matters](#) says: “What we have learned from early testing of [KnowHowNonProfit.org](#) is that naive users find it very hard to conceptualise wikis, blogs, bulletin boards and so on. Result: confusion. So we've simplified and unified. [Users want] an interface that is simple, consistent and avoids jargon. These steps and some subliminal colouring help the new user to learn quickly where they are and what they can do there.”

Beware of specifying costly systems until you are absolutely familiar with the tools and know how your users are going to use them; and beware of adding more and more features to your platform in an attempt to add more value, because you may just be making the most valuable features harder to find and harder to use.

## Choose your words carefully

It is very easy to get distracted by deploying more and more technology, but most websites are unusable or unengaging because of copy and design issues, not lack of features. The web is a crowded place and most people only give their attention to things they really need. The reputation of a site or author, or the usefulness of a tool, can get you attention, but the easiest way is to write clear, engaging copy that your target users will recognise and understand.

First you must understand the language of your community, which can only really be done by listening and getting feedback (see [Getting into the conversation](#) above). Community sites in particular are all about creating a sense of ownership by the community, and the language you use is far and away the most important part of creating that. Get the tone and language right and people are much more likely to come;



get it wrong and you can alienate people very, very quickly. If you write it in someone else's language, or use loaded terms or alienating jargon, people will assume it's not for them.

Writing copy for a user-generated content platform isn't like writing a book, or even a corporate website. It lies somewhere between writing an after-dinner speech and labelling the buttons on a microwave: a mixture of warm humanity and transparent utility. Think about the words you're using to describe the things you have in the platform, and also how you refer to yourselves, your users and the overall project. Is it 'our site' or 'your site'? Are they 'members' or 'users'? Do they 'post', 'add' or 'create' content? Do you use the same words to describe the same things everywhere, consistently? Your language is a key part of the software, and it shapes and defines your community.

One final point: dummy copy is for dummies, so use real copy in your design mock-ups. Many designers have a bad habit of creating holding copy that fits their designs perfectly; good project managers and creative directors break these designs (and the technical team's code) by filling them with real content. Unless you can see the real words on the screen, in context, and preferably show them to potential users for feedback before you build anything, you have no idea whether your pages will work. User-generated content <sup>[2]</sup> sites should never look like a glossy brochure: they should be messy and engaging, like the guest book of a hotel. Don't aim for perfection; you can't control what people write, so design around that.

## How to design a homepage

by Colin Tate

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*Colin Tate ([www.colintate.com](http://www.colintate.com)) advises companies across several industries on how to improve their web-based businesses, and provides organisational and strategic consultancy to the commercial and non-profit sectors.*

A homepage establishes the identity of your site, explains your principal message and draws the user into the path(s) you want them to pursue. It usually needs to serve the objectives of several different individuals, so the key to homepage design lies in resolving these competing priorities and delivering a coherent experience to the user.

1. List out a small number of core, measurable goals you want the homepage to fulfil, decide on their relative importance, and work solely to these goals. If you overload your page with too many goals, none of them can easily be reached.
2. Plan out use-case scenarios <sup>[2]</sup> for each of the goals of the site. How does the page work for each case? Does the page need to change in certain conditions to target new goals after the primary goal has been achieved?
3. Consider the types of users <sup>[7]</sup> you want on your site - their characters, backgrounds, needs and curiosities - and tailor your content and design to suit them. For example, less content is usually better, but for an older age bracket - say 55+ - depth of content improves user conversion.
4. Keep it simple. A homepage isn't a place to convince people of your argument or

explain complex concepts, it's about helping the users do what they came here to do. Keep the options clear. Homepage visitors should know within a split second what their next action is, and how to do it.

5. If you need to 'sell' something to a user, do it indirectly. For example, colours and diagrams can explain complex ideas and draw users to the next action quickly. Group reinforcement can also be really effective, so try to show new users examples of other people doing the actions you want to encourage.
6. Use the space wisely. Define an internal process for resolving internal conflicts during the design process and afterwards, and manage the decisionmaking process carefully. It's also good to build in criteria for what would trigger a re-design of the page.
7. Keep your meetings on homepage design short. Hours can be lost discussing whether a button should be curved or not. Yes, this can have an impact, but it's not worth navel-gazing. Don't be afraid to call time and move on.
8. People in a meeting room can guess what will work, but it's much better to let your visitors tell you what works and what doesn't. Use free tools such as [Google Optimizer](#) [7], or if you have the budget, bring in a fully-fledged [MultiVariate Testing](#) [2] solution to analyse how people respond to different versions of the homepage.
9. Don't be afraid to change your goals, and your page. Managing internal politics may come to play here, but changing your homepage helps to engage returning visitors and potentially re-attract users who did not 'convert' initially. A static homepage that changes infrequently loses its value over time.

## see also

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- Social Source Commons is a place to share lists of software tools that you already use, gain knowledge and support, and discover new tools. It's a place to meet people with similar needs and interests and answer the question: what tools do they use?
- The Non-profit Matrix is an online directory and guide to Application Service Providers (ASPs) and portals offering web-based services for non-profits and charities.
- Idealware, a 501(c)3 non-profit, provides candid Consumer-Reports-style reviews and articles about software of interest to non-profits. Through product comparisons, recommendations, case studies, and software news, Idealware allows non-profits to make the software decisions that will help them be more effective.
- Study: 68 percent of IT projects fail. According to US research in 2008, success in 68% of technology projects is 'improbable.' Poor requirements analysis causes many of these failures, meaning projects are doomed right from the start.

## Things get real

## Launching and evolving the tools, and recruiting and retaining users

- why you should think twice about organising a high profile launch
- how to attract new users to your site
- how to look after the users you already have
- why only a small proportion of your users are likely to be active - and why that's fine
- how to improve your site now it's being used

The launch of a project is just one step in the process of engagement, not a big bang at which everything is unveiled and the marketing begins. There are a lot of advantages in building your support gradually, while testing and evolving your online systems as you go. You will probably be under pressure to provide good usage figures quickly though, so in the early stages you will probably need to try every technique available to you to get people looking at and joining in with your community. It's about getting a good balance between attracting new audiences, and looking after the community you've already got.

For a quick primer, Alexandra Samuel and Rob Cottingham provide [the elements of an engagement plan](#), and there are also some good ideas from Mark Hayward on [how to create a social media & online marketing plan](#).

## Attracting users

There are a lot of empty websites and unread blogs out there. Don't fall into the old trap of "if you build it, they will come," because chances are they won't. Acquiring users is about offering something of real value and making sure that the people who matter hear about it. So once you've built the community platform of your dreams, how do you actually get people to visit, use and contribute to it?

The first point should be obvious, but often isn't: go to where people are already, as [Colalife](#) [7] did. Use the tools and communities they use, and choose communications media and technologies to fit the audience, like [Genesis](#) [7] and [FreqOut](#) [7]. Don't expect people to change their behaviours for you, design your strategy to fit what they're doing already. Engage in the conversations, online and offline. Make sure you have a voice anywhere that your target audiences are paying attention to, and that you're talking in a way that matches their values and assumptions.

Create valuable content: whether it's your own team generating it or your users, if you have things people want to watch and read then it's much easier to get people's attention. Create news: time-specific events, stories and commentaries on public events can get you press and blog coverage, while face-to-face events give people a reason to write about you, and a reason to check out your platform afterwards. Let your users help you promote all this content too: the best commercial sites market themselves by encouraging users to create and share good content themselves. Sites like [eBay](#), [YouTube](#) [7] and [Twitter](#) [7] rely on individuals promoting the content they've created, and so promoting the sites in the process.

Search engines are your main source of large-scale traffic, so don't neglect them. Tiny

changes can make a huge difference, and so can knowing what search terms you want to rank well for. And being in the top three for Google's key terms is a completely different experience from being in the lower rankings. Getting lots of links to valuable content you and your users have created can be a smart way to push yourself up the Google ranks.

You have a great advantage if your project actually creates change in the real world, because that means it will create great stories that you can tell others. Talk to your users, find out what they're up to, and tell those stories to encourage more people to join in. Your role in collecting and publishing their actions helps turn their isolated activity into a social movement which others want to be part of – and helps new visitors understand what they are supposed to do.

When people do visit, give them little ways to engage. 1% of registered users will be active; perhaps 5-10% will visit regularly; the rest will just come to watch, or perform one function. And that's fine. Be realistic, and support each segment. And bring people back, with e-mail updates, recommendations for them, notifications of activity of interest to them. For example, if someone leaves a comment on an article, make sure you notify the author and bring them back into the conversation.

## **A marathon, not a sprint**

Prepare yourself for a long process of seeding, growing and weeding your community and watching it slowly take root. After the first initial burst of publicity and activity, you can expect your user figures to drop quickly and then slowly begin to rise again as you tune, refine and promote your offering. People take a while to adjust to a new technology and see where it fits into their lives. The growth curves for community sites are notoriously unpredictable (start-ups talk about the 'hockey stick' where slow increases suddenly become massive rapid viral growth) but if in doubt prepare yourself for a typical 'web 2.0' adoption curve like this:



Working with small groups of people is a good strategy for handling this: prove that it works for a core user group first, and then you can be more confident of scaling it later. Don't set impossible targets for scaling your community quickly: give yourself some room to change things, talk to people and build momentum and attention slowly. (More on this later when we discuss What to measure <sup>[7]</sup>)

## Taking care of your community

Look after your community and they will look after you. Cherish the people who are using your tools and engaging with you, even if they aren't your main target audience. Serve your community well and they will help you reach the people who matter.

Investment in relationships, training and emotional support, is more important than investment in technology. Teach people the skills they need, and show them that they are important to you, and they will make allowances for the imperfections in what you offer them. Identify and support the emerging leaders too. They may not be the obvious choices. Savvy Chavvy found the offline community leaders and the online leaders were very different people – and it was important to connect with both at different stages of the project.

You can't predict what people will want to talk about. Talk2Croydon wasn't created to help kids discuss their homework, but at least they're there, talking and listening. Savvy Chavvy wasn't built to promote flirting and socialising, but these activities serve to strengthen the community and make it easier for people to discuss serious issues. Respect people's 'misuse' of your platform, and their need to socialise to form good online relationships.

The best way to influence the community is to be part of it. Get stuck in, create content, use the tools and join the conversations. Condition the space by your behaviour in it. You can also tell stories from the community to reinforce what you want it to be. Promote the people and activities that you want to encourage and show that you are listening (this is also important in growing your community).

Customer service is crucial: if users know there are real people who care at the end of the phone or e-mail, they will trust you and your platform so much more. Don't create an impersonal relationship between them and your platform; make yourself easy to reach, and talk to your users all the time. They'll tell you what they need anyway and save you a lot of time prioritising your work. And remember, every time two people complain about something, that probably means there are 50 people who feel the same but didn't want to mention it.

Above all, build good relationships with your users, get to know their needs, listen to what they say, and watch what they are doing. You should always know who your most active users are, and they should know you too, and feel they can talk to you; take their suggestions seriously and be as responsive as possible. Make your users part of the team.

## How to manage an online community

by Jenny Reina, Freelance Community Manager

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*Jenny has helped organisations including School of Everything <sup>[7]</sup>, BBC, Disney and ABC set up and look after online communities and user-generated content. Most of her work currently revolves around eModeration and its clients.*

- Decide what you want to achieve with your forum, message boards, comments or other user-generated content.
- A community manager or host can help develop and maintain a thriving community by setting the tone, seeding new message boards and maintaining healthy discussions and contributions.
- Consider the community's legal terms and conditions – look at other websites for good examples that can be tweaked to your own needs and get them checked by a lawyer.
- Create user guidelines – a friendly version of the terms and conditions so people understand how they should behave. These guidelines may need to evolve as the community develops and a FAQ/Community Help section can also be useful.
- Decide whether your community needs to be moderated. If so there are three main options: pre-moderated (posts checked before they appear on the website) post-moderated (posts checked when they are already live) or flag moderated (encourage users to flag inappropriate content for moderation).
- If you are relying on the community to self-moderate make it clear this is the case and it may be worth stressing to users that the live nature of the community makes it difficult to verify the validity of content posted.
- It is useful to have a clear policy on links to other websites. Bear in mind that links

to inappropriate content could impact on your site's brand/reputation if they are not checked.

- To moderate text/video content you need to be able to understand what people are saying so state clearly in the guidelines which languages are permitted.

## Evolving the platform

Once the platform is ready for real users, you have two new methods available for working out what to build next. Firstly, you can watch what your users are doing on your platform by engaging with them personally and monitoring the right statistics (more on this later). Watching how people are using your platform allows you to see whether your assumptions were correct about what they would find useful: are they using the features you thought they would; which parts are they not using, and why; and are they using it in new ways you didn't expect? And secondly, you can ask people on the platform what they think about it via online feedback systems, e-mail surveys and public discussions using your own tools. Make it as easy as possible for people to tell you what they think, and then publicly act on their requests to show you care.

You can also conduct user testing to check the effectiveness of what you've built. User testing allows you to watch real users using your platform for the things you'd like them to use if for, and evaluate how effectively you've met your objectives. There are very sophisticated methodologies and technologies for evaluating website usability, but you can do the basics yourself and learn a lot quickly. With even a small amount of user testing you can quickly iron out small but critical features like invisible buttons, unclear terminology and confusing workflows, and transform the usefulness experience of your tools for your visitors.

At this point you'll be very glad that you engaged your users from the start <sup>[7]</sup> (you did do that, didn't you?), because you'll already have an engaged community to shape the development of the platform. Keep evolving your platform with your users, particularly responding to specific requests – but be careful not to break the things that people like in your enthusiasm to add more features. Be fast and loose with evolving your platform in the early stages, but be cautious of changing things once people start using them. Collect and prioritise feedback, watch what's happening, hold on to what's working, and make small improvements in consultation with your users. And be prepared to put things back if you make a mistake!

Respond to technical concerns and complaints quickly too (see [Taking care of your community](#)), in public if possible; keep track of bugs and feedback in tools like [Mantis](#) or [GetSatisfaction](#) <sup>[7]</sup>, and act quickly to fix prominent bugs and obstacles to show that you're listening to your users' concerns.

### How to run user testing on your website

by Andy

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1. You don't actually need a fully-developed tool or website to start user-testing; you can test prototypes, functional wireframes and even screen designs for language, layout and logic, and get what you build right first time.
2. You do however need a clear sense of the tasks you want to test for. Write out 4-6 tasks in a form that a user will understand, which represent how you'd most like your site to be used. For example, 'You've heard that the Social by Social publication contains information about user testing. Go to the publication online, find the relevant section and cut-and-paste it into an e-mail.' Tasks should be achievable, with a clear definition of what completing them means.
3. Ask a user to come in for 30 minutes to help you test your system. They could be a regular user, or someone who's never heard of your project, depending on who you want to focus on.
4. Explain the basics to them, including: asking for permission to record the test in some form; explaining that it is the technology under scrutiny and not them; that they should be encouraged to think out loud to help you understand their motivations; and that if they get stuck you won't help them immediately, but you will answer questions at the end.
5. Give them the tasks on a clear printout and read them out to them, and allow them to find their way through the tools and complete the tasks for themselves.
6. Watch and make notes of anywhere they get stuck, and anywhere they don't get what they were expecting. You should also make notes of their exact quotes when they say anything really significant, as these are very powerful for explaining the results to your colleagues. (It might be easier to have a colleague making notes while you take care of the subject.)
7. For each of the tasks, you are assessing your system's performance for efficacy (whether the user completed the task), efficiency (how long or how many clicks it took them) and satisfaction (how they felt about the overall experience). Make notes around each of these things and give each a score if you want so you can monitor progress later.
8. You may want to record the test and show it to colleagues or review it at more length later. Use a recording package like Silverback to capture screen activity, vocals and user reactions.
9. Once the test is complete, you may want to reward or even pay your subjects, or maybe not; but either way, remember to thank them.
10. If that all seems too complicated, you can outsource the whole process to strangers in the US by submitting your website (for a very small fee) to [www.usertesting.com](http://www.usertesting.com).

## Dealing with inappropriate content

by Jenny Reina, Freelance Community Manager

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*Jenny has helped organisations including School of Everything, BBC, Disney and ABC set up and look after online communities and user-generated content. Most of her work currently revolves around eModeration and its clients.*



- Deal with inappropriate content by editing the post or removing it completely as soon as possible.
- If you step in to remove or edit content refer the user back to the Community Guidelines or Terms & Conditions so they know why. You can replace the removed/edited content with a post explaining the action was taken because the content violated the community user guidelines/T&C.
- Decide how you will deal with people who violate the guidelines/T&C. You might want to introduce a 'three strikes and you're out' policy towards repeat offenders, enforcing a temporary ban for a set period of time or a permanent ban.
- Recording deleted content is sometimes useful in case it is queried at a later date (especially if more than one person is scanning/moderating the community). This kind of reporting can be built into a moderation admin tool or details can be recorded manually e.g. on an Excel doc, but this is more time consuming.
- Remember that if you see any child sexual abuse content hosted worldwide or criminally obscene and incitement to racial hatred content hosted in the UK it should be reported to the Internet Watch Foundation.

## Sustaining the project

### Building a funding model that works

- why the internet is changing the way organisations fund themselves
- how internet businesses work - and what non-profit organisations can learn from them
- how your users can help you make your project sustainable

One of the great attractions of the online world is that it seems to be free. Many of the tools can be downloaded without charge, there are vast resources to be searched, read, and transformed again without charge, and the ethos of much of the Net is collaborative. People will share and help each other. Some of the free tools are there because their developers believe software should be free; some because the developers want to build a big user base to whom they can sell something else; some because costs are covered by advertising revenues or deals with linked partners.

Other online services have to be paid for though, in a variety of ways. And even if the tools are free, you will have invest a lot of time not just in getting started, but also managing technology development and in facilitating or contributing content. These costs have to be paid for in some way – either by revenue, funding, or the contribution they are judged to have made overall to the organisation. Even where volunteers or service users contribute a lot of content and support, some paid-for management may well be needed.

If you can find simple ways to make your project sustain itself, you will make things much easier for yourself and reduce the risk of having to close down a successful service just as people are beginning to derive real value from it. If you are offering something valuable to people in the real world, there should always be some way to pay

for it.

## Online business models

Professor Michael Rappa has analysed commercial business models, and writes:

“In the most basic sense, a business model is the method of doing business by which a company can sustain itself – that is, generate revenue. The business model spells-out how a company makes money by specifying where it is positioned in the value chain.

“Some models are quite simple. A company produces a good or service and sells it to customers. If all goes well, the revenues from sales exceed the cost of operation and the company realises a profit. Other models can be more intricately woven. Broadcasting is a good example. Radio and later television programming has been broadcasted over the airwaves free to anyone with a receiver for much of the past century. The broadcaster is part of a complex network of distributors, content creators, advertisers (and their agencies), and listeners or viewers. Who makes money and how much is not always clear at the outset. The bottom line depends on many competing factors.”

Professor Rappa goes on to analyse [some classic online business models](#), some of which may be relevant to those developing start-ups or other projects for social change or public services:

- **Brokerage:** bringing buyers and sellers together, and usually charging a fee. (Ebay is one of the best known; School of Everything a more recent UK example).
- **Advertising:** extending the traditional broadcast model and charging for exposure to people ... or rather their eyeballs. (such as Yahoo, Google...).
- **Infomediary:** collecting data about online users that can be used for marketing, for example. (DoubleClick)
- **Merchant:** sales of products or services on list prices or through auctions. (Amazon, iTunes)
- **Manufacturer (Direct):** reaching buyers directly. (Dell computers).
- **Affiliate:** providing purchase opportunities not through portal but where people are. (Amazon stores).
- **Community:** attracting loyal users, to whom other services can be sold. (Craigslist).
- **Subscription:** charging users periodically for a service. (Listen.com)
- **Utility:** pay-as-you-go. (Slashdot).

Be creative in modelling how your project might generate money to sustain itself. Work out what your service really does, and for whom, and then align the revenue model to fit. Take the time to design a robust revenue model early on, or else the inevitable search for money later could take you away from serving your community.

# Business models for non-profit services

In order to ensure most 'social by social' projects are sustainable, we will need to evolve 'business' models appropriate to projects that involve advocacy, service delivery, development work or organising for change.

You may find some inspiration from the models identified above. However, it is difficult to translate enterprise models directly into social change models: the aims may be more diverse, the beneficiaries less able to use online systems, the reward systems different, the institutions (non-profit) different in their values and structures. That makes it all the more important to work through the design of a project from first principles, not adopt something off-the-shelf.

Some projects (like [Wikipedia](#) [7]) survive on donations from their large community, others from funding from trusts or public sources. If your community is large enough, donations can actually be a viable way to sustain a business – albeit not a completely reliable one. Some commercial web start-ups and software projects have survived on donations and [shareware](#) [2] licenses that allow people who value the service to make a contribution to its upkeep. Large sites like [Last.fm](#) and [Livejournal](#) survived in their early stages on selling very basic 'pro accounts', simply to allow people who liked the site to contribute to its upkeep. Make sure you give your community an easy way to help the project stay financially viable, and talk to them about what you need.

## How to build a sustainable income stream for a social enterprise

by Paul Hodgkin FRCGP; Patient Opinion

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1. **Income.** Identify your real and possible products or services, and decide which ones to focus on. Ask yourself who is going to pay for this service in the long term. It's easy to create something that will make the world a better place but which meets no specific customer's needs. So ask yourself realistically whether you would buy the service at the likely price. If the answer is no put it on the back burner.
2. **Costs.** When pricing always factor in core costs and 'profit'. These don't have to be accurate – as a rule of thumb use 20-25% for each on top of the direct costs of materials, wages etc.
3. **Cash flow.** Monitor cash flow like a hawk. Don't get too bothered about accountants and accountants till you really need them but do have an accurate simple spreadsheet that projects all your costs and realistic income and monitor this every week.
4. **Sell early, sell often.** There is nothing like going out to talk to potential customers to find out what they want and whether they are interested.
5. **Market development.** Customers often don't know what they want – so you've got to find their itch and then make sure your service really will scratch it. The more innovative your product the more time you will have to spend doing this.

6. Fail early, fail often. When you're doing something new, failing is much the best way to learn – so learn quickly.

## Challenges for non-profit organisations

New technologies provide fantastic opportunities for revenue-generation, but they also challenge and undermine many of the old models too.

Charities and other non-profit organisations may face challenges from new structures emerging online. For example, organisations that have relied on subscriptions from their members for newsletter, meetings and directories may find, in future, people getting much of what they need from social networking sites (more about this in [What this means for membership organisations](#) <sup>[7]</sup>). Charities who raise money in order to pass it on to smaller projects are being challenged by organisations who make direct connections between donors and beneficiaries. Non-profits who think they can improve their services by adding an online dimension may find that they are outpaced by social innovation start-ups.

Organisations who think their static web site may just need refreshing should think about whether something more fundamental may be involved. They need to consider a change in the way that they do business – just as commercial organisations have had to do. You may think you need a new website – but you might just as easily need a new business model too. Clay Shirky has given a couple of interviews with [Amy](#) and [David](#) about how non-profits need to respond to this.

## Don't confuse money with value

If your project doesn't have immediate or scalable ways of making money to sustain itself, that doesn't necessarily mean there's nothing in there that can help you. If the community is large enough, it may well contain the resources to sustain itself by voluntary activities and donations. Not everything needs to be run by organisations and paid for in hard cash. All communities rely on good will; they are all 'voluntary organisations'. So if enough people want the service to exist, how can you involve that community in sustaining itself?

Let the users solve their own problems. As the amount of work grows, so does the number of workers. [SavvyChawwy](#) <sup>[7]</sup> were able to harness the enthusiasm of the community to moderate content, control access to the network and stimulate conversations, meaning the network can now continue to be run by volunteers. The more you rely on the community for sustainability, the more you can keep focussed on what they need.

Of course, while there are many examples of online communities set up and maintained by enthusiasts, that's entirely different from a situation where a public agency or non-profit organisation creates an online system and hopes that users will

make it self-sustaining. If they don't 'own' it, they are unlikely to commit to maintain it. Online communities need online facilitators ... and they probably need to be paid.

So if you want the community to support the platform, be prepared to lose control of it. And if you need control, be prepared to pay.

## Rounding up

Evaluating projects, proving impact and learning from success – and failure

- how to measure the success of online projects in a meaningful way
- how to demonstrate what you're achieving to funders and decision-makers
- how to use the things you're measuring to make decisions about what to do next
- where stories can be more powerful than statistics
- what to do when you succeed and when you don't

In most social projects, it's not enough to succeed: you have to prove it too. Funders and supporters usually want hard evidence of what you have done and the 'impact' you have achieved. This can range from hard figures on usage and engagement, to softer stuff like testimonials from beneficiaries and prestigious awards.

### 'Return on Investment'

The key requirement for funders and project sponsors is usually evidence that the money they've spent has made an impact on the things they care about. Fair enough – but matching up funding objectives to the objectives of your community can be tricky. The best funders understand the needs of the community you're working in, and that beneficiaries should be free to reshape the services on offer. Finding funding that appreciates the human impact above the methods used to get there will make your life much easier when proving the value of your project.

There has been a lot of research on how to demonstrate return on investment within both social enterprise and online 'web 2.0' projects. The New Economics Foundation has produced an excellent report [Measuring value: A guide to Social Return on Investment](#), whilst [Beth Kanter](#) writes a lot on ROI for non-profits and online communities. The approach you take will depend very much on the specific context you're working in, and particularly how your funders or employers are currently measuring value. You may find yourself working within someone else's model, or you might be free to work out your own template.

Either way though, this is where having a clear purpose <sup>[7]</sup> and an understanding of who you're trying to help becomes crucial. Set clear, realistic objectives at the start, and the process of demonstrating you achieved them is much easier.

We'll leave you to research this complex and highly-specialised world yourself. Instead, we'll focus here on the specific things that make evaluating social technology projects

unusual: the massive array of things to measure, and the unpredictability of possible outcomes.

## What to measure

Technology is very good at producing new things to measure: the trick is knowing what to watch. Unless you're careful, you can quickly end up drowning in a sea of meaningless statistics, thinking you're making progress but missing the important trends and impact of your project. Once again, having a clear purpose for your project is critical; your task now is to turn that purpose into a set of key metrics that between them reveal whether you have achieved it.

What you measure about your technology will be determined by how you want people to use it. Do you want to engage a small group of people to do a range of things repeatedly, or a large group of people to do something specific once? Silicon Valley startup investor and entrepreneur Dave McClure explores these issues in his excellent presentation [Startup Metrics for Pirates: AARRR!!!](#) He suggests five areas of user behaviour that you can usefully measure:

- **Acquisition:** users come to the site from various channels (eg. new visitors per month)
- **Activation:** users enjoy 1st visit: 'happy' user experience (eg. 7% of visitors sign up)
- **Retention:** users come back, visit site multiple times (eg. 10% of users come back)
- **Referral:** users like product enough to refer others (eg. average user recruits 0.2 others)
- **Revenue:** users conduct some monetisation behaviour (eg. average value per user > £5)

Dave also describes three kinds of users: **visitors**, **contributors** and **distributors**. Put simply, visitors passively consume your content; contributors create new content; and distributors tell other people about your content. Depending on your project purpose and objectives, you'll need to choose which of these are more important to you.

For example, you could measure the number of unique visitors to your website (using a web stats package like [Google Analytics](#) [7]), but this might not mean much if your goal is to get people creating content. You could measure how many of those users come back, which might give you an idea of how much value people are getting from your platform, but that's not so useful if your tool is designed to help people perform a one-off function, like signing a petition. If your goal is to encourage awareness of a cause, you might be interested in [pageviews](#) [2] for your own site, but also references to your project elsewhere on the internet, or how many of your users invite friends to join your site. You can even measure how many followers you get on [Twitter](#) [7], or the number of mentions for your project in Google.

Agree a set of 5-10 **key performance indicators** (KPIs) that collectively indicate whether you are delivering on your objectives or not. Try to get a good balance of KPIs that measure: the scale of your impact; the nature of your engagement with users; the loyalty of your users; the speed of user growth; the utility and usability of key features of your site.

Make sure you set realistic levels for each of these, so that you have something to aim for that you are happy to share with staff, funders and project sponsors. Run them through a load of scenarios to see if they cover all the situations you'd like to know about, such as huge success scenarios, terrible failures, and those tricky bits in between where things may look like they're working but in fact you're missing vital parts of the puzzle. Get these KPIs right and it makes it much easier to set priorities for future activities, hold open conversations with funders, and feel confident that your project is progressing in the right direction.

Be kind to yourselves though: set conservative targets. Just because these tools have the potential to achieve huge impact doesn't mean they will. Slow and steady growth is fine, and you'll often get sudden jumps in usage without any indication why. There aren't any magic buttons to press: the more you put people in control, the harder it is to 'do things' to them and force progress towards your targets. The nature of these technologies means surrendering many of the obvious control mechanisms for making the project succeed.

Targets are useful if they motivate you and keep you focussed on what's important, but if they become a set of broken promises and impossible dreams, then you could feel like you've failed when really you haven't. Tailor your targets to fit what you can control, and focus on creating the right conditions for growth rather than forcing it to happen to a fixed timeline.

## Identifying metrics & measuring return on investment

by Amy

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1. Identify the benefits and values: create a list of your technology tools and online activity strategies, identify the benefits associated with each, and the value that comes from it (whether tangible or not). For example, if you start a blog focused on a certain service or program, the benefit of the blog would be higher awareness, more participants, and possibly higher support. The value of that would be a stronger program or more used services, etc.
2. Identify the metrics for benefits: create a list of the metrics associated with each benefit listed in step 1. For example, to use the same scenario, if your benefits include higher awareness, more participants, and possibly higher support, you could use metrics like the number of mentions on blogs or news sites online, the number of applicants or participants in the program/service, and any increased funding or volunteers.
3. Create evaluation process: decide who is monitoring which metrics, if they are tracked in the website analytics or by constituent management software, how often

metrics will be collected and shared, and what evaluation or analysis can affect the strategy in place.

## Measuring the unmeasurable

Although the tools you're using are technical and measurable, fundamentally your underlying purpose will be human, broadly unquantifiable and very difficult to prove. You will need to find ways to make your measurements real, by collecting information about what's happening in the real world.

You can do some of this via technology – such as by sending people follow-up questions and prompts by e-mail once they have used your site – and also by following up manually to build relationships with the people who are most active on your site. Quantitative data is great, but the true picture of the good you are doing might be obscured by too many stats. Try to collect stories from your community about real change happening as a result of your work. Publish them on a project blog so everyone can see them, and try to get quotes from users about the impact of the platform you've built on their lives.

Don't underestimate how many 'unmeasurable' things can actually be measured in ingenious ways, particularly if you have money to spend. The best way to approach measuring success is to work out what, in an ideal world, you would like to measure, and then research the methods available for each one. Perhaps you'll need to add technology to your platform to collect new data; perhaps you'll need to survey your users or run focus groups; maybe you'll even need to hire a separate company to research and evaluate your impact. As long as you know how valuable each piece of information is to you, you can put a maximum price on acquiring it and either go get it, or rule it out and try something else.

Finally, remember that stats are useful for demonstrating scale of impact, but it is often the **human stories** that bring it to life and show people what you've achieved. They can also be very useful tools for bringing in new users, reinforcing the sense of community and the value of the project, and attracting press and blog coverage. In the next chapter you'll hear some of the stories about what other projects have achieved, and see how they demonstrate their success and impact.

## User intelligence

It's very easy to focus all your energy measuring things other people want to know, but measuring the right things can be a vital tool to help you improve and market your offering and serve your community better. Make sure you're also collecting data to help you make decisions about what you should do next.



Finding out what your users are actually doing on your platform is critical to deciding what's working and what needs improving. Prioritise the functions you want your users to use in your tools, such as signing a petition or subscribing to updates, and watch how many of your users can do it successfully. As you make changes to key functionality, watch how these figures change. If possible, get metrics for how well key pages perform at their principle purposes: how many people drop out of your signup form? How many people who view a video leave a comment? How many people who sign your petition also forward it to a friend? Getting into the detail of how your product works, and doesn't, can give you incredibly useful data about how to improve it, and what to keep the same.

Marketing information is usually harder to gather, particularly demographics, but with a tool like [Google Analytics](#) you can usually see where your visitors are coming from – both geographically and where they came from online – and how these different visitors behave once they reach you. You can also run surveys to find out more about your users, and ask them for feedback via your platform on who they are and how they feel about the technology you've offered.

The more users you have, the more information you get to help you improve what you're doing. But don't be afraid to go and talk to people, e-mail trusted users and involve the community in your thinking. Sometimes the stats can lead you in one direction, but make sure that if you do something your community doesn't like, they can tell you quickly.

## Handling success and failure

As the old TV adage goes, “never work with animals or children”, and the same could be said of technology projects and community engagement. Setbacks and unpredictability are all part of the process, and even ultimate failure is not something to beat yourself up about. The only question that matters is **whether you can afford to fail**. Try to learn as much as you can from the experience – and always stay positive.

Of course, your project could be a resounding success! You might achieve your objectives, or stumble upon something better your community thought was more important. Here's where having your purpose clear becomes very important. You should have an idea of what success looks like not just at the micro-level of site visits and attendees at events, but at the higher, human level. It's time to remember the change you wanted to effect in the world.

All of these projects ultimately come back to what's happening offline, away from technology. Whether people use the tools you've created, or engage in the way you expected, doesn't really matter: what matters is whether the technology has made a difference to people's lives. Sometimes even the process of gathering people together a few times can be enough. Learn to spot real-world success and celebrate it.

Finally, think about the legacy you leave. As we'll see in the next chapter, some projects

have clear goals and end-points, like [Colalife](#) [7]. But for many, like [TuDiabetes](#) [7] or [Patient Opinion](#) [7], success means having an engaged community to look after. If you build something that plays an important role in people's lives, you'll need to shoulder that responsibility and keep it financially sustainable and socially stable. Success can create more work for you and your team, so be ready for that. If you've got an engaged community behind you though, then they'll be there to help you.

In the next chapter, we'll look at ten projects which have been through the process, and ask them where they think they've succeeded, and why. But whatever success looks like for your project, remember that as long as you're building up good relationships and learning more about your community, your team and the world around you, then nothing has been wasted.

## Meet the pioneers

Ten brave souls who've used these technologies and lived to tell the tale

by **NIGEL COURTNEY**

## The future has already arrived

"The future has already arrived. It's just not evenly distributed yet."

**William Gibson, science fiction author**

In the last chapter we gave you our thoughts on how new technologies might be used to deliver your social objectives. But don't take our word for it: there are a growing number of real life projects out there using these technologies successfully (and unsuccessfully) to engage communities and effect genuine change in the world. We've collected a few of the best stories we've heard to illustrate what we're talking about, show you the potential of these new tools and help you make the case for doing it yourself.

The examples we've chosen range from crusading individuals to large public sector organisations and even new businesses formed using digital technologies, working across campaigning, collaboration, community-building and digital engagement.

- Campaigners should check out [Colalife](#) [22], in which Simon Berry and his collaborators used new media to successfully lobby the Coca Cola Corporation to support African aid. At the national level, [The Nag](#) [63] have build a website that campaigns for environmental and ethical lifestyle by nagging users to make simple changes to their lives. Meanwhile, at the other end of the spectrum Genesis's [Friend or Foe](#) [64] and BRITDOC's BAFTA-award-winning film [Chosen](#) [65] have used combinations of filmmaking and digital media to engage new

communities and spread messages and increase awareness of social issues.

- If you're interested in building online communities, [TuDiabetes](#) <sup>[66]</sup> and [IDeA's Communities of Practice](#) <sup>[67]</sup> have both used online technologies for knowledge sharing and mutual support in two very different contexts, for work in local authorities and for diabetes care. On the social networking side we've also profiled [Sawvy Chavvy](#) <sup>[68]</sup>, who won a UK Catalyst Award for their smart use of social networking tools to engage the gypsy and traveller communities in supporting each other.
- The final examples might be termed 'citizen empowerment initiatives' – engaging digital communities in taking action in their own interests. [Talk2Croydon](#) <sup>[69]</sup> used online activist tools to engage the citizens of the borough in government and make people more active in the running of their community. [Freqout!](#) <sup>[70]</sup> used technology as a hook for engagement, supporting people to use new media tools to find their voices and engage in their community, whilst at the national level, social start-up [Patient Opinion](#) <sup>[27]</sup> has given NHS users a powerful new channel to give feedback to their service providers, and improved patient experiences in the process.

The examples have been selected to represent a broad range of technologies and contexts, to show the breadth of possibilities available within this work. IDeA and Croydon Council have shown that it is possible to take risks and innovate in an organisational context. Genesis, Freqout! and SawvyChavvy have bridged the 'digital divide' to demonstrate the huge inclusive power of these technologies, so long as the right technologies are used. The Nag and Patient Opinion have built successful social businesses using online tools, and are building workable business models around their projects. And Colalife has shown that real change can be effected by a loose group of individuals without an 'organisation' behind them at all.

These aren't repeatable recipes though: just because something worked in one context doesn't mean it is mechanical or predictable. Although there is often a connection between using appropriate technology and successful social projects, that connection is usually moderated by two key dimensions. Firstly the roles and skills of all the people involved in designing, implementing and using new systems, including IT people, managers, front-line staff and the service users themselves. Weaknesses here are often the major contribution to projects failing to achieve their objectives. Secondly, the organisational context, the culture, structures and business processes of those involved in the systems. Too often technology is applied in service of traditional structures and mindsets which are unsuited to this new way of engagement, and business processes are left untouched as technology simply serves to 'automate' the old way of doing things. Although the old way may still be fit for purpose, the possibilities for greater efficiencies and better ways of engaging can be lost, and the power of these tools is only half harnessed.

So these stories can only take us so far. This collection offers some inspiring tales to help illustrate the possibilities available to us all, and also a starting point for a community of best practice around using new technologies for social impact. The number of examples and lessons learnt continues to grow. We hope that you'll all be generous in sharing what you've learnt with others, and use this handbook and the

website behind it to share your own stories, so that we can begin to learn from each other and follow in each other's footsteps.

# ColaLife

How a group of individuals persuaded Coca Cola to help Africa's children

This is the story of one man's crusade to stem the terrible infant mortality rate in Africa, by persuading the entrepreneurial local distributors of Coca Cola to pop a phial of vital medicine into each crate. As an experienced social entrepreneur, Simon Berry used every communications technology he could to publicise his idea, including [Twitter](#) [7], [blogging](#), [Facebook](#) [7], [Flickr](#) [7], [YouTube](#) [7], and a dedicated website serving as a focal point for media coverage and search engine traffic.

Within weeks, and at minimal cost, more than 2,000 people had signed up to support the campaign. All the content has been generated and donated by the participants. This persuaded broadcasters to take up the baton and attracted the interest of organisations in Africa – and Coca Cola itself. In just six months Simon's idea became a social movement which caught the attention of one of the world's biggest brands – an achievement that was confirmed in April 2009, when Coca Cola committed to trialling ColaLife in Tanzania.

[ColaLife](#) [71] is the brainchild of Simon Berry. It is a personal and voluntary campaign for him and his associates. The man and the mission are indissolubly linked.

When Simon graduated in 1977, he joined the British Government's Aid Programme, living and working in South America, the Caribbean and Africa. In 1988, this work took him to North East Zambia to help to local councils plan and implement a local development programme. "North East Zambia is very, very remote. I was horrified to learn that one in five children dies before the age of five – that's four deaths per minute in Africa alone – and they die mostly from simple causes like dehydration from diarrhoea... but I noticed that, despite the remoteness, virtually everywhere we stopped you could get a Coca-Cola. This set me thinking: why couldn't Coca-Cola use their distribution channels to distribute oral rehydration salts to the people that needed them so desperately?" says Simon.

However, in 1988, there was no telephone and no internet; the post took three weeks. Simon couldn't get any traction for his idea.

Twenty years on, the situation remained bleak; child mortality statistics hadn't changed and in that time 40 million children would have died in Africa. In May 2008, Prime Minister Gordon Brown hosted the 'Business Call to Action' conference and asked companies what they were going to do in the fight against poverty in Africa – an initiative to be adopted by the UN. [Twitter](#) alerted him that the conference organiser was broadcasting a 'live blog' – an online, text-based account of proceedings. The Chief Officer of Coca-Cola stated his intention to grow their 'Manual Distribution Centres' in

Africa and said that the increased employment that resulted would help reduce poverty. “There was no social element; the proposal was purely economic. I immediately contributed my ‘ColaLife’ rehydration salts idea via the live blog ... but got no response.”

Using his personal [blog](#), Simon posted a description of the ColaLife idea. He included a photo with a [Creative Commons](#) license from the photo sharing application [Flickr](#) [7]. It pictured Coca-Cola being delivered by horse and cart in Dakar. He phoned Coca-Cola and pointed them to the article, but “I was fobbed off so I decided to set up a [Facebook](#) [7] group and invited friends.”



The Saturday edition of BBC Radio 4’s PM programme is interactive and is formulated each week by listeners via the iPM blog. Simon proposed a debate on the ColaLife idea but it was not picked up. He tried again a second week without success. “In the third week I asked everyone I knew who wasn’t named Berry to pile in and say it was a good idea.” iPM became very keen and Simon was interviewed by the presenter, Eddie Mair, straight away. This two-minute interview was then used to pull in other contributors to the feature. The iPM team put in several days work, including extracting a statement of interest from Coca-Cola and persuading Eve Graham, the voice on Coca-Cola’s most successful advertising campaign, to sing alternative lyrics the New Seekers hit ‘I’d Like To Teach The World To Sing’.

This resulted in an invitation to meet Salvatore Gabola, Coca-Cola’s global head of stakeholder relations, based in Brussels. By this time the [Facebook](#) [7] group had grown to 300 members and Simon promised to pick up the phone to Mr Gabola when the number reached 1,000. To his amazement this happened within ten days. By the time they met in Brussels more than 2,000 members had signed up. Mr Gabola agreed that the ColaLife idea should be incorporated into the research into the distribution network that Coca-Cola was planning as part of their Business Call to Action commitment. He also agreed to link up with Coca-Cola’s field researcher, Adrian Ristow, in Ethiopia and Tanzania, and Simon’s wife Jane converted Adrian’s regular email reports into articles and pictures on Simon’s blog.

People started to cluster around the ColaLife idea. The iPM’s Jennifer Tracey monitored and reported progress on the iPM blog. Tielmann Nieuwoudt, a logistics consultant in emerging markets helped by providing photographs and advice. Kate Andrews, a writer on social design and innovation, learned through Facebook that she had been at university with Simon’s son and set up a ColaLife Flickr group which quickly attracted 300 members. As a result of Kate’s Flickr site, the design community cottoned on and, entirely free of charge, began working on designs and materials for the medical containers later known as ‘ColaLife pods’ – a prism-shaped pod that nestles between the necks of the bottles.

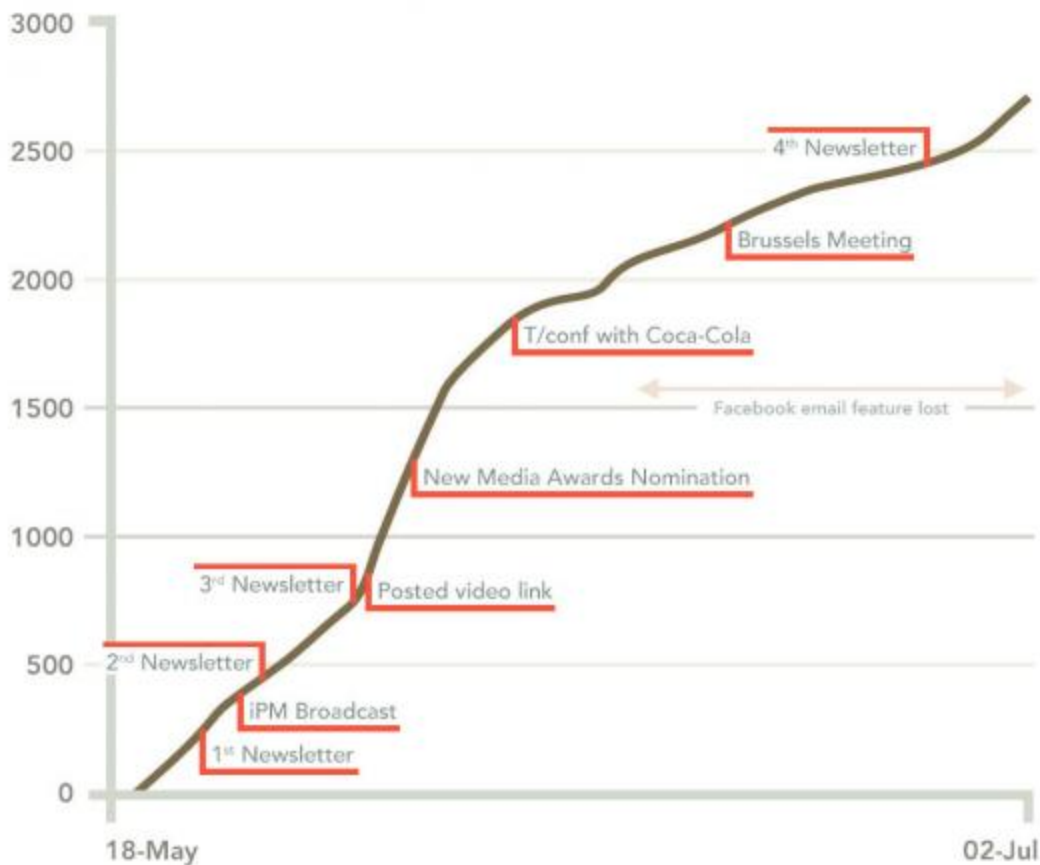


As a result of this publicity Simon was invited in November 2008 to Dar Es Salaam in Tanzania to meet representatives of Coca-Cola, charities including Save the Children Fund, and local non-government organisations (NGOs) concerned with microfinance and the distribution of social products. Simon took his folding bike and a [GPS](#) device so he could mark locations and revisit them two days later to record the scenes on video for the blog.



In his travels Simon learned that the Manual Distribution Centres are not owned by Coca-Cola: distribution and bottling is independently-run by local entrepreneurs. Their staff were dismayed at the prospect of replacing one bottle in a crate with a ColaLife pod, but they were receptive to the alternative design which sat in the gaps between the bottles. “Coca-Cola’s fabulous distribution system is entirely driven by profit. ColaLife mustn’t damage it ... but it could even enhance it. For example, we could promote the larger pods by paying the carrier double the profit margin they would have made on the displaced bottle.”

## Group Growth - 44 days



Simon concedes that the ColaLife initiative didn't get 'viral growth' – the project developed in a rather traditional way. Peaks in the graph coincide with radio broadcasts and newspaper articles. But much more progress has been made than expected. The ColaLife Facebook group now has over 7500 members and the number is increasing by 10-25 per day. People have started ColaLife sub-groups on Flickr and a completely independent group in The Netherlands has taken up the challenge. A Google search for 'colalife' brings up more than 10 solid pages of links related to the campaign.

The campaign is evolving as more people contribute their skills. "We are learning as we go and incorporating the ideas of others. What is actually distributed should be locally determined not dictated. It may be that oral rehydration salts are appropriate but it could be malaria tablets or tablets to sterilise water or condoms or something else. So we've moved to the idea of a 'ColaLife Pod' that could carry anything."

These new technologies enable campaigners to reach influential people, but they also allow anyone to contribute freely in whatever way they can. In ColaLife's case these voluntary influencers include the BBC Radio 4 iPM programme's Eddie Mair, Eve Graham's singing, Tielmann Nieuwoudt for his library of relevant photographs, David

Wilcox for his video reports, Jane Berry for her wordsmith skills, Kate Andrews for her press articles in the USA, Edward Charvet of Trovus Revelations, Simon Cohen of the ethical PR company Global Tolerance, Dave Briggs for the ColaLife website and Jess Ponsford for helping to bring the ColaLife Pod concept to life.

By using a wide range of communications technologies, the ColaLife campaign achieved its initial objectives in a matter of months. The next step is to engage an international NGO to work with Coca-Cola to trial the ColaLife idea. Simon concludes: "Anyone could use this technique, it's available to all. The technology just allows people to sign up. It enabled us to get in front of Coca-Cola within three weeks and to change the agenda. But ColaLife will mean nothing until we have properly monitored trials underway in Africa. That's the next milestone."

## See also

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- [www.colalife.org](http://www.colalife.org) <sup>[72]</sup>
- [www.ruralnetuk.org](http://www.ruralnetuk.org) <sup>[73]</sup>
- [www.defra.gov.uk/corporate/how-do-we-work/third-sector/strategy](http://www.defra.gov.uk/corporate/how-do-we-work/third-sector/strategy) <sup>[74]</sup>
- [www.dfid.gov.uk/mdg/call-to-action-business.asp](http://www.dfid.gov.uk/mdg/call-to-action-business.asp) <sup>[75]</sup>
- [www.coca-cola.com](http://www.coca-cola.com) <sup>[76]</sup>
- [www.evegraham.com](http://www.evegraham.com) <sup>[77]</sup>
- [www.bbc.co.uk/blogs/ipm](http://www.bbc.co.uk/blogs/ipm) <sup>[78]</sup>
- [www.2gether08.com/2008/07/06/bbc-adds-more-support-for-simons-coca-cola-campaign](http://www.2gether08.com/2008/07/06/bbc-adds-more-support-for-simons-coca-cola-campaign) <sup>[79]</sup>

## How to use tagging and RSS aggregation to gather supporters

Simon Berry, ColaLife

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Your potential supporters could be anywhere and so you need to get their attention by being in as many places as possible yourself. One of the secrets of success is the use of tagging and aggregation. These two elements of Web 2.0 have transformed the convening power of the internet but require you to take a completely different approach.

1. Don't start with your website – you're not likely to have a multi-million pound marketing budget and so few people will find it.
2. Instead, get your content into as many channels as possible: alerts on Twitter; photos on Flickr; video on YouTube and Vimeo; bookmarks on Delicious and so on.
3. Now use your website as an (automatic) aggregator of all this amazing stuff.
4. Establish a tag for what you are doing so others can help you too. Set up 'vanity' RSS feeds to keep a track of what others are saying about your campaign – visit their sites, thank them and comment on what they are saying.

If you know how to network offline, you'll have no problem online with RSS and tagging.



# The Nag

Changing the world one lazy-assed mouse click at a time

The Nag is a campaign website which promotes positive actions and enables users to join pressure groups to tackle key social and environmental issues such as ethical fashion, recycling and the need for green energy. The Nag site supports online discussion [2], mapping [2], voting [2], wikis [2] and automated monthly e-mail [2] reminders.

The project started in 2006 with grants and loans totaling £25,000 and took a year to build. With a second year of funding of £30,000, and some referral income from renewable energy firms, it has now built up over 8,000 members and a team of five. The site nags people to take individual and collective action on a monthly theme. Over 1,000 Nag users have copied and sent an appeal to the Minister of Transport to 'make train fares cheaper than planes', and such activities have earned The Nag an international award as the best ethical website.

For most of us the big issues we face – climate change, poverty, global inequity – seem too far out of reach to connect with as individuals. The idea that any one of us can do anything about these challenges seems improbable. But perhaps if enough of us were to tackle one issue at a time in our day to day lives, we might make a difference.

At the turn of the millennium Cyndi Rhoades recognised a growing need for new and creative approaches to engaging audiences in social and environmental issues. In 2002 she approached the New Economics Foundation with the idea of 'Anti-Apathy' – a series of 'issues meets entertainment' evening events aimed at connecting new audiences with global issues in a refreshing way.

As the events grew in popularity, Anti-Apathy became an independent charity based at The Hub in London, Islington. Since then, their successes have included Worn Again with Galahad Clark in 2004 – a design-led social business which makes and markets fashion products from recycled materials like bicycle tyres and prison blankets – and the RE:Fashion Awards, the world's first awards celebrating designers, NGOs, manufacturers and retailers who have taken great strides in tackling poverty, healing the environment and changing consumer attitudes across the fashion industry.

"The Nag is Anti-Apathy's 'world-saving made simple' online creation. It helps people do one thing a month to make the world a better place, one lazy mouse click at a time. For example, by switching to green energy or by nagging your favourite clothes shop to make your clothes guilt-free," says Cyndi.

She was able to secure a grant of £15,000 from J.A.Clark Charitable Trust of Glastonbury, which supports projects orientated towards social change in areas of health, education, peace, preservation of the earth and the arts, and an additional loan

of £10,000 from Fair Finance to start work on the Nag.

It took a year to develop and build the website. The Nag team identified key lifestyle themes such as, food, fashion and finance, and explored what nags would be effective in bringing about change. Users were to be sent a new nag every month which would take them step by step through a simple action, with the aim of galvanising individuals to act collectively around the big problems we all face – by making it so easy that it becomes irresistible.

At this time the UK was suffering a severe drought, so the first issue tested was about conserving water. A micro-site called 'the Hippo Effect' helped people to order a free hippo, a water saving device placed in a toilet cistern to help save on average 10 litres of water every day. Within three months over 5,000 had been ordered through The Nag – a clear proof of concept.

Since then, other monthly nags have included the 'Rag Nag', which helps people send a letter to their favourite high street clothing shop asking them to make 'guilt-free' clothes, and the 'Make Trains Cheaper than Planes' nag where participants are invited to download a draft letter and send it to the Minister of Transport. Within two weeks over a thousand people had done so, and the number keeps on growing. Users can see how many people have taken each action and key facts like the amount of CO2 saved, and for each key theme the site also features a map of the UK on which a participant can mark their location and see the impact that lots of little actions can make when we all do them together.

Another theme, green energy, was identified as a possible revenue stream for the project. Affiliate relationships were set up with renewable energy companies which offer between £12 and £15 for each *person who switched to green energy*. "This wasn't as effective as we had hoped. People can be very sticky. We only get a few switches a month, not the 100 and more that we were looking for to help finance the project.

Just when things began to look rather grim for paying back the £10,000 loan, Briony met a most unlikely saviour at a music festival – a Buddhist poker player. This man liked the idea of The Nag so much that he offered to donate 10% of his winnings over the next three months. "During one match, he was seven hundred thousand up which made our promised 10% look like a sizeable payoff ... only to be lost in three unlucky hands!" Despite the decreased pot of gold, there was just enough to pay off the remainder of the loan and enable the site to be launched in May 2007.

The required budget for the next year was £50,000. Cyndi and Briony obtained another grant of £15,000 from Tedworth Trust, one of the Sainsbury family's charitable trusts, which supports projects for sustainable living. They also secured a grant of £10,000 from Polden Puckham, a Quaker organisation which support projects that change values and attitudes, promote equity and social justice, and develop radical alternatives to current economic and social structures. In addition The Nag's parent, Anti-Apathy, had support from UnLtd, a charity which supports social entrepreneurs. "UnLtd offered £5,000 as part of their Level 1 Award scheme, to see if the idea of The Nag had legs."

And it did. In 2008 The Nag won the 'Yahoo! Finds of the Year' award for best ethical web site and came 2nd in the category 'Best Online Campaign' in the Green Web Awards for creative approaches to social and environmental issues.



This success has propelled The Nag into a second phase. Cyndi has recently engaged a new project director to assemble a team of freelance designers, writers and web technicians to work flexibly according to need and budget.

"The first phase of The Nag was about inviting people to take action on one thing a month and imagine the collective impact as more and more people do that same action. Eight thousand people have registered ... but that's not enough and we've seen that the sign-up rate tends to drop off after one or two actions."

So the goal for 2009 is to increase the number of active users. Cyndi observes that The Nag must evolve in order to keep interest and grow. "We need to take things to a new level. We now have a much better understanding around what's worked and what hasn't. The second phase is about harnessing the wisdom of crowds ... about enabling people to work collectively to find a solution. Then we can transfer the power of The Nag from the makers to the users and see how people work together to make things happen."

Cyndi knows that the problems we face will require more than just switching to green energy. "We hope that the growing and diverse community of users on our database will

help to formulate some of these solutions as we launch the next phase of The Nag. Understanding what makes people act and engage in these issues on a grand scale is the Holy Grail. We'll keep cracking away until we've found it."

## See also

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- [www.TheNag.net](http://www.TheNag.net) <sup>[80]</sup>
- [www.antiapathy.org](http://www.antiapathy.org) <sup>[81]</sup>
- [www.wornagain.co.uk](http://www.wornagain.co.uk) <sup>[82]</sup>
- [www.refashionawards.org](http://www.refashionawards.org) <sup>[83]</sup>
- [www.neweconomics.org/gen/](http://www.neweconomics.org/gen/) <sup>[84]</sup>
- [www.the-hub.net](http://www.the-hub.net) <sup>[85]</sup>
- [www.polden-puckham.org.uk/](http://www.polden-puckham.org.uk/) <sup>[86]</sup>
- [www.unltd.org.uk](http://www.unltd.org.uk) <sup>[87]</sup>
- [www.sfct.org.uk/tedworth.html](http://www.sfct.org.uk/tedworth.html) <sup>[88]</sup>
- <http://uk.promotions.yahoo.com/finds2007/ethical/> <sup>[89]</sup>
- [www.nigelsecostore.com/green-web-awards/](http://www.nigelsecostore.com/green-web-awards/) <sup>[90]</sup>

## How to build the brand for a creative enterprise

by Cyndi Rhoades, The Nag

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1. Identify your audience and market and define the core task for the brand, i.e. 'create an online platform that makes it easy for people to make their lifestyles more sustainable, one mouse click at a time'.
2. Know your audience. Define your customer segmentation.
3. Understand your company beliefs and aims and turn them into brand values.
4. Create a single brand vision. Give it a twist.
5. Define the personality of the brand.
6. Define the central essence of the brand.
7. List/understand the brand's uses across all media – is it online, offline, both?

## Genesis: Friend or Foe

Using digital filmmaking to educate and protect vulnerable people

Vulnerable people can be victims of subtle forms of financial abuse involving false befriending and fraud. Two years ago a Housing Trust with 45,000 residents in London and the South East catalysed a citizen empowerment initiative to tackle the problem on their estates. An activist consulted victims who wanted to help others avoid the traps they had fallen into. With funding of £20,000 she recruited a filmmaker to make a video documentary, 'Friend or Foe', to bring this subtle abuse to the attention of social workers and warn the general public.

Several dozen victims contributed as actors, scriptwriters and film crew. The experience has transformed their lives. After one year's filming and editing the 26-minute DVD is being distributed to 300 Primary Care Trusts, mental health organisations and publicists. The video is also published online for download from popular social media. an international award as the best ethical website.

In 2006 Genesis Community was asked to identify gaps in the Group's service provision and propose ways to fill them. Their tenant population includes vulnerable older people, and residents with learning difficulties, disabilities or mental health problems. When they consulted residents, some of whom had difficulties paying their rent, they discovered a number of tenants were being subjected to a subtle form of abuse known as 'false befriending'. The perpetrators catch old and vulnerable people off guard with a plausible story and then coerce them into parting with money. It can be via email, in person, by phone or by letter, but the effects can be devastating. The scammers do it for a living. Some operate locally, insinuating themselves into their victims' lives by posing as friends; others operate by mail from other countries. Both approaches defy intervention: Trading Standards officials and Citizen's Advice Bureau staff say it is too hard to bring the abusers to book. Besides, when the victims do realise that they've 'been had', they often feel stigmatised and too embarrassed to report the matter to anyone.

Genesis Community's Sue-Jane O'Keefe was tasked to look at ways to address and expose this insidious and unpleasant abuse and, ideally, to stamp it out. In previous work at Age Concern Sue-Jane had become aware of the scamming problem. "But when we started asking questions it was horrifying to find how extensive this abuse was. One resident was using almost all his state benefits to buy exorbitantly priced hair products from someone in The Netherlands in order to qualify for a 'free' holiday & "cheque" that he had been told he had won. Another was being conned into lending money to a 'false befriender' living on the same housing estate. Another was being charged 1500% interest on a loan."

Sue-Jane discovered that some printed materials already existed for tackling the problem, "but the abused people we wanted to help can have reading difficulties or prefer other methods of communication. I saw that we had to do something different ... something visual and experiential."

A DVD seemed to fit the bill. The first aim was to build and train a team of people to make a difference and secondly to raise the profile of this subtle abuse and help protect people.

Sue-Jane saw that the approach had to involve people who had suffered or knew of others who had suffered this form of abuse and wanted to protect others by forewarning and empowering them to recognise and deal with it. She envisaged a programme segmented into bite-sized chunks for different viewers: healthcare professionals, carers, and individuals themselves'.

Sue-Jane's project was awarded a £20,000 as part of NESTA's Innovations in Mental Health project. Genesis Community seconded her time to the project at no cost and she

engaged a local filmmaker, Jason Gleeson, who had experience of working with vulnerable people including people with substance misuse problems.

The project's original name was 'Exposing subtle abuse', but when they tested this with the target audiences some people were put off by this and it was dropped in favour of 'Friend or Foe DVD'. Work started in November 2007 by talking with carers and relatives of Genesis's vulnerable customers, as well as consulting local mental health organisations and groups, mental health professionals, Primary Care Trusts and Local Authorities about content and distribution.

The volunteers were people who had decided to stand up & talk about it "... because if not, it's not going to stop". They were invited to describe real-life situations in which subtle abuse had occurred. In some cases this was the first time they had admitted to anyone that they had been or were being conned. Their scenarios were written up and developed into story lines.

Some of the tenants were then persuaded to act parts; others were inducted as film crew. "Most have enduring mental health problems. We engaged with them by offering a real sense of purpose, and not money. And we fitted them out with exclusive film crew T-shirts and caps to engender real ownership for the project – the important factor was that our tenants were involved in aspects of the film making, from the storyline, to set design, acting, and editing."

Following a series of consultative workshops a set was built and the participants were bussed in to film, or were filmed in their local areas. Scripting and shooting took eight months; editing and production took a further two months. The film-maker Jason published [blogs](#) and video content on [MySpace](#) <sup>[7]</sup> throughout the duration of the project, so tenants could provide feedback. On completion of shooting he edited the film stock and arranged for the DVDs to be made and boxed.

The result is *Giantlands* a 26-minute video set in 2060 when a flood had submerged East London. The stories it tells help to raise vulnerable people's feelings of self-worth, with the aim of making them 'job ready' and employable.

Three hundred copies of the DVD have been disseminated to Housing Association tenants, Primary Care Trusts, organisations which support vulnerable people and those with mental health needs, housing providers, and also to media and PR people at relevant events. The DVD has now been entered in the Green Unplugged Film Festival and a videostreamed version is now available via a [webhost](#) in India and via [MySpace](#). <sup>[7]</sup>



The Friend or Foe project has raised the confidence of tenants within a safe environment and showed a positive side to mental health. The lives of many of the participants have been transformed. One participant was able to resume a lost interest in painting; another has enrolled at College to study filmmaking. One habitually wore a

hat with a veil because of her perceived ugliness – but gained the confidence to leave it off for the film, and be a main actor in the DVD. Sue-Jane is particularly proud that one participant has now written a book and produced a DVD about homelessness and the road to recovery.

Sue-Jane sums up: “Our Friend or Foe DVD ‘Giantlands’ was a one-off project. Its purpose has been to get the maximum media coverage for the minimum outlay and to raise awareness about subtle abuse, and the harm this does cause. Its legacy is to get people to take positive action and to empower people so that they get advice and know what scams to watch out for ... and not to be embarrassed if they have been scammed – it can happen to anyone.”

## See also

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- [www.ghg.org.uk](http://www.ghg.org.uk) <sup>[91]</sup>
- [www.ghg.org.uk/Genesis+Community](http://www.ghg.org.uk/Genesis+Community) <sup>[92]</sup>
- [www.ageconcern.org.uk](http://www.ageconcern.org.uk) <sup>[93]</sup>
- [www.nesta.org.uk/exposing-subtle-abuse-genesis-community](http://www.nesta.org.uk/exposing-subtle-abuse-genesis-community) <sup>[94]</sup>
- [www.myspace.com/GCfilm](http://www.myspace.com/GCfilm) <sup>[95]</sup>
- [www.cultureunplugged.com/play/1030/Giantlands/VmtaV1JrOVdRbEpRVkRBOSf](http://www.cultureunplugged.com/play/1030/Giantlands/VmtaV1JrOVdRbEpRVkRBOSf) <sup>[96]</sup>

## How to engage vulnerable people in a video production project

By Sue-Jane O’Keefe; Genesis Community

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- Ensure staff/carers have buy in
- Develop trust by running small workshops in a safe environment
- Refreshments are essential!
- Ensure the project is inclusive so everyone can have an equally valued role in the process whether it's writing, acting, editing, painting the set or making the tea.
- Encourage a sense of ownership & worth (ie Film Crew T-Shirts & Caps plus accreditation on the DVD cover etc) It's not about doing to, or doing for, it's about doing with...
- You must be highly flexible in your approach, and factor in over-run time – a format that works for one group will not necessarily work for another group
- Go at a pace the group are comfortable with.
- Consult the group on all decisions.
- There must be a tangible output (ie a DVD/film launch/performance/film festivals).
- Maximise coverage & accessibility by downstreaming <sup>[2]</sup> the film.

## The Channel 4 BRITDOC Foundation and

# Chosen

Using the internet to turn a film into a campaign

BRITDOC is an ongoing campaign to produce and promote professional documentary films for the general public on key social issues. One such is Brian Woods' film *Chosen*, which raises the issue of abuse in Britain's private schools.

Following the broadcast on More4 there were 28,000 hits <sup>[2]</sup> to the guidelines for parents on the *Chosen* website. Ed Balls, Secretary of State for Children, Schools and Families, subsequently called a review into safeguards at independent schools. In April 2009, '*Chosen*' won the BAFTA award for Best Single Documentary.

British TV broadcasting has a history of producing campaigning films that have made a real impact and forced change. An early and highly influential example was '*Cathy Come Home*' which, in 1966, attacked the failure of the housing and social welfare systems to support families in desperate need. A wealth of documentary filmmaking talent remains in the UK but traditional funding streams for these films are drying up. Social action documentaries now depend increasingly on the third sector, corporate brands and private individuals (such as former US vice-president Al Gore) to get their messages out to audiences.

To tap into and preserve this rich tradition, Channel 4 provided core funding of £500,000 per year to establish the BRITDOC Foundation. Their Director of Television and Content, Kevin Lygo, sits on the Foundation's board and helps vet the agenda. BRITDOC measures its success by the number of industry awards (50) and festival screenings (150) it has secured, and the proportion of its output that is broadcast on national TV (60%).

The four social entrepreneurs that make up the team seek to mobilise forces for change by identifying key partners and setting realistic targets for the social action documentaries they espouse. Two of the team are former commissioning editors who cut their teeth at Channel 4, two are experienced filmmakers. They respond to specific failures in the marketplace and can afford to be less risk averse than the mainstream broadcasters or public funders like the UK Film Council.

"We only take films that broadcasters have declined. We invest in passion projects from new as well as established filmmakers," says founding director Beadie Finzi.

The team and their web developers publicise the campaign with a range of communications technologies – broadcast TV and DVD as well as an online portal, focus groups, mass mailings and film festivals – to engage with the viewing public. The online portal now has over 14,000 members signed up (around 1000 very active), as well as a growing number of funded grantees. Applications to the fund are made through the website which also provides information on funding and distribution opportunities. Once a filmmaker's project has been accepted, the team then sets about considering the best strategy and partners. In addition, the Foundation runs



professional development training courses for its grantees throughout the year.

The film *Chosen* illustrates the Foundation's policies in action. *Chosen* is a feature-length documentary about sexual abuse at Caldicott, a British public school. This taboo subject was proposed by Brian Woods, a top UK director noted for his award winning revelatory documentaries including *China's Stolen Children* and *The Dying Rooms*.

"Even though it was a Brian Woods film, no-one would commission it. But we were wholly persuaded by Brian and the three abuse survivors, now middle aged, who were determined to stand up and make a difference. So when we asked ourselves the question 'Why make it?', 'What are we going to do with it?' the answer seemed clear. This film would not only bring to light shocking malpractice but it could set about giving parents greater awareness and confidence when selecting a school. The film's contributors had the further aim of wanting to bring about a change in the law that currently relieves schools of the legal requirement to report allegations of abuse."

So the Foundation's aims extended beyond the making of the film and became very strategic. Before the final cut of the film was agreed it was screened to fifty of the leading organisations involved in child protection to get their feedback and support. This mass screening was followed up with focus groups and this has led to the creation of a set of materials and tools.

First, 10,000 postcards were distributed amongst schools, parents and child protection professionals by the London branch of the national campaign Stop It Now! The cards included 4 questions which parents can ask about the child protection policies at their children's schools. The answers that they can expect to get back from the schools are included on the film's purpose-built website.

Second, specific journalists were sought out and pressed for coverage around the time the film was transmitted. This resulted in numerous editorials further raising the issues and directing people to the film's website.

Third, a training edition of the film is being made available to relevant child protection agencies. The training edition includes over 2 hours of chaptered excerpts, covering the issues raised in the film in greater detail, and it is designed as a training tool for child protection professionals working with children, parents and educators.

The film was broadcast on More4 in September 2008 and then again at prime time on 15th December on Channel 4. Since those broadcasts, a parliamentary review of safeguarding legislation has been announced, to which men featured in the film are contributing. Furthermore, the Foundation directors have secured a meeting with Ed Balls, Secretary of State for Children, Schools and Families, to discuss the issues raised in the film.

The Foundation's aim is to match-make filmmakers with potential funders and distributors and to optimise the cultural and creative impact of documentary film. "Our motives are transparent. We are simply passionate about supporting the very best documentary films. We give a grant to the director to enable them to make work that

would not otherwise be funded and we take no backend. All we require is our logo in the credits.” And the benefit to Channel 4 is the right of first refusal on some of the most ambitious and creative work being made in British film.

“In a changing media landscape, however, our long term challenge is to cultivate a swathe of new partners for documentary. That will often mean partners who are looking for something beyond profit. The End of the Line, our new documentary about the depletion of the world’s fish stocks, has raised a million pounds of soft money from NGOs and Foundations. The backers’ ambitions are not financial – their aim is to bring about a change in world policy on overfishing.”

Beadie reflects: “The problem is there are too many opportunities and so much demand...bespoke training, personal development, funding films. The challenge for us is to stay focused on where we can have most social impact.”

The BRITDOC Foundation aims to become the UK centre of excellence in creating impact around film. CEO Jess Search is developing a methodology for valuing, in financial terms, the social impact of documentary. As part of this, business partnerships are being developed with US outreach experts Working Films. This partnership is about to launch goodfilm.org, an online campaigning tool that links filmmakers and change makers through the issues that drive them both.

The Foundation continues to set itself internal targets, such as delivering 10 documentaries per year of which four will be feature-length. It would also like to raise the number of films taken up by Channel 4 on completion. Jess’s toolset for measuring the social impact of communications technologies for social change and the effectiveness of the outreach experts will play a key role in sustaining the flow of funding for the enterprise.

“We want to change the mindset, to create a new model for film makers, to raise their expectations about what they might hope to achieve with their documentary films. However, no two campaigns are ever the same. In each case we set realistic goals and then find the partners needed to achieve those goals.”

## See also

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- [www.britdoc.org](http://www.britdoc.org) <sup>[97]</sup>
- [www.chosen.org](http://www.chosen.org) <sup>[98]</sup>
- [www.britdoc.org/real\\_good/goodfilm](http://www.britdoc.org/real_good/goodfilm) <sup>[99]</sup>
- [www.workingfilms.org](http://www.workingfilms.org) <sup>[100]</sup>
- [www.sheffdocfest.com](http://www.sheffdocfest.com) <sup>[101]</sup>

## How to turn a film into a campaign

Beadie Finzi; Channel 4 BRITDOC Foundation

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1. As a filmmaker, ask yourself if you have the time and the commitment to initiate a campaign around your film.
2. Identify campaign partners early on, experts in the field who have resources and who are key to the sustainability of a campaign.
3. Set campaign goals based on an understanding of the target audiences for your film.
4. Devise a campaign strategy appropriate to those audiences incorporating both a distribution plan (TV, theatric, DVD release), press & PR, special events, plus online tools such as social networks, viral campaigns, blogs.
5. Raise finance specifically for the impact work – successful outreach campaigns require ongoing coordination and commitment.
6. Be prepared to be flexible about your film in order to optimise its usefulness in the campaign. e.g.: creating shorter versions, training editions.
7. Devise a strategy to track the impact of the campaign.

## TuDiabetes

Using free tools to build a supportive community around a chronic illness

This social network was started two years ago in California by an electrical engineer who had been diagnosed with diabetes but found it hard to get information and practical advice on his condition. Working with the free [Ning](#) [7] platform he built a website in less than a month to give diabetes sufferers a forum for exchanging their knowledge and their feelings.

Within days he had 300 members. With user growth of 10% per month, driven mostly by traffic from bloggers and social media, membership now exceeds 9,000 in over 140 countries. This has spawned more than 250 local groups who meet face-to-face. Members recently collected \$7,000 to help defray the set-up costs of founder Manny Hernandez and supplement the income from [Google Ads](#) [7]. TuDiabetes has become a full time job for Manny and his wife. They have added a sister site in Spanish and thriving fan clubs on [YouTube](#) [7], [Facebook](#) [7] and [Twitter](#) [7]. In 2009 their plan is to secure sponsorship from makers of insulin pumps and to launch a volunteer programme.

If you are diagnosed with a chronic disease, your doctor can give you the facts, but where can you go for emotional and practical support – especially if the condition is seen by some as unmentionable? This is the dilemma facing many of those who develop diabetes. About 7% of the US population has diabetes, although the figure is nearer to 11% among Hispanics and African-Americans.

Diabetes is a metabolic disorder resulting in abnormally high blood sugar levels due to defects in either 'insulin secretion' (Type 1) or 'insulin action' (Type 2). Although there is no cure, all forms of diabetes have been treatable since insulin became medically available in 1921 – Type 1 by regular injections of insulin, and Type 2 by a combination of dietary treatment, exercise, medications and insulin supplementation.

Manny Hernandez, a Hispanic electrical engineer and web product manager living in the San Francisco Bay Area, California, had to find all this out in 2002 when, in his early thirties, he was shocked to be diagnosed with Type 2 diabetes.

Manny turned to books and the web to learn more, but it was not until mid-2006 that Manny heard about an 'insulin pumpers club', where users of insulin pumps met on a monthly basis to support each other. Manny had been on an insulin pump since July 2005, so he went along to a meeting where he met a number of people with diabetes.

When he told them how his treatment had become less effective since he started to run half-marathons it emerged that Manny actually has Type 1 diabetes and had been misdiagnosed. His fellow patients seemed to know more about his diabetes than the doctors.

In late 2006 Manny was deeply impressed by Thomas Friedman's book on globalisation *The World is Flat* "It is a phenomenal read. My diagnosis, this book and my work as a person with background working on the web came together to point me to the idea of social networking [2] which had started with sites like MySpace [7] and Facebook [7]."

The idea of creating a social network for a higher purpose was born. Manny looked for an inexpensive and easy-to-use platform for a discussion area where he and other diabetic Hispanics might share their experiences and practical tips. In March 2007 he discovered Ning [7], an online platform [2] for creating, customising, and sharing a social network. With this, in the same month, he built and launched TuDiabetes, the world's first social network about diabetes. In Spanish this signifies 'your diabetes'; English-speaking visitors took it to mean 'diabetes too'.

The response to the TuDiabetes launch was electrifying. When three noted diabetes bloggers [2] joined, membership went up to 300 within a few days and they soon acquired their first 1000 users. Since then news of TuDiabetes has continued to spread by word of mouth. TuDiabetes membership has climbed to 7,000 and continues to grow by 10% every month. The main sources of traffic are Google [2], Twitter [7] and various RSS feeds [2]. Manny is no stranger to the idea of viral marketing [2]. He is ranked in the top 100 reviewers on Amazon.com. "I do it for fun. People soon decide if you are an independent voice that can be trusted."



In August 2007, Manny launched a sister community, EsTuDiabetes ('it is your diabetes') which has become a top destination for people searching online for support and information about diabetes in Spanish. Additionally, a [YouTube](#) [7] channel, a thriving fan club on [Facebook](#) [7], a [Twitter](#) [7] profile page and a [video blog](#) have followed.

In 2008 he started the Diabetes Hands Foundation, still the only non-profit focused on connecting people touched by diabetes (both those with diabetes and their loved ones) and raising diabetes awareness. The burgeoning membership means that Manny and his wife Andreina (Creative Director of the foundation) now work full-time for the initiative and draw a salary. They have set up a board of directors and an advisory board and are currently awaiting 501c3 status, which will make all donations to the foundation tax exempt.

The foundation raises diabetes awareness through a wide range of online outlets. The first diabetes awareness program, 'Word in Your Hand', was born within TuDiabetes. This program invites people with diabetes to write a word on their hand that expresses how they feel about diabetes and submit a photo of it. There are weekly prizes for the best submissions. Some entries have included the words: endless, brave, ouch, shame, frustrated, and accepted.



Manny has used [Google Ads](#) [7] to generate income from the TuDiabetes site, but the income is not sufficient to cover all operational costs. Members have collected and donated \$7,000 to defray costs and Manny is now moving towards sponsorship deals with firms making appliances like insulin pumps. The Word in Your Hand program was

licensed by OneTouch, one of the largest makers of blood glucose meters, and it is now part of a cause marketing campaign they are running. For each submission made on [diabeteshandprint.com](http://diabeteshandprint.com), OneTouch is making a donation of \$5 to diabetes charities.

Manny has always been personally engaging with users on the TuDiabetes site, but increasingly he has had to induct volunteers to welcome new members and help with the administration of the community.

“The initiative is simultaneously becoming international and very local. We have more than 140 countries represented in the community. At the same time, there are more than 250 groups, many of which are regional and local in nature, meeting up and connecting members that didn’t know anybody else with diabetes until recently. One of the members is helping quantify the impact we are having, but we frequently hear from new members how thankful they are for the opportunity to learn from others and because they finally do not feel alone in having diabetes.”

The [Ning](#) [7] platform is commercially hosted and can support networks of well over 300,000 members, so scalability isn’t a problem. Whilst it isn’t appropriate for people with more bespoke needs or who want to host the network themselves, for Manny it has been the ideal tool. He expects to stay with Ning for the foreseeable future: so much so that he has written the book ‘Ning For Dummies’, published in early 2009.

The plan for 2009 includes the formal launch of a volunteer programme beyond welcoming new joiners, the appointment of regional ambassadors to help develop the roots of the organisation regionally, applying for grants and partnering with teams in academia and other organisations with which we share a common vision.

Manny concludes “there are about two hundred and fifty million diabetics worldwide and seven million new cases every year. I am sure we will be busy helping people connect while raising awareness about diabetes for a very long time to come.”

## See also

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- [www.diabeteshandsfoundation.org](http://www.diabeteshandsfoundation.org) [102]
- [www.tudiabetes.com](http://www.tudiabetes.com) [103]
- [www.prweb.com/printer/546849.htm](http://www.prweb.com/printer/546849.htm) [104]
- [www.thomaslfriedman.com/bookshelf/the-world-is-flat](http://www.thomaslfriedman.com/bookshelf/the-world-is-flat) [105]
- [www.EsTuDiabetes.com](http://www.EsTuDiabetes.com) [106]
- [www.youtube.com/tudiabetes](http://www.youtube.com/tudiabetes) [107]
- [www.facebook.com/pages/Diabetes-Hands-Foundation/47626785859](http://www.facebook.com/pages/Diabetes-Hands-Foundation/47626785859) [108]

# IDeA: Communities of Practice

Supporting online collaboration and innovation in local government

Communities of Practice for Local Government is a website that supports collaboration across local government and the public sector. It is an institutional initiative by the Improvement & Development Agency for Local Government (IDeA) centred on a specially developed web platform for user-generated content. It is a freely accessible resource that enables like-minded people to form online communities of practice using collaboration tools including [blogs](#) [2], [wikis](#) [2] and [social networks](#) [2]. It encourages knowledge-sharing and learning from each others' experiences, and the fundamental aim is 'helping conversations to happen'.

The 'Communities of Practice' (CoP) project began four years ago and the first 18 months was devoted to designing, building and testing the system. It now has a core team of four facilitators plus a contractor for web development and support. The users – mainly local authority officials – now number more than 30,000, 16% of whom are active participants. Between them the members have set up over 800 CoPs to allow knowledge and experiences to be exchanged between specialists and novices nationally and, increasingly, internationally. In 2009, the site won a Government Computing Award for Collaborative Working.

Local councils are independent and geographically distinct organisations with locally determined priorities, yet they deliver a common range of services in a common framework and there is hence an enormous opportunity to share and develop good practices collectively, there is a tendency towards Do It Yourself and reinvention.

The development of practice-sharing has involved a range of new techniques which have become embedded in local government and have been adopted by other parts of public sector. Perhaps the most important is peer review where leading local authority practitioners, both political and managerial, review and challenge the performance of councils against an agreed best practice benchmark.

In 2005, IDeA's website – IDeA Knowledge – advertised events, workshops and publications in the traditional fashion, but they began exploring the possibility of using new [web 2.0](#) technologies to increase engagement and help councils share best practice. As a result they decided to invest in creating their own platform.

IDeA's Director of Services, John Hayes, says: "For me, what is really exciting about Web 2.0 is that for the first time you can see what's happening. You know who is involved, what they are interested in and how they react to something. Just as importantly, given the defined nature of local government, you know which people you are missing and where programmes and activities are not having an impact. From an improvement point of view it has the potential to provide real and powerful feedback".

Working with their existing technology partner IDeA Knowledge, a team of four enthusiastic IDeA staff was set up to train prospective users and facilitate online knowledge-sharing by them.

An IDeA online community of practice can be set up by anyone in local government for any kind of practice improvement. IDeA support is available but using it is not mandatory. And CoPs are not just a tool for IDeA programmes: for example, staff at Kent



County Council have become expert users and have set up a whole series of CoPs as part of their Kent Innovation programme.

The most active CoPs are those which address a particular technical issue – like the Mapping Services Agreement – or a specific professional community such as the planners and their Permitted Development Community. The same applies to groups where current information is really important – for example the Policy and Performance Community.

Although subject matter is important, IDeA is also learning about how to help conversations to happen. Online conferences have been a particular success in this regard. Just as with a face-to-face conference, the event is promoted in advance, content is prepared and speakers are lined up. Some of these online conferences have generated involvement from many hundreds of participants and initiated contacts between them which persist after the event.

The Communities of Practice site went live in September 2006 and so far around £1 million has been spent on development and support. Take-up has exceeded expectations in terms of headline numbers. Over 550 CoPs have been started to date. There are now over 20,000 registered members of the platform and they have downloaded 64,000 documents in the last year. Membership is increasing by over 80 per day, or nearly 2,000 per month. There are about 30,000 visits per month and in a typical month over 3,700 members log in on multiple occasions.

For Lawrence Hall, who monitors performance and impact for CoPs, it's definitely not simply about the headline numbers. "The number I want to see improve is the proportion of active users ... those people who frequently contribute to discussions and edit wikis and so on. At the moment they account for about sixteen percent of the total. This is better than the industry norm of ten percent but I want to see the proportion get even higher."

There are issues of inclusion and of skills gaps too. John reflects that: "People who are happy to communicate to hundreds of people via e-mail suddenly get writer's block when it comes to publishing their views on a CoP. It may be an age thing. Younger people, or digital natives as they are called, find that contributing to an online community of practice is a natural thing to do. On the other hand, my generation, which is over-represented in local government, finds it harder."

John's vision for developing IDeA CoPs is to go more towards being a blend of the most effective features of blogs, social networks and wikis [2].

He sums up: "I want to see participation in CoPs being very immediate and merging into ordinary conversation. The degree of change looks scary. But remember that ten years ago e-commerce was also very new...."

## See also

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- [www.communities.idea.gov.uk](http://www.communities.idea.gov.uk) <sup>[109]</sup>
- [www.idea.gov.uk](http://www.idea.gov.uk) <sup>[110]</sup>

# Savvy Chavvy

How social networks can bring a new sense of community to excluded groups

This social network has evolved in an unusual way. It started in early 2008 as a citizen journalism training initiative for marginalised communities. Funding of £82,000 was provided to enable 50 young Gypsies and Travellers to use social media, and a website using the free Ning platform was used to link the widely dispersed students with their trainers and each other.

Within two months many more Gypsies had signed up to the discussions as the users themselves decided to use the site as their own private social network. These young people are subjected to racist abuse, and rather than broadcasting their stories in public, what they needed was a private space to socialise. The award-winning Savvy Chavvy site now has 2200 members – a high proportion of the Traveller community – and is widely used for exchanging photos and video clips and joining campaigns. Natural leaders have emerged who have now been trained to administer and moderate the site.

The term ‘chavvy’ is a traditional one for a young Gypsy or Traveller, and savvy means smart. The Savvy Chavvy project was originally designed to help young Gypsies and Travellers find a stronger voice in the world by using social media by producing podcasts and videos about their communities.

The Mediabox fund provided support via UnLtd and Media for Development, and On Road Media was commissioned to identify five partner Gypsy groups, buy equipment for each group, carry out five week-long training courses for 50 Gypsies and to provide ongoing support once the network was up and running. UnLtd gave awards of £1000 to each group to produce ten short films between them, and Mediabox matched this funding. The total funding to date has been £82,000, of which less than one tenth was spent on equipment and insurances.

Nathalie McDermott of On Road Media led the first phase of the project with five months of funding from December 2007 to April 2008. Nathalie is a consultant who specialises in working with marginalised communities, introducing them to new technologies and giving them the skills to use them. Most of the equipment was loaned free of charge. The two trainers also provided equipment for videos and podcasts – Olympus audio recorders and Sanyo Xacti cameras, laptops – at an approximate cost of £1000 per group.

While they succeeded in training fifty young people to produce compelling content, they soon found the project taking a different direction, and a life of its own. The young people found their voices – but preferred to converse in the safe space of a closed online social network <sup>[2]</sup>, where they would not be subjected to the racist abuse commonly applied to Gypsies on the open web.

In each case the young people had to be associated with a social hub – a youth group or school – so that they could have a sustainable way of carrying on with citizen journalism activities. The project team had set up an online site on the free [social networking](#) <sup>[2]</sup> platform [Ning](#) <sup>[7]</sup>, and the young people quickly started to produce and share rich content on a number of different themes. These included what it is like to live on a camp site, the history of Gypsy and Traveller communities, and boxing – a strong tradition among these communities.

The site soon started to reach beyond the original fifty members and attract other young Gypsy people to sign up and join in discussions. During month two of the project, the participants decided to accept the change in direction as a reality and make Savvy Chavvy a social rather than citizen journalism space. The video equipment is still available for use but it is no longer the main focus of the project.

Nathalie explains: *“Savvy Chavvy has become a social network where people do all the things that social networks are so good at supporting. They have brilliant discussions, they posts photos, video, they do everything that young people do well. They flirt with each other, they make friends, they make connections.”*

*“But they are also doing serious things – like having discussions about racism, bullying and Travellers dropping out of school. They run campaigns about sites that have been closed. It is a hotbed of activity for young Gypsies and Travellers in a safe space which they don’t have elsewhere on the web – which I think this is one of the main reasons it took off.”*

About 2200 people had registered on the site by November 2008. Nathalie observes: *“It may not sound like a large number of people, but for the travelling community, which is a relatively small one, it is huge number and they are heavily using the site.”*

Nathalie believes that one reason why the site has grown rapidly is because it is ‘owned’ by the users. Originally – during the citizen journalism phase – the administrators were to have been youth leaders. However, natural leaders have now emerged from the online community itself, and they have been given training both in site administration and on how to deal with difficult situations online. To start with there were problems with open registration because people were subjected to racist abuse from non-Gypsies joining the site. The newly skilled administrators and facilitators have evolved rules for the site and instituted a registration system designed to ensure that only young Gypsies and Travellers can participate.



*"It's great to have a site where you feel comfortable and safe discussing these things," says Rosina Hughes, a 17-year-old from Wareham, Dorset. "You're all dirty" and "you're all scum", are some of the racist responses she says she has received on other social networking sites. "They have Gypsy hate groups, so it's important that we have our own space", she says.*

Savvy Chavvy is not just a success in the eyes of those using the site. The site has gained national media coverage, and in July 2008, Prime Minister Gordon Brown presented Savvy Chavvy with the Catalyst Community Award for innovative use of social technology to support communities. And the Guardian praised Savvy Chavvy for reclaiming the term 'chav' from its use as a term of abuse. Although it failed to create a network of citizen journalists, the project has succeeded in giving excluded young people a voice – by giving them a place to be heard.

Nathalie concludes that at the beginning of a project like this it is essential to spend plenty of time developing meaningful and authentic relationships with partner groups within the community. This part was rushed for Savvy Chavvy because of the timetabling requirements of the funding agreement. Nathalie now feels that this was one of the reasons for the citizen journalism part of the project has not been continuing as the network flourishes. *"The site would not have worked if it had been a way of showing other people what Gypsy lives were like. Young Gypsies do not want to feel they are in some sort of zoo. What they needed was a safe space to build their own community."*

Savvy Chavvy has provided a place where the users have been able to reclaim the term 'chav' as their own traditional description of a young Gypsy or Traveller. During development of the social network [2], new volunteer facilitators and ambassadors for its work have emerged. With additional training they have set their own rules for access. These newly skilled facilitators and users are displaying great enthusiasm and commitment. Nathalie believes that this, and the free nature of the Ning [7] platform, means that the Savvy Chavvy project has a strong chance of sustaining its activity now that external funding for the project has ended.

## See also

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- [www.sawychawvy.com](http://www.sawychawvy.com) <sup>[111]</sup>
- [www.blip.tv/file/1491204](http://www.blip.tv/file/1491204) <sup>[112]</sup>
- [www.media-box.co.uk](http://www.media-box.co.uk) <sup>[113]</sup>
- [www.unltd.org.uk](http://www.unltd.org.uk) <sup>[87]</sup>
- [www.mediafordevelopment.org.uk](http://www.mediafordevelopment.org.uk) <sup>[114]</sup>
- [www.onroadmedia.org.uk](http://www.onroadmedia.org.uk) <sup>[115]</sup>
- [www.ning.com](http://www.ning.com) <sup>[116]</sup>
- [www.snurl.com/7izos](http://www.snurl.com/7izos) <sup>[117]</sup>
- [www.ukcatalystawards.com/winner6.html](http://www.ukcatalystawards.com/winner6.html) <sup>[118]</sup>

## Nathalie McDermott's lessons from the Savvy Chavvy project

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- Make sure the existing leaders in the community understand and embrace what is planned - but do not expect them necessarily to be the leaders online.
- Be prepared for the community to reshape the objectives. It will thrive if it meets real needs, and ambassadors will emerge.
- Investment in people - their training and support - is more important than investment in technology.
- Keep it simple, and make sure that when people go home after training they can do everything for themselves without further training.
- Keep the ongoing costs of the technology low, and if possible free.
- Sustainability is achieved through low costs and ownership of the project by the community.
- Be prepared to use commercial platforms to achieve this, rather than bespoke sites that require continuing technical support.
- Do not assume that marginalised communities will necessarily want to build communication bridges to the mainstream. They may be more concerned about creating a safe space for themselves.

## Talk2Croydon

Local citizen participation tools from the ground up

Talk2Croydon is an innovation in e-democracy which launched in 2007. It is an interactive website created by a multi-agency team with the aim to support grassroots public engagement in local decision making. The site is managed by Croydon Voluntary Action and is supported by local public sector partners in Croydon.

Despite setbacks and false-starts including the first development team pulling out, the resulting £10,000 site now supports user-generated content on local issues, debates, polls, user-posted videos and games. The success of the initiative has been

recognised by national and international awards. Membership has grown to over 1,500 and a second site especially for children was launched in 2008.

The idea of using online media to foster citizen empowerment in Croydon was hatched in 2002 by non-technical people in the local voluntary action team, long before the 'Communities in Control' Empowerment White Paper. Croydon's Community Involvement Strategy Group (CISG), a multi-agency partnership of community involvement leads, identified a need for a single 'hub' for engagement activities. A web-based solution would enable all the partners to participate and attract audiences from groups often excluded by mainstream engagement techniques.

Jo Gough was responsible for the project together with project lead, Sarah Taylor. "Talk2Croydon serves and brings together two audiences; first, the community of local practitioners – paid people or volunteers engaged in work that strengthens civil society – and second, the general public. The technology just eases the way."

Enthusiasts on the CISG were aware that existing efforts to connect the council, local health bodies and voluntary sector were not satisfactory; they knew what was missing and wanted to do things better. At that point Jo came across an excellent booklet on community involvement and equality that seemed to offer many of the answers. "It had been produced some 12 years earlier and needed updating. We thought, why not do it as an e-book? It became a massive interactive project." However, the project's first technology developers found this too difficult and pulled out. The scope for the technology was just too big.

Despite this setback the team still believed in the concept of Talk2Croydon as a community empowerment tool. Starting again in 2005, they drew up a set of guiding principles that they called 'Croydon Community Involvement Commitments'. The Council, Croydon Primary Care Trust and Mayday Healthcare NHS Trust signed up to the guiding principles and all partners agreed a contribution to fund the project. Consensus was achieved in the form of a 'compact' between the voluntary and the statutory sectors in the borough. The site would exist firstly to provide a multi-agency intranet with toolkits and discussion groups for practitioners; and secondly, a public engagement space to foster community involvement. Targets were set to meet the funders' expectations. The project was seen as a clear step towards compliance with new 'Duty to Involve' legislation, at minimal cost.

A project steering group was set up, including council officers, representatives of the PCT and hospital with Croydon Voluntary Action (CVA) leading and co-ordinating the development. CVA provided a project lead for one day per week. Under the strategic direction of the CVA Board, the CISG sets the direction of the project and delegates implementation to Jo. "It must be multi-agency but we check our direction by asking 'does it fit with CVA's mission?' There is constant negotiation, not least because of the high turnover of staff in the public sector."

Jo set out to find the right technology partner who could help her team harness the power of technology as a democratic tool. Advice from other colleagues in her field indicated that e-democracy agencies were charging large fees for constructing such sites. Then she got a personal recommendation to a developer who was already engaged in community involvement, using the open source community framework Drupal.<sup>[7]</sup> "He not only had the technical know-how but also understood our aim."



It cost £10,000 to bring Talk2Croydon into existence. CVA owns the domain name; the developer, Code Positive, hosts the site under a service agreement that allows some site changes over time. The site was built on the out-of-the-box Drupal [7] infrastructure of user profiles, discussion and comment functions, RSS feeds and other community tools, but was then fully customised to the needs of the users and the commissioners. Over 90 local people from all walks of life took part in developing the specification.

The site was launched in September 2007 and within the first month had 169 registered members. Talk2Croydon exceeded its initial funders' target of 3,000 visits, achieving 7,000 visits by more than 3,500 unique visitors. Five hundred members were needed by March 2009; in fact over 1200, including 36 practitioners, had already signed up by December 2008.

Talk2Croydon is the virtual face of a government agency and can be accessed by anyone. Accordingly Jo and Sarah have administrator's rights so they can monitor the site and can filter out any user-generated content that could be seen as offensive. There have been some unexpected outcomes, but generally positive ones. For example, a campaign about trees has provoked a great deal of interest.

"We realised the potential fairly quickly ... and saw an opportunity to extend the reach to under-sixteens. But the site was not jolly or jazzy. So Croydon Xpress, our children and young people's participation project, funded a secondary site which is called KidsTalk2Croydon. There you navigate by clicking on bubbles – 'What matters to you?', 'Playing games', 'Staying safe', and so on."



The discussion areas are very active. Some eight to eleven years olds from deprived housing estates have one for discussing their school project work. Another is called 'Peppermints in Danger' – about a local community centre that may be closed. The site helps mobilise peers and enables participants to

reach practitioners to improve the situation for themselves and for other children.

In the four years since the initial grant of £10,000, Talk2Croydon has evolved into the focal point of electronic public engagement for all the public agencies in Croydon. The council leaders acknowledged this by personally launching KidsTalk2, prompting Jo to seek a second tranche of funding to cover the on-going costs of hosting and service support. In parallel, negotiations are in hand with the local police to sign up to the Commitments and start using Talk2Croydon. The next planned step is to partner with a local group of General Practitioner surgeries who will use the Talk2Croydon tools to involve patients in the improvement of the surgeries.

In 2008 the site won recognition from the International Centre for Excellence in Local Electronic Democracy (ICELE) for providing the public of Croydon with the means to raise concerns, campaign and vote on decisions.

When asked to describe 'success', Jo muses: "Croydon is known for its trams. For me the success of Talk2Croydon would be overhearing, on a tram journey, passengers talking about the site. It is Talk2 becoming part of the life-blood – an ephemeral part of the borough that belongs to them."

## See also

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- [www.talk2croydon.co.uk](http://www.talk2croydon.co.uk) <sup>[119]</sup>
- [kids.talk2croydon.co.uk](http://kids.talk2croydon.co.uk) <sup>[120]</sup>
- [www.cvalive.org.uk](http://www.cvalive.org.uk) <sup>[121]</sup>
- [www.codepositive.com](http://www.codepositive.com) <sup>[122]</sup>

## FreqOUT!

Giving excluded young people a voice by using the right technologies

FreqOUT! is a citizen empowerment initiative to engage with young residents of deprived London neighbourhoods in order to raise their self-belief and help them acquire life-skills and employability. The project, funded by a partnership committed to positive change, enables its participants to learn – from volunteer activists – innovative ways to use communications technologies such as mobile phones, GPS tracking and an AV edit suite. These, together with a social network on [Facebook](#) <sup>[7]</sup>, [Bebo](#) <sup>[7]</sup> and [MySpace](#) <sup>[7]</sup>, are enabling the creation of individual and collective art works that have already been showcased in world class institutions.

The project's success is measured in terms of recruitment, retention, individual learning plans, opportunities created and routes to employment. The project was launched three years on from the original idea, and benefited some 500 participants in the first six months. Building on this, FreqOUT! is now poised to increase capacity and reach out to young people in other disadvantaged communities.

FreqOUT! was initiated in 2005 by Vital Regeneration, an agency working for positive change in

London's most deprived neighbourhoods, in collaboration with a group of private, public and voluntary sector partners and independent artists. 44% of the project's beneficiaries are aged 14-16 with males slightly outnumbering females. 65% have a Black & Minority Ethnic (BME) background compared with a figure of about 8% in the overall population.

The City of Westminster in Central London is home to Parliament and many other major institutions – but its boundaries also contain pockets of abject poverty. Many children and young people live in overcrowded social housing or hostels, affecting their educational, social and emotional development. On the other hand, they have a keen interest in social networking [2] sites like MySpace [7], Bebo [7] and Facebook [7] where they manage their social life. Mobile technology is a major influence and they constantly use their mobile phones to download free music, video clips and images.

Jenny observes that typical FreqOUT! participants tend to be “voracious consumers of celebrity culture. They can lack practical education which can make them vulnerable to online bullying and isolate them from opportunities in life many of us take for granted. They need solid role models to guide them in both the on- and off-line world, the boundaries of which, for them, become increasingly blurred.”

FreqOUT! employs communications technologies as ‘props’ in a process that offers young and troubled people an alternative to drug culture by raising their self-esteem and aspirations, and enable them to acquire skills that will make them employable. They offer a rolling series of three-month projects and facilitates links with local Further Education Colleges offering accredited programmes. As well as using web 2.0 [2] technologies, they pioneered use of Westminster's ‘Wireless City’ infrastructure, originally designed by employees of the local authority to provide improved city management services.

Following pilot projects, FreqOUT! secured its first large high profile showcase at the Institute of Contemporary Art in October 2005. Project beneficiaries had walked around their housing estate carrying GPS devices. When the positioning signals were picked up and superimposed onto Google maps they clearly showed the popular zones and, in stark contrast, the areas where local young people are frightened to go.

Projects since then have included ‘Video Sniffin’ led by artist collective MediaShed – using free wireless networks and CCTV signals to make films, with youth-led subject matter. Another example involved using MP3 players to record and edit community interviews, sounds, stories and music. The resulting ‘sonic artworks’ were broadcast from local shops for audiences including voluntary organisations, community health groups, Westminster politicians, local artists and members of the public.

Building on this, 210 young people participated in FreqOUT! projects in 2007. For example, the BBC commissioned a team of 64 FreqOUT! beneficiaries to use their mobile phones to produce Mobile Movies and deliver these across five cities using Bluetooth. During 2008 they ran 10 projects and have developed links with the Science Museum, National Portrait Gallery, Photographers Gallery and the English National Opera, introducing local young people to world class institutions on their doorsteps which they would not usually think of visiting.

In July 2008 they won the 2008 ‘Chalk and Cheese’ UK Catalyst Award, presented by Prime Minister



Gordon Brown, for using mobile media as platforms and magnets for new and innovative learning.

One of FreqOUT!'s specialist roles is the recruitment of target beneficiaries. This requires a wide-ranging approach to engagement, employing strategies such as viral text messaging, [social networking](#), [online marketing](#) and, of course, word of mouth.

**“Activity is peer-led to encourage ownership of projects with many FreqOUT! beneficiaries progressing into peer mentoring roles to share experiences and assist with behaviour management issues.”**

There have been challenges along the way for FreqOUT!; the path to success is rarely easy. Recruitment of excluded groups is always a challenge; turning up to sessions can be difficult when young people have so many other issues in their lives. Projects that are most successful in engaging with the user group are those that inspire and excite, but also those based on technologies that the beneficiaries can identify with and master. These include mobile and wireless communications, GPStracking, Bluetooth and [social networking](#) [2]. All the successful projects use delivery methods that are inclusive, sensitive and adapt across the lifetime of the project.

**“We try to remove barriers. For example, the Science Museum commissioned FreqOUT! to recruit and support 10 young Bangladeshi women to a week-long intensive project during October half term 2008.”**

Jenny's time is funded by Vital Regeneration and she manages a range of associate artists, support staff, interns and volunteers to deliver high quality digital creative arts programmes. Initial funding raised £10,000 to pay for a creative suite including; industry standard film equipment, a professional editing facilities and audio-visual software. For each beneficiary, completing a 2-day technology intensive course costs £200, whilst each Open College Network qualification costs £750. Projects also benefit from specialist equipment hired or donated by associate artists, whose skills and experience allows beneficiaries to obtain truly unique experience. Invaluable support has been offered by high profile guest speakers such as Dr John Bird, founder of *The Big Issue* magazine, and a number of leading professional filmmakers, editors and online digital specialists have donated their time and expertise.

FreqOUT!'s funders require an annual evaluation of service delivery using measures such as numbers recruited from specific socio-demographic groups, retention rates, the quality of learning in line with the Common Inspection Framework and the range of opportunities and destinations created for beneficiaries such as exhibitions, volunteering, work placements and progression routes into further learning or employment.

Jenny sees the project's success on many levels. “FreqOUT! is about empowerment and voice – people in an excluded community are not usually listened to. ... We're bridging the digital divide by enabling participants to access technology, be innovative and think for themselves. In turn this enables control of their lives that can be extended to areas such as managing finances, applying for jobs or accessing other service provision.”

Her advice for others attempting a similar project is clear. “Growing the capacity is the biggest issue for any community project. Be open about how much resource is needed ... or you will become stretched and this is likely to be detrimental further down the line. Listen to

what the community is asking for, regularly consult community leaders and get funders on board to understand and communicate the real support needed by the beneficiaries to remove barriers to engagement.”

The next stage for FreqOUT! will be to increase the project capacity and reach and work with a greater range of partners across London for the benefit of more disadvantaged communities. “After all, the initiative is completely mobile.”

## See also

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- [www.vitalregeneration.org/freqout](http://www.vitalregeneration.org/freqout) <sup>[123]</sup>
- [www.vitalregeneration.org](http://www.vitalregeneration.org) <sup>[124]</sup>
- [www.spacestudios.org.uk](http://www.spacestudios.org.uk) <sup>[125]</sup>
- [www.independentphotography.org.uk](http://www.independentphotography.org.uk) <sup>[126]</sup>
- [www.arts council.org.uk](http://www.arts council.org.uk) <sup>[127]</sup>
- [www.centrepont.org.uk](http://www.centrepont.org.uk) <sup>[128]</sup>
- [www.firstlightmovies.com](http://www.firstlightmovies.com) <sup>[129]</sup>
- [www.uk.capgemini.com](http://www.uk.capgemini.com) <sup>[130]</sup>
- [www.bigissue.com](http://www.bigissue.com) <sup>[131]</sup>
- [www.nesta.org.uk](http://www.nesta.org.uk) <sup>[132]</sup>

## How to use social media to engage hard-to-reach groups

By Jenny Irish, FreqOUT!

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1. Consult early with project partners to ensure alignment with real social need so as to optimise success.
2. Set up a diverse, multi-disciplinary governance group which will provide ideas and networks in the development of social media projects.
3. Market innovative projects clearly using language and tactics, such as peer mentors, that target groups understand.
4. Viral marketing and social networking sites raise interest – but person-to-person relationships are the key to engagement.
5. Use mobile technologies to your advantage – as they allow you deliver projects in places where target groups feel comfortable; this builds trust and aids retention.
6. Ensure the social media is used to encourage hard to reach groups to have their voices heard; articulate their opinions, and in doing so build their confidence.
7. Link the project to meaningful pathways for the participants to progress/use the experience as a spring board to further opportunities.
8. If attention wanders, use mobile technologies to get mobile!

## Patient Opinion

Using the power of the internet to give NHS users a voice

This campaigning and citizen empowerment initiative was ahead of its time. Five years ago the government was pressing the NHS to measure and report performance against targets. A GP-cum-social entrepreneur saw the opportunity to use the new interactive online tools to enable patients and their families to give first hand feedback directly to the responsible NHS person – and their MP. In 2005 the idea was awarded a 9-month government contract of £230,000 for development.

The resulting service, Patient Opinion, enables people to send their views to a website or via an 0845 number or on a postal form. So far 9,000 have done so and 55 Primary Care Trusts have signed up for the £8,000 per annum service, making the project self-financing. Some mid-level NHS staff have seen it as a threat but, in fact, a majority of responses express gratitude. In April 2009, Patient Opinion signed contracts with Capita to become the national website for feedback on mental health services.

New technologies have been revolutionising banking, music and the media for some time, but now the changes are even reaching the National Health Service – from the new wealth of information available to both patients and doctors, to mobile phone video clips of hospital incidents on [YouTube](#) [7] and unflattering pictures of NHS toilets on [Flickr](#). The new capabilities of mobile technologies and [web 2.0](#) [2] are enabling people to respond, discuss and participate in their own health care. They allow patients' voices to be heard.

In 2004, before these technologies were widely discussed in the press or public services, Dr Paul Hodgkin proposed an interactive website for patient opinions to the Department of Health. At that time the NHS was managed by macro-level targets. The idea of Patient Opinion was to create a space where patients and carers could rate the service they had received, and share their stories and experiences of the NHS.

“While some of the audience for my Patient Opinion proposal found the technology fascinating, 70% were sceptical. They asked why do people need or want it; will the results be any use?”

But Paul's track record as a medical practitioner and social entrepreneur persuaded the panel to agree cautiously that he could explore the concept further. In January 2005, the Department of Health and his local Strategic Health Authority awarded a £230,000 contract to design and develop a website for gathering and processing patient feedback. The resulting service had to become self-financing within eighteen months.

Paul was joined by James Munro, also a public health doctor. The first nine months were focused on market analysis in preparation for technical development, and consultations revealed that NHS Trust Chief Executives could appreciate the potential value of the democratisation afforded by these new technologies.

Paul sees the web as driving down the cost of interaction to near zero, which makes it easier to engage directly with individuals. “Web 2.0 is citizen-centred and offers cheap tools ‘delivered to your home’. Patient Opinion is a place for expressing personal worries and micro aspects of care. It offers collective wisdom while, at the same time, it is very localised in terms of feedback and influence.”

Patient Opinion is a platform for conversations about issues. It is not solely about feedback or data or service improvement – even though all these are an outcome. Anyone can view the stories on Patient Opinion. Organisations that subscribe can post responses – as can Members of Parliament and health-related charities like Asthma UK.

Feedback is targeted to precisely the appropriate NHS manager. These managers can set [RSS feeds](#) so they receive only the postings relevant to their responsibilities, and Patient Opinion's data analysis tools enable them to benchmark their service's ratings against comparator sites.

As Paul points out "... the concerns of one hospital will differ from others. You want your conversation to hit the four or five relevant people and the Minister. And because each story is post-coded it will also reach your MP."

Roll-out of the completed and tested website started in early 2006 and by the end of 2008 over 9,000 stories had been shared by patients. Today Paul has a team of five full-time equivalent staff supplemented with three NHS consultants who each give three days per week.

Money is not the main driver for the project and there is no advertising. But already, 55 NHS Acute and Primary Care Trusts each currently subscribe £8,000 per annum for the service. This allows the project to break even. "Patient Opinion is not dependent on big grants; 95% of income is from subscriptions ... but cash flow is always an issue."

A key realisation was that not every patient has 'on demand' access to the internet. Accordingly Patient Opinion also allows people to give their opinion by filling in a pre-paid postal form or by using an 0845 free-phone number. Submissions via these channels are transcribed by Paul's office staff. In practice 30% of patients fill in a form, 5% use the 0845 number and 65% use the web.

"Web commerce is desire driven whereas classic health behaviour on the web is driven by anxiety or gratitude or the search for information or support." And, contrary to the apprehensions of middle managers, over 50% of all submissions have been to express gratitude for the health care they or their loved ones have received. In fact, fewer than 20% have been critical and on very few occasions has offensive language had to be removed. "I'm glad to say that the majority of conversations on Patient Opinion are 'us-driven'. And this is breaking down institutional inertia."

Paul believes Patient Opinion has proved itself to be both innovative and valuable. "The NHS simply can't innovate as fast ... but we do see that PCTs are learning the conversational style of response. Using the new tools, we've achieved 80% of our goals. The remaining 20% is about scaling up. We do have a national profile with about 70% of the UK covered. But we are still working at it because some regions are better represented than others." The expected signing up of 70 mental health organisations will improve the geographical spread.

Paul's vision is to build Patient Opinion into a national platform where hundreds of thousands of people can have a conversation about care. In 2007 the Department of Health decided to create its own version of have a conversation about care. In 2007 the Department of Health decided to create its own version of Patient Opinion. Paul has neither helped nor hindered. "Let them succeed; these wonderful tools allow for enough diversity."

## See also

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- [www.patientopinion.org.uk](http://www.patientopinion.org.uk) <sup>[133]</sup>
- [www.sse.org.uk](http://www.sse.org.uk) <sup>[134]</sup>
- [www.dh.gov.uk](http://www.dh.gov.uk) <sup>[135]</sup>
- [www.yorksandhumber.nhs.uk](http://www.yorksandhumber.nhs.uk) <sup>[136]</sup>
- [www.asthma.org.uk](http://www.asthma.org.uk) <sup>[137]</sup>
- The Long Tale: public services and Web 2.0 by Paul Hodgkin and James Munro (2007), Consumer Policy Review, Vol 17, No 2

# The Social by Social propositions

Our collaborative manifesto for successful social by social projects

by **ANDY GIBSON, DAVID WILCOX and AMY SAMPLE WARD**

We are all still explorers of the ways that social technology can catalyse social change and support social innovation. We have tried in this handbook to provide some practical guidance on what's worked and what hasn't in various situations, and help newcomers take their first steps into this uncertain new world. But how can we cast a light forward, start some fresh conversations on what might be appropriate, what might be achieved?

We believe that there are some common principles and guidelines that underpin all the successful projects we've seen, and which might be applied to all 'social by social' projects. We have framed these as Propositions, a set of rules, tips and things to remember along the way. This is a new field – so there are no simple recipes. We hope that the Propositions below will be triggers for a fresh round of conversation about what works, what doesn't, and what is common to all this work and can be shared by all of us.

What follows is in fact the second public draft of these propositions. True to our principles, we offered up our [initial 45 propositions](#) <sup>[138]</sup> to public scrutiny in April 2009 and got initial feedback and suggestions from our readers before we committed them to print. The general feedback was positive, but people were also overwhelmed by the long list of advice. So, we've cut and merged a few, and then given them a loose structure to make them easier to follow. Thanks to everyone who picked their favourites and suggested categories and structures for organising them. In the end we've plumped for Al Robertson's '3-Act Structure', which seemed to make sense of them in a messy, human sort of way.

## ACT I

**1. Give up on the illusion of control.** In a networked world, organisations can no longer

control what people think or say about them. If you're worried, get involved.

**2. People make technology matter.** Think about mindset, language and skills before you think about tools, features and screen designs. Don't jump for the tool.

**3. People want control.** If you give them tools for taking more control of their lives, they will pay you back in attention, support, promotion and even hard cash.

**4. Never assume, always ask.** You can't know what your community wants from you without asking, and they are waiting to be asked. Be specific, define the issue and let the answers pour in. Then be transparent about your next moves.

**5. Go where people are.** Experienced users have plenty of existing places already, and newcomers are difficult to recruit. Go to them and engage them on their terms.

**6. Respect how they choose to communicate.** Some will write, others will take pictures or make movies. Most prefer questions and conversations to tedious reports and 'consultations'.

**7. Content is king.** Providing great content – resources, information, stories, connections, conversations – means new users will find you and others will stick with you. Give people easy ways to share this content too, freely and openly.

**8. Learn to listen before you start talking.** Good conversations require good listeners more than good talkers. Listen first to find out what people want to hear.

**9. Be consistent.** Whatever you say in public, remember you are talking to everyone, all the time, so stay true to your principles.

**10. The world is a noisy place.** Respect people's time and contribution, and be direct, open and honest to get their attention.

**11. All energy is good energy.** If people are taking the time to criticise you, they are already engaged. Listen to their concerns and find ways to bring them in.

**12. Know your limits.** Technologies can solve information problems, organise communities and publish behaviours, but they can't deliver food or care for the sick.

## ACT II

**13. You can't learn to fly by watching the pilot.** If you want to understand new technologies, start using them. Dive in.

**14. Start small.** It's always better to build too little than too much. Beware of specifying costly systems until you are absolutely familiar with the tools and know how people would use them.

15. **Start at the top.** Get the boss blogging or talking on film.
16. **Keep it simple.** Every time you add a feature to your toolset, you make the existing features harder to use, and exclude more people.
17. **Keep it messy.** Design to create conversations, gossip and coincidences, not to organise information. If everything's neat and tidy, it's because no-one's there.
18. **Keep it sociable.** If you want action, leave room for social interactions and personal stuff, not just worthy, productive topics. Playful, human interactions build trust.
19. **Keep your powder dry.** Set aside as much money for design, copy and user testing, and as much for marketing and community engagement, as you do for software and hardware.
20. **Be a pirate.** There's so much free stuff out there just waiting for you. Make use of what others have shared and save your energies for what you're best at.
21. **Don't centralise, aggregate.** Do you really need data centralisation? Well do you? Use lots of disconnected free and cheap tools and then pull the content together into a central branded location.
22. **In user-centred design, everyone is right.** Design for who your users really are, not how you'd like them to be. Evolve systems with the people who will use them, and respect their criticisms.
23. **Choose your words carefully.** Get the language right and use copy sensitively and sparingly, or you can quickly put people off.
24. **Eat your own dogfood.** You can't influence the community if you aren't in it. Besides, if you aren't using your own services, why would anyone else?
25. **Don't forget the tables and chairs.** If you want people to communicate or collaborate online, bring them together face-to-face too.

## ACT III

26. **Expect the unexpected.** Develop tactically, evolving as you go, and find cheap ways to try your ideas out in real situations before committing precious resources.
27. **Be a good host.** Make people feel comfortable, then get out of the way.
28. **Follow the leaders.** Support the early adopters rather than chasing the sceptics, and they will become your evangelists. And attitude beats ability when tools are cheap and easy.
29. **Be realistic about who will create content.** It's about the same proportion as put

their hands up at question time, so learn how to create good invitations and small, actionable opportunities.

**30. Your users own the platform.** If they really do own it, they will use it, trust it, help sustain it, find ways to improve it; if they don't, no amount of 'marketing' will help.

**31. Empowerment is unconditional.** Telling people what they can and can't do with their platform is like an electricity company restricting what its power can be used for.

**32. Sunlight is the best disinfectant.** The more you open things up, the less risk there is of damage to your reputation. Encourage people to moderate themselves.

**33. Let users solve their own problems.** As the amount of work grows, so does the number of workers. Help them help you.

**34. Empty rooms are easier to redecorate.** Be fast and loose with evolving your platform in the early stages, but be cautious of changing things once people start relying on it.

**35. Everything has a cost.** Although many online tools are free, everything costs time if not money. Find ways to get your money back right from the start.

**36. Don't confuse money with value.** Look at the other assets you have in your community – skills, volunteers, goodwill – and put them to use in sustaining it.

**37. Failure is useful.** If you want to know what works, learn from what didn't.

**38. Say thank you in public.** People don't need to have something hand-written on headed paper to feel recognised. Use your tools to acknowledge the people who helped make them in a visible way.

We hope that these propositions will be the starting point for a new conversation, maybe a new mindset. We may be wrong. And that's fine. But we believe we should all be thinking about these things in relation to our projects, and sharing what we've learnt.

**Agree?** Great! Sign up to support or comment on these propositions by commenting [here](#).

**Disagree?** Great! Tell us your views and start a better conversation.  
Or **remix** them or **write your own**...

## A to Z of key terms

A guide to all the jargon and concepts you need to know

by **DAVID WILCOX** and **AMY SAMPLE WARD**



# Jargonbuster

**Struggling to get your head around a bewildering array of new terms and technologies?** Here's a handy guide to the most common and important terms you may need to know. We suggest you don't try to memorise it all at once, but use it for reference and reminders. You should also read it alongside the more general list of [key concepts](#) <sup>[139]</sup> that follows, and also the list of [essential tools](#) <sup>[140]</sup> in the Companion later.

**A-B testing** is a website optimisation technique that involves sending half your users to one version of a page, and the other half to another, and watching the [web analytics](#) <sup>[2]</sup> to see which one is more effective in getting them to do what you want them to do (for example, sign up for a user account). It can be a great tool for [evolving your platform](#) <sup>[141]</sup>.

**Aggregation** is the process of gathering and remixing content from [blogs](#) <sup>[2]</sup> and other websites that provide [RSS feeds](#) <sup>[2]</sup>. The results may be displayed in an aggregator website like [Bloglines](#) <sup>[140]</sup> or [Google Reader](#) <sup>[140]</sup>, or directly on your desktop using software often called a newsreader. Aggregation is increasingly important as content becomes more distributed around the web. (For more on how aggregation can help you harness the free functionality of other websites for your own, see [building the technology](#) <sup>[142]</sup>.)

**Alerts** some [search engines](#) allow you to specify words, phrases or tags to be checked periodically, with results of those searches delivered by email. You may also be able to read the searches by [RSS feed](#). This form of search allows you to monitor when you, your organisation, your website or a [blog](#) item has been mentioned elsewhere, and so respond if you wish.

**Avatars** are graphical images representing people. They are what you are in virtual worlds. You can build a visual character with the body, clothes, behaviours, gender and name of your choice. This may or may not be an authentic representation of yourself.

**Asynchronous** communications are independent of time or place, and messages go to and fro rather than appearing in one place at almost the same time (synchronous communication). Examples of asynchronous communication are email lists, bulletin boards and forums.

An **archive** may refer to topics from an online discussion that has been closed but saved for later reference. On blogs, archives are collections of earlier items usually organised by week or month. You may still be able to comment on archived items.

**Authority** is used on many websites and forums as a way to rank contributors, based on many different factors, often including length of participation on the site, number of contributions, and peer review. Authority is also used to rank websites and blogs against each other, for example, as a way to provide search results.

**Back channel** communications are private emails or other messages sent by the facilitator or between individuals during public conferencing. The backchannel can be a public, advertised space for conversation, or an organic channel that emerges online. They can have a significant effect on the way that public conversations go.

**Back-end**(as opposed to [front-end](#)) means the code that runs behind the scenes on a website or piece of software. Back-end developers write the database queries and complex coding functions which do the hard work behind the scenes. They work more closely with sysadmins and other more technical people, although their work is still closely tied to the business objectives and [front-end](#) designs of the [user experience](#).

**Blogs** (short for 'web logs') are websites with dated items of content appearing in reverse chronological order, usually self-published by individuals. Entries – sometimes called posts - may have keyword tags associated with them, are usually available as [feeds](#), and often allow [commenting](#). Traditional websites have pages as their main building blocks, with an address link ([URL](#)) for each page, and menus to provide navigation between them. Blogs are websites where the items of content - for example text, photos, video, audio - have URLs plus other ways of identifying them by keywords - known as [tags](#). This means you can search for individual items on the internet, and also pull items out of their sites and remix them through feeds and aggregation. Blogs are generally designed in journal format, with most recent items at the top of a page, and written in a conversational, personal style, giving the author an authentic voice online. Blogs can offer readers the opportunity to comment on, and link to items. Blog posts usually have both tags and categories to help identify the topics and ideas attributed to the content. There are many popular, free blogging platforms to choose from; the most used of those being [Blogger](#) [7], [Typepad](#) [7] and [Wordpress](#) [7]. (See also our how-tos on [getting online quickly with Wordpress](#), and [creating a blog strategy](#))

**Blogmemes** are concepts created by bloggers, campaigners or advertisers that encourage bloggers to write a post to a particular format, such as "list five secrets about yourself", and then invite other bloggers to do the same. Sometimes these are created for the amusement of bloggers themselves, but they can also be a powerful way to encourage bloggers to write about your project or ideas. They can also be a good way to annoy important bloggers though, and they should be used with caution. (Here's an example of one that worked: the 2008 [Mindapples blog campaign](#).)

A **blogroll** is a list of links displayed in the sidebar of blog, showing the sites and blogs the author/s reads regularly. It can be a good way to namecheck and endorse other writers who you respect and want to work with in the future.

**Bookmarking** is saving the address of a website or item of content, either in your browser, or on a [social bookmarking](#) site like [delicious.com](#). Using social bookmarking, the user can add tags (one or more), allowing others to easily use the research too. One website, blog, or anything else online can be tagged by any number of users, all with the same or different tags. Groups can also identify tags they want to use and make collaborative research easier. (See also [how to use Delicious.com](#))

A **browser** is the tool used to view websites, and access all the content available onscreen or by downloading. Browsers may also have features including the ability to read feeds, write blog items, view and upload photos to photo sharing sites. Browsers have become the central tool for using social media as more and more tools previously used on our desktops are becoming free online. The most commonly used browsers are Firefox (Open source from Mozilla), Internet Explorer (from Microsoft) and Safari (from Apple).

**Bulletin boards** were the early vehicles for online collaboration, where users connected with a central computer to post and read email-like messages. They were the electronic equivalent of public notice boards. The term is still used for forums.

**Categories** are ways of organising content into sections or topics for browsing or searching. Typically categories form the basis of a [taxonomy](#), whilst unstructured keywords attached to content as tags are used to form a [folksonomy](#).

**Chat** is interaction online, either within a web site or with a tool outside of your browser, that allows for a number of people adding text items one after the other into the same space at (almost) the same time. A place for chat – chat room – differs from a forum because conversations happen in “real time”, rather as they do face to face.

**Clickthroughs** are counted every time a user clicks on a banner advertisement (or other elements of a webpage) and visits the link it is promoting. Effective banner advertisements usually aim at a good ratio of clickthroughs to [page impressions](#).

**Comments** Blogs and other kinds of [websites](#) can allow readers to add comments under items, meaning users can contribute [user-generated content](#) to the site but the site author(s) can control the topics of discussion. A site may also provide a [feed](#) for comments, as well as for main items, so readers can keep up with conversations without having to revisit the site. Most blogs and websites allow for many different permission settings letting authors/administrators control what kind of comments can be made, and by whom. (For more on managing user comments, see

**Conferencing** can be any kind of multi-user discussion, face-to-face or online. ‘Web conferencing’ typically refers to live, [synchronous](#) conversation online, where participants are invited to a virtual meeting. The term ‘conference’ can include [asynchronous](#) conversations between a group of people though, organised around topics, threads, and a theme or subject - such as those found in a forum.

**Communities** are groups of people communicating, socialising and collaborating, through the internet, face-to-face or through other channels. They may simply have a shared common interest to talk about, like a neighbourhood group, or have come together for some purpose such as to learn from each other or find solutions (like IDeA’s [Communities of practice](#)). Communities may also emerge from conversations between people online, such as bloggers. List or forum-based communities can be difficult to join up with blog-based communities because of the different ways they operate technically. While communities do emerge organically, some [community-building](#) is necessary if there are specific goals to achieve. Online communities may use [email lists](#), [forums](#), [blogs](#), [social networking groups](#) or other services where content is centralised.

**Connections** As high-speed, always-on, broadband connections become more widely available, it is easy to forget that the speed and nature of internet connection available to people on a network will determine what tools they can use. If people are still using slow telephone dialup they may have problems with video and voice over IP. If they don’t have an always-on connection, Web-based tools will be less appealing because work on them can only be done when connected.

**Content** is used here to describe text, pictures, video and any other meaningful material that is on the internet.

**Content management systems** (CMS) are sometimes described as the Swiss Army knives of web technology. They are software suites offering the ability to create static [web pages](#), document stores, [blog](#), [wikis](#), and other tools. CMSs have the advantage of offering comprehensive solutions - but can be challenging to configure, and each of the different tools may not be quite as good as a

stand-alone version. Unless you have some technical skills, they are best suited for situations where you can employ a web developer to work with you, and provide some continuing support.

**CRM** stands for 'Customer Relationship Management' and is an old but still widely-used term for keeping track of contact data and the messages you send to people. Often large companies build complex tracking systems linked into invoicing, sales or membership systems, but there are a number of cheap basic systems on the market now too. [Social networks](#) and network analysis tools are challenging and augmenting the traditional 'pipeline' CRM tools.

**CSS** style sheets specify the visual appearance of elements in a webpage, such as "titles are orange 16pt Arial". Each style defined in the sheet works everywhere across the site to preserve consistency, hence the term "Cascading Style Sheets".

**Cyberspace** has been widely used as a general term for the internet or [World Wide Web](#). More recently blogosphere has emerged as a term for interconnected blogs.

**Default**, in computing, refers to the settings on any device that come "out of the box". It may be used loosely to suggest "lowest common" ... so when trying to set up ways of collaborating online you may hear reference to email-with-attachments as the default. The challenge in social networking is that you may need to move from default mode to something customised to your requirements.

**DTP** stands for desktop publishing, and refers to software for, and the process of, laying out text and images for print.

To **download** is to retrieve a file or other content from an internet site to your computer or other device. See also [upload](#).

**Domain name** is the [URL](#) address of the website, like Google.com

**E-mail** or 'electronic mail' is messages transmitted over the internet. These may be simply text, or accompanied by attachments like documents, images or other content.

**E-mail lists**, or e-mail groups, are important networking tools offering the facility to "starburst" a message from a central post box to any number of subscribers, and for them to respond. Lists usually offer a facility for reading and replying through a web page - so they can also operate like forums. This web page may offer an RSS feed - so joining up old and new tools. However, there is something of a divide between blog-based conversations and those on lists and forums because the former are dispersed across a network, and the latter don't usually allow tagging or such easy linking.

**E-marketing** is just marketing using electronic tools, most commonly [e-mail](#), [mobile](#) and the [web](#)

**Embedding** is a way to display content that is [hosted](#) elsewhere on the web (like videos on [YouTube](#) or pictures on [Flickr](#)), on your website or blog without hosting the files yourself. Most websites that host such content provide the "embed code" for users to copy and paste onto their own sites.

**Feeds** are the means by which you can read, view or listen to items from blogs and other feed-enabled sites without visiting the site, by subscribing and using an [aggregator](#) or [feed reader](#). Feeds contain the content of an item and any associated [tags](#) without the design or structure of a web

page. They can also be read by other websites, allowing the content of a feed to be [embedded](#) in different forms on a range of websites and [platforms](#) such as mobile sites.

A **feed reader** is a web-based or desktop tool that acts as an [aggregator](#), gathering content from blogs and similar sites using RSS feeds so you can read the content in one place, instead of having to visit different sites.

**Flaming** is a destructive behaviour on chatrooms and forums where users insult each other and post deliberately offensive content. Some online communities are more tolerant of this behaviour than others, but most moderators will remove offensive posts. Flaming can be done by people with genuinely strong feelings about a subject, but [trolls](#) do it to deliberately 'inflamm' other users for their own enjoyment. (If you're worried, take a look at our tips on [Dealing with inappropriate content](#).)

**Folksonomy** Rather than classifying information top-down in a [taxonomy](#), you can instead allow the users of your site (the 'folk') to add their own keywords and create a 'folksonomy' - a collection of unstructured [tags](#) which define the subject matter of the content. It means that the users define the way the content is organised, and although it is harder to create hierarchies and logical structures, folksonomies have the advantage of using language and relationships which are maintained by and make sense to the users.

**Followers** (see also [pub-sub](#)) are the individuals who subscribe to your [RSS feed](#), have connected with you on a networking space (like [Facebook](#), [Twitter](#), or [Flickr](#) – anywhere that allows you to "friend" other users), or have joined a network based on your blog, website, or group.

**Forums** are discussion areas on websites, where people can post messages or comment on existing messages asynchronously – that is, independently of time or place. Chat is the synchronous equivalent. Before blogs developed, email lists and forums were the main means of conversing online. Forum discussions happen in one place, and so can be managed and facilitated in ways that blog conversations can't because these are happening in many different places controlled by their authors. (There are some useful free forum tools listed in the [Companion](#).)

**Friends** are contacts, usually on [social networking](#) sites, whose profiles you link to your profile and with whom you share information. On some sites like [Facebook](#) people have to accept the link to confirm the friendship; in others, not. More recently, some sites like [Twitter](#) have moved to a more flexible model of [followers](#) instead.

**Front-end** (as opposed to [back-end](#)) means the user interface on a website or other software tool. Front-end developers build the bits that the users can see, and make them quick, pleasant and easy to use. They work closely with designers and copywriters, and also make sure the code will work in all the different [browsers](#) and software platforms.

**Groups** are opt-in collections of individuals with some sense of unity around their activities, objectives, interests or values. They are bounded: you are in a group, or not. They differ in this from networks or communities, which are dispersed, and defined by looser connections. E-mail lists and forums sit easily with bounded groups, blogs with networks - although the match with tools is not entirely clear-cut. A group may use a blog, and an email list may serve a network.

**Hashtags** are used in [Twitter](#) to add a subject keyword to a post, such as [#obama](#) or [#kebab](#)

**Hits** are sometimes used in [web analytics](#) to measure the number of calls on your server. Loading one page can make many calls - one for each image you have included, and so on - so these numbers are not representative of the number of individual visitors to your website. They are useful for watching the load on your [servers](#) though.

**Hosting** see [web hosting](#).

**HTML** is the language that all [webpages](#) are written in. It's a simple code for describing formatting and layout elements on a page, such as bold text, tables and images.

**HTTP** stands for HyperText Transfer Protocol, and refers to the system computers use to send webpages to each other.

**Hyperlinks** are the highlighted text or images that, when clicked, jump you from one web page or item of content to another. Bloggers use links a lot when writing, to reference their own or other content. Linking is another aspect of sharing, by which you offer content that may be linked, and acknowledge the value of other's people's contributions by linking to them.

**Inbound links** are the [hyperlinks](#) on other people's sites to your site. For [search engines](#), the quality and quantity of the sites that link to you are important for building your site's [authority](#); the text that is linked, and [anchor text](#) they use, increase your site's [relevance](#) for those [search terms](#).

**Instant messaging** (IM) is chat with one other person using an IM tool like AOL Instant Messenger, Microsoft Live Messenger or Yahoo Messenger. The tools allow you to indicate whether or not you are available for a chat, and if so can be a good alternative to emails for a rapid exchange. Problems arise when people in a group are using different IM tools that don't connect. One way around this is to use a common [Voice over IP](#) tool like [Skype](#) that also provides IM.

An **intranet** is a website or network that shares an organisation's information systems with its employees. Sometimes the term refers only to the organisation's internal website, but can also be a more extensive part of the organization's computer infrastructure. The focus and purpose is usually on making processes more efficient by sharing information more effectively.

**Javascript** is a programming language that works in your [browser](#) to produce special effects on webpages, such as pop-up windows, animations and expanding menus.

**Listserv** was the first tool for managing lists of [e-mail](#) addresses for running mass mailings and [e-marketing](#) campaigns.

**Load** see [servers](#).

**Logging in** is the process to gaining access to a website that restricts access to content, and requires registration. This usually involves typing in a username and password. The username may be your "real" name, or a combination of letters and/or numbers chosen for the purpose.

**Lurkers** are people who read but don't contribute or add comments to forums. The one per cent rule-of-thumb suggests about one per cent of people contribute new content to an online community, another nine percent comment, and the rest lurk. However, this may not be a passive role because



content read on forums may spark interaction elsewhere. Read more here about [managing online communities](#).

**Mashups** are the combination of two or more web applications to create an integrated application for specific repurposing; for example, combining Google Maps technology with an SMS service to automatically map the location of users.

**Microblogging** is a variant of [blogging](#), in which users write in very short posts such as the length of an SMS.

**MP3** (short for “MPEG-1 Audio Layer 3”) is a compressed digital format for storing music, which reduced filesizes enough for them to be easily moved from computer to computer and stored in mobile devices – usually without significantly reducing playback quality.

**Multivariate testing** is a more complex form of [A-B testing](#) in which many versions of certain key webpages are delivered to different visitors, and their behaviours monitored to see which page is most effective at leading them to the right goals. It is an expensive process and usually used for large-scale commercial sites.

**Newsreader** see [feed reader](#).

**Newsletters** Printed newsletters are one of the most popular ways of keeping network members up to date with developments, and these days e-newsletters are popular and well-established. Since all written material is likely to have been produced on a computer, it is fairly easy to offer it by email as well. That way people can easily re-use material. If it is genuinely a network newsletter, there should be scope for members to contribute.

**Online** means being connected to the internet, and also being there in the sense of reading or producing content.

**Online marketing** refers to any web-based activity to promote something.

**Offline** means not online, that is, not connected to the internet. It may refer to an unconnected computer, or activities taking place without the benefit (or perhaps distraction) of a connection.

**Open source software** is any computer software whose source code is open for users to study, change, and improve the software, and to redistribute it in some form. It is often developed in a public, collaborative manner” and the main advantage is that it lets developers use each other’s work to make quick progress building software and websites. (Read more about the various technology options out there in [Building the technology](#).)

**Page impressions** are counted each time an advertisement loads on a user’s screen. Any time you see a banner, that is an impression. The ratio of [clickthroughs](#) to page impressions is a good measure of a banner advertisement’s effectiveness.

**Pay per click (PPC)** advertising is any service which allows you to pay money to a search engine or a commercial website to place advertising with them in return for a fee for each time the advert is clicked. This pricing structure ensures you only pay for real traffic to your site, rather than paying for

page impressions.

**PDF** stands for Portable Document Format and is a type of file format created by Adobe for sending print documents electronically. They preserve layout exactly so they work well for brochures, but they aren't as navigable as HTML pages and can sometimes take a long time to download.

**Peer-to-peer** refers to direct interaction between two people in a network that bypasses the central organiser. In that network, each peer will be connected to other peers, creating huge opportunities for sharing, learning and collaborating.

**Permalink** is the address (URL) of an item of content, for example a blog post, rather than the address of a web page with lots of different items. You will often find it at the end of a blog post.

**Photo sharing** is uploading your images to a website like Flickr. You can add tags and offer people the opportunity to comment or even re-use your photos if you add an appropriate copyright license.

A **platform** is the framework or system within which tools work. That platform may be as broad as mobile telephony, or as narrow as a piece of software that has different modules like blogs, forums, and wikis in a suite of tools. As more and more tools operate "out there" on the web, rather than on your desktop, people refer to "the internet as the platform". That has advantages, but presents challenges in learning lots of different tools, and getting them to join up.

A **podcast** is audio or video content that can be downloaded automatically through a subscription to a website so you can view or listen offline. The name refers to Apple's iPod system, and their iTunes store is still the main source of podcasts.

A **post** is an item on a blog or forum.

**Presence** online has (at least) two aspects. One is whether you show up when someone does a search on your name. If not, no good pretending to be an online guru. The second is whether you use tools that show you are available for contact by instant messaging, voice over IP, or other synchronous methods of communication.

**Profiles** are the information that you provide about yourself when signing up for a social networking site. As well as a picture and basic information, this may include your personal and business interests, a "blurb" about yourself, and tags to help people search for like-minded people.

**Proprietary** software, unlike open source software, is owned by someone - whether Microsoft or an individual developer. Some proprietary software may be free, and some open-source software may be sold. The issue is the terms under which the underlying code is available.

**Pub-sub** is a model for content sharing, where users can 'publish' content via the internet or other channels, and other users can 'subscribe' to their content and have it delivered to them (or just a notification) via their own choice of technology, such as a feed reader or SMS message.

**Ranking** (search engine ranking) is the position of your site in the search engine results for a particular search term. Each search engine has its own algorithm to determine where your site will rank. This usually involves looking at the relevance of the page to the term and the authority of the site itself.



(Here are some tips on [using blogging to improve your search engine ranking](#).)

**Registration** is the process of providing a username, password and other details when seeking to access a website that has restricted access (see [logging in](#)).

**Relevance** is a search engine concept that means the relevance of the content on your site, or a page on your site, to the [search terms](#) a user has entered into a [search engine](#). The three primary factors for determining relevance are whether other sites use those terms to link to your site, the prominence of the term on your pages (whether it's in the [title tags](#), [header tags](#) etc.) and the number of times the terms appear on the page on your site (within reason!).

**Remixing Social media** offers the possibility of taking different items of content, identified by tags and published through feeds, and combining them in different ways. You can do this with other people's content if they add an appropriate copyright license. See also [Mashups](#).

**Rich media** usually means anything on a [webpage](#) except text and images, such as [videos](#) and [Flash](#) animations.

**RSS feeds** A feed is any stream of content designed to be read and republished by another website or a feed reader. This allows users and other websites to subscribe to content on blogs and other websites and have it delivered to them through a feed. RSS is short for Really Simple Syndication, and is the most common form of [feed](#).

**Search engines** allow users to locate specific information on the internet by typing in [search terms](#). Google is the best known and searches nearly all website content, including news, images and other content types. There are also specialist search engines concentrating on specific sites or topics. For example, [Technorati](#) concentrates on [blogs](#), and as well as search terms you can also search the [tags](#) people have used to describe their content. In addition to public search engines, individual sites usually have their own search engines to let users search site content.

**Search Engine Marketing** (SEM) is the collection of practices designed to increase traffic to your site from people searching online. It includes [search engine optimisation](#), [pay-per-click](#) advertising, and other techniques for making your site and content more visible to internet users. (See also [Top ten tips for SEM](#)).

**Search Engine Optimisation** (SEO) is the process of refining the content and technology of your website to increase its visibility and [ranking](#) in search engines. This primarily involves looking at a website's on-page optimisation, its [inbound link](#) profile and its [accessibility](#) to users and [search engines](#). (See also [Top ten tips for SEO](#).)

**Search term** Any word or combination of words typed by a user into a [search engine](#) – whether on your site or on a public search engine like Google.

**Servers** are special computers which [host](#) websites and web-based tools. They are just like ordinary computers, except that they are designed to talk directly to other computers rather than people. Servers need to be configured well to ensure your tools run smoothly (a task best done by a [sysadmin](#) or server expert) and if the **server load** gets too much - for example, if too many people try to use a website at once - it will crash and the website will become unavailable.

**Sharing** is offering other people the use of your text, images, video, bookmarks or other content by adding tags, and applying copyright licenses that encourage use of content. Sharing good content can be a great way to [grow your community](#).

**SMS messaging** (which actually stands for 'Short Messaging Service') is the mobile phone technology for sending (usually) 140 or 160 character messages from one mobile device to another – or more recently, to other applications like TV voting systems and [Twitter](#).

**Social bookmarking**, such as [Delicious](#), allows users to store bookmarks online, either publicly or privately, for others to reference, find or follow. This kind of bookmarking, unlike saving bookmarks to your "favourites" folder or other browser-based folders, lets you access your bookmarks from any computer, any time. Social bookmarking relies on users tagging entries freely; allowing the tags to be searchable by other users.

**Social media** is a term for the tools and platforms people use to publish, converse and share content online. The tools include blogs, wikis, podcasts, and sites to share photos and bookmarks.

**Social networking** sites, like [Facebook](#), are online places where users can create a profile for themselves and socialise with others using a range of social media tools including blogs, video, images, tagging, lists of friends, forums and messaging. You can set up your own social network on Ning right now, using [Nathalie McDermott's handy guide](#).

A **startpage** - like [Pageflakes](#), [Netvibes](#) or [iGoogle Homepage](#) - is web page that you can configure to pull in content from a range of web-based services including email, feeds from blogs and news services. It is a multi-purpose aggregator. Home pages used to be static affairs providing a sort of shop window for a site. They can now be your ever-changing window into the Net, and a way of organising a lot of different activities.

**Streaming** is a way of accessing audio or visual data that is hosted elsewhere on the web without downloading the file and opening it on your own computer.

**Subscribing** is the process of adding an [RSS feed](#) to your aggregator or newsreader . It's the online equivalent of signing up for a magazine, but usually free. It's a good way to start [listening to the conversations](#) out there.

**Surveys and polls** If members of a network have online access, it is really easy these days to use tools like [surveymonkey.com](#) to gather information from members and run polls.

**Synchronous** communications are those occurring in real time, like chat, audio or video. Face-to-face communication is synchronous too, as is telephony. The internet extends the scope for synchronous and [asynchronous](#) communication.

**Sysadmin** refers to the work of configuring, optimising and running servers and other technical infrastructure, and also to the people who do this work. Most projects outsource their [server](#) setup, meaning the sysadmin will be employed by the [hosting](#) company.

**Tags** are keywords attached to a blog post, bookmark, photo or other item of content so you and others can find them easily through searches and aggregation. Tags can usually be freely chosen - and so

form part of a folksonomy - while categories are predetermined and are part of a taxonomy. (See also [How to choose tags for your organisation](#))

**Taxonomy** is an organised way of classifying content into categories and subjects, like a library classification system. By providing contributors to a site with a set of categories under which they can add content allows you to control how content is browsed and organised. It is the opposite, or sometimes used in conjunction with, [folksonomy](#). For example, [School of Everything](#) classifies teachers using a top-down system of [categories](#), and also a user-defined map of subjects.

**Teleconferencing** is holding a meeting without being in the same place, using a network connection and tools like [Voice over IP](#), [Instant Messaging](#), [video](#), and [whiteboards](#).

**Terms of services** are the basis on which you agree to use a forum or other web-based place for creating or sharing content. Check before agreeing what rights the site owners may claim over your content.

**Threads** are strands of conversation. On an email list or web forum they will be defined by messages that use the use the same subject. On blogs they are less clearly defined, but emerge through comments and trackbacks.

**Title tags** Every web page has a title embedded in the code, which appears in the title bar of your web [browser](#) and when you [bookmark](#) a page. These title tags are also often used by [search engines](#) to index your content and create your [search listing](#).

**Tool** is used here as shorthand for a software applications, not just on your computer but also ones that are web-based.

A **topic** in an online discussion is an idea, issue - talking point - in a conversation that is made up of [threads](#). It can also mean an area of a forum containing many threads around the same theme. Distracting posts that discuss the wrong subjects in a thread or forum area are usually accused of being "off-topic" and are sometimes moved or even deleted.

**Trackback** some blogs provide a facility for other bloggers to leave a calling card automatically, instead of commenting. Blogger A may write on blog A about an item on blogger B's site, and through the trackback facility leave a link on B's site back to A. The collection of comments and trackbacks on a site facilitates conversations.

**Troll** A hurtful but possibly valuable user who, for whatever reason, is obsessed by, constantly annoyed with and deeply offended by everything you write on your blog. You may be able to stop them commenting on your blog, but you can't ban them from commenting on other sites and pointing back to your blog, and you can't ban them from posting things on their own blog that point back to your site. (See also [flaming](#).)

**Tweet** is the name for a post on Twitter. Each tweet is 140 characters or less (so it can be sent in a text message), and can refer to other Twitter users and contain links to web content. If you say something particularly interesting, other Twitter users can also 're-tweet' (RT) your posts and so circulate them to their [followers](#) as well.

**User experience** is shorthand for the many different experiences that users will have from your website or tools. Ensuring a smooth, pleasing experience for your users, particularly those who you are really aiming the service at, is crucial to getting them to use it regularly and tell others about it – which is why people spend so much time on [user testing](#).

**User-generated content** refers to any text, photos and other material produced by people who don't own or control the space and previously just consumed [content](#). Typically it refers to users of a website posting content directly to a web platform, but can also refer to any public content created by participants of a project, such as [videos](#) or [SMS messages](#).

**Username** Many sites ask you to choose a unique name for yourself on their site. The username you choose will sometimes be invisible to other users, or more commonly will be the name attached to your profile page, comments you make and other places you interact on the site.

**User testing** is any process for watching users engaging with your platform and finding out what they think of it. This enables you to find out what their experience is and what you could improve in the service you're offering. For more on this, check out our guide to [running user testing on your own website](#),

**Upload** To upload is to transfer a file or other content from your computer to an internet site.

**URL** stands for Unique Resource Locator, and is the technical term for a web address, like <http://www.socialbysocial.com>.

**Video** Many digital cameras and mobile phones take videos good enough to view on the internet. Sites like [YouTube](#) and [blip.tv](#) now make it easy to open an account, upload and share your videos. These sites will also provide some unique code for each video so you can, if you wish, embed the video in a blog post. Short interviews that “capture the moment” work well, particularly if you provide a text summary so people can easily decide whether or not to view. However, check whether the audience you are aiming at is likely to have a fast enough connection, and up to date browser, to view your video easily. (Get started now with our [quick guide to making YouTube videos](#)).

**Video blogs** (or ‘vlogs’) are dated streams of content just like a regular [blog](#), but instead of posting text-based updates the author posts videos. Many people use [YouTube](#) and other video-sharing sites in this way.

**Visits** and **visitors** are two measures of website traffic. A visit is when a user has come to your site and browsed one or more pages; a visitor might come back for multiple visits and their identity is typically tracked with a [cookie](#) to give site administrators a clearer idea of how many people are using their service.

**Viral marketing** is a marketing technique where advertisers encourage ordinary people to talk about their products, either by creating a product that people want to talk about, or by creating content that people will want to forward to each other via e-mail or [social networks](#) – such as viral videos, [Facebook](#) applications, online quizzes or [blogmemes](#).

**Virtual worlds** are online places like [Second Life](#), where you can create a representation of yourself (an avatar) and socialise with other residents. Basic activity is free, but you can buy currency (using

real money) in order to purchase land and trade with other residents. Second Life is being used by some voluntary organisations to run discussions, virtual events and fundraising.

**Voice over Internet Protocol (VOIP)** enables you to use a computer or other internet device for phone calls without additional charge, including conference calls. By using headphones and a microphone you can also free your hands to use instant messaging to keep a shared note of conversations, or use other virtual presence tools. You can use Voice over IP to do interviews for Podcasts. The best-known VOIP tool is [Skype](#).

The **web** is actually short for “world wide web” or “www”, the public network of computers and [webpages](#) that we have now come to know as the internet.

**Web 2.0** is a term coined by O'Reilly Media in 2004 to describe blogs, wikis, social networking sites and other internet-based services that promote community, collaboration and content-sharing, as distinct from the older content publishing and e-commerce websites (Web 1.0).

**Web analytics** or **web stats** include all the many ways of tracking and analysing user behaviours on a website. It includes numbers of [visitors](#), [server loads](#) and amount of data [downloaded](#), but also more complex information like the most common paths people take through the site, or the [search terms](#) people use to reach and navigate the site. We stats are a key part of watching [your growing community](#), and also [proving the impact of your project](#).

**Web-based tools** Google, Yahoo and a host of other commercial organisations provide an increasing range of free or low-cost tools including email, calendars, word processing, and spreadsheets that can be used on the web rather than your desktop. Provided you are happy to entrust your data to these organisations - and are always online when working - you can reduce your software costs significantly and forget about upgrades. (Check out our list of top ten tools for [setting up a virtual office](#) too).

**Web browser** see [Browser](#).

**Web conferencing** see [Conferencing](#).

**Webcasting** relies on streaming data to viewers who either watch/listen live or access an archived recording. These are often educational or have some element of training. Often these sessions are also called ‘webinars’.

**Websites** and webpages are the building block of the internet, constructed from [HTML](#) to present text, images and [rich media](#) within a [browser](#).

**Widgets** are stand-alone applications you can embed in other applications, like a website or a desktop, or view on its own on a PDA. These may help you to do things like subscribe to a feed, do a specialist search, or even make a donation.

**Whiteboards** online are the equivalent of glossy surfaces where you can write with an appropriate marker pen and wipe off later. They are tools that enable you to write or sketch on a web page, and as such are useful in collaboration online.

A **wiki** is a web page, or set of pages, that can be edited collaboratively. The best known example is

Wikipedia, an encyclopaedia created by thousands of contributors across the world. Once people have appropriate permissions - set by the wiki owner - they can create pages and/or add to and alter existing pages. Wikis are a good way for people to write a document together, instead of emailing files to and fro. You don't have to use wikis for collaborative working - they can just be a quick and easy way of creating a web site. Although wikis are easy to use, that doesn't mean everyone in a group will commit to their use with similar enthusiasm. See commitment, readiness.

**Workshops** A mix of formal and informal workshops can provide network members with opportunities to learn from experts and each other. However, not everyone likes organised workshops - so go for fun, playfulness and sociability too. (See also [Using events to build engagement](#))

*So, come on - what have we missed? If it isn't here, you can Google it or look it up on [Wikipedia](#) - and then let us know!*

## Key Concepts

Technical jargon isn't the only thing you need to get your head around: there's a whole new world of concepts and approaches which are important to understand as you engage with this new world. You should also take a look at what we think are the most important concepts to remember in your travels, in the Social by Social Propositions <sup>[143]</sup>.

**Adoption** is the process by which individuals and groups discover how technology may bring them benefits, learn how to use it, and then make it part of their normal work practices. The speed at which people do this may depend on their individual preparedness to experiment, their confidence and skills - and also on support available. A compelling reason is usually important for most people: 'why bother' is a reasonable question, if frustrating for technology enthusiasts. (Understanding the difficulty and unpredictability of securing adoption is a key reason not to jump for <sup>[7]</sup>the tool <sup>[7]</sup>).

**Advocacy** is one of the areas where new technologies can help individuals or groups gain more influence. Marginalised groups can use these tools to find a voice, or in the case of the users of Sawvy Chawvy <sup>[7]</sup>, to form their own communities.

**Authenticity** is the sense that something or someone is 'real'. Blogs enable people to publish content, and engage in conversations, that show their interests and values, and so help them develop an authentic voice online.

**Blending** is the process of mixing of online and offline activity, for example around an event. There may be networking and blogging online beforehand; photos, videos and reports captured on the day; discussion afterwards online around these items; informal meetups made possible by the online networking.

**Champions** In order to get conversations started in an online community, you need a group of enthusiasts willing and confident to get things moving by posting messages, responding, and helping others.

**Collaboration** is one of the higher goals of social technologies - being able to discuss and work with people across boundaries of organisation, time and space. The tools to achieve this extend from



e-mail through to web-based workspaces, file storage, calendars and other tools. With the right equipment and connections you can talk to and see each other, text, sketch and transfer files almost instantly. You can set up a workspace in a [virtual world](#) [2], and collaborate with other [avatars](#) [2]. However, the conditions for successful collaboration are more human and cultural than technical, with the bottom line being trust. Social activities like [commenting](#) [2], [social bookmarking](#) [2], [chatting](#) [2] and [blogging](#) [2] help develop the trust necessary for collaboration. The conversational and authentic tone of social media helps create conditions for collaboration by helping people explore who they would feel comfortable working with.

**Collective intelligence** has been [defined by George Pór](#) as the capacity of a human community to evolve toward higher order complexity thought, problem-solving and integration through collaboration and innovation. For a network to develop this 'mind of its own' there needs to be a willingness among members to share and collaborate. Collective intelligence is not the same as the [Wisdom of Crowds](#), where individual preferences and decisions may aggregate to produce better results without people consciously collaborating. The latter is more market-oriented, the former more cooperative.

**Commitment** the 'social' aspect of social media means that tools are most useful when other people commit to using them too. Commitment will depend on people's degree of interest in a subject, capability online, preparedness to share with others, degree of comfort in a new place, as well as the usability of the site or tool. If people are passionate about a subject and desperate to share and research, they will usually clamber over technical problems. But making things technically easier - while desirable - won't usually gain people's commitment on its own.

**Commons** Ownership is important when working to empower communities and individuals, and web 2.0 folks in particular get touchy about who owns the content created by users. The idea of the commons, which actually comes from pre-capitalist land ownership traditions, refers to spaces which are held in trust for the people and are owned by everyone. The term has become particularly popular due to its use in the [Creative Commons](#) [2] license.

**Community building** is the process of recruiting potential community or network participants, helping them to find shared interests and goals, use the technology, and develop useful conversations. A number of different roles may be involved.

**Control** social networking is difficult to control because if people can't say something in one place they can blog or comment elsewhere. That can be challenging for hierarchical organisations used to centrally-managed websites.

**Conversation** through blogging, commenting or contributing to forums is the currency of social networking. A popular perception of bloggers and social media contributors is of people ranting on a virtual soapbox or talking about their curtains, with no-one really listening. While that may be true for some, the real rewards of social media come from exchanges with others. Create your own content, but also leave comments for others. Sometimes other people will pick up your items, add a link and a little interpretation, publish on their site, and put a link or [trackback](#) [2] to you. You can also set up searches to alert you when someone mentions your name or company online. That way you know you have someone with whom to start a conversation. Read more on the importance of conversation in the [Introduction](#) [7].

**Copyright** Traditional copyright licensing and laws are difficult to apply to online media, with issues

such as physical/geographical boundaries (what is legal in one state or country vs. another) and intellectual property rights. Creative Commons is the most prominent alternative licensing that covers online content, and is very popular as it allows sharing and remixing of content for wider dissemination online. Sharing through social technology is enhanced and enabled by placing materials into the commons where they can be reused by others.

**Crowdsourcing** refers to harnessing the skills and enthusiasm of those outside an organisation who are prepared to volunteer their time contributing content and solving problems.

**Creative Commons** In the spirit of openness and sharing generally prevalent among social networkers, you will often find content labelled with this copyright license that allows you to re-use the material provided you provide an attribution. The Creative Commons site offers different licenses. One frequently used is Attribution-ShareAlike, whereby content may be altered and re-used with attribution, provided that a similar license is then attached by the new author. This may not appeal to people or organisations who like substantial control, but this is usually a cultural or commercial issue rather than a technical one. This work is released under the Creative Commons Attribution Share-Alike 2.5 License.

**Digital divide** refers to the gap between those using digital technology and those who aren't, whether for economic, geographic, lifestyle or other reasons. [UK Online](#) and other organisations are working to understand and bridge this divide and help all those who want to be online get access.

**Empowerment** in the context of this handbook refers to the encouragement of individuals and groups outside of an organization to adopt any tools or approaches necessary to interact and communicate with the organization online.

**Events**, properly organised, super-charge the energy flows in a network by firing people's enthusiasms and sparking communications. While some people may like structure and facilitation, others may be more comfortable with informal, social opportunities to meet. Either way, it is important to give people the chance to form their own interest groups.

**Exclusion** see inclusion.

**Face-to-face** is used to describe people meeting offline. While social media may reduce the need to meet, direct contact gives far more clues, quickly, about a person than you can get online. Online interaction is likely to be richer after f2f meetings.

**Facilitation** may involve hosting events well so everyone is welcome and can participate, managing discussion face-to-face or online, brokering introductions and creating the environments in which people feel comfortable. If you want to encourage conversation and new relationships, facilitate with a light touch and encourage people to self-organise where possible.

**Hosting** Some people dive into events (whether face to face or online) and make their own introductions – but many others are not disposed to do so. Hosts help break the ice and facilitate networking. You can often spot whether a network is run by a clique (clustering together) or a good core group (hosting and involving others) by watching what happens at events.)

**Inclusion** and exclusion within networks usually refer to the relationships between individuals and



existing groups within a community, such as a closed group on a social network, or a closed cultural group in society. It also encompasses 'digital inclusion' which usually means making digital technologies more accessible to people who don't or can't use them (or bridging the digital divide).

**Innovation** as we mean it here refers to new ways of communicating, building community, providing services, or creating options for citizen engagement via technology. It has a broader meaning though, which usually refers to doing things in new ways but can also mean applying existing models to new sectors, and reviving old methods in a modern setting.

**Joining up** is a big opportunity - and challenge - in the world of social media and networking. On the one hand links, tags and feeds - together with the spirit of openness - means content in different places can be brought together (aggregated). On the other hand, the move from groups to networks, and forums to blogs, means that content is spread around and there is seldom a one-stop-shop.

**Leadership** is changing in the new context of cheap digital and social technologies. It is easier than ever to ask people what they need, so leadership may have to evolve too, to become more consultative and less representative.

**Listening** in the blogosphere is the art of skimming feeds to see what topics are bubbling up, and also setting up searches that monitor when you or your organisation is mentioned.

**Location.** The nature of location and presence is changed by the internet and new technologies, because you can be active online in many different places, including in virtual worlds. However, many websites still use geographic location to provide services to enrich the experience of local life, such as School of Everything [7] and Talk About Local.

**Mapping** networks enables you to identify the main connecting people. To do that you may need to ask people questions like who they communicate with most frequently, who they most respect in their networks and so on. It can also be achieved electronically by mapping the communications sent electronically between members, if you have access to that information. If you want to grow an online community or network from an existing 'real world' network, it will be important that the key people in the offline network overlap with the champions for online networking.

**Meetings** are important in social networking in at least two ways. First, they accelerate the process of people getting to know each other. See face-to-face [2]. Second, the open and fluid style of social media is making those using it impatient with committee-style meetings and conferences dominated by platform speakers. With a little commitment it is possible to agree some meeting topics beforehand, circulate material, capture discussion at the time, carry on discussions afterwards ... or maybe not have the meeting at all. Use Voice over IP [2], chat [2], instant messaging [2] ... or even a get-together in a virtual world.

**Membership** involves belonging to a group, but also often having a say in it. Social networks [2] and other looser structures can offer some of the benefits of group membership, without the need for as much central co-ordination. The growth of free, simple networking tools may present challenges for organisations who depend on membership for funds or to demonstrate their credibility. (Read more later about the implications of new technologies for membership organisations.)

**Mindset** means the general understanding or view of an individual, group, or population of people,

especially as it applies to technology adoption. It is the way we see the world, and the way we approach problems - and solutions.

**Narrative** see **stories**.

**Networks** are structures defined by entities (called 'nodes') and the connections between them. In social networks the nodes are people, and the connections are the relationships that they have. In computing a node might be a computer and a connection a network cable. In all cases, networking is the process by which you develop and strengthen those relationships.

**Network analysis** refers to a set of techniques (including mapping) for analysing connections between people (or organisations, websites, servers etc.) and analysing the important links, influential members and potential strengths and weaknesses.

**Openness** is being prepared to share and collaborate – something aided by social media [2]. **Open SOURCE** [2] software - developed collaboratively with few constraints on its use - is a technical example. In order to be open online you may offer share-alike copyright licenses, and you may tag content and link generously to other people's content. This demonstrates open source thinking.

**Ownership** The stake that people have in an idea, a project or an organisation is fundamental to their commitment. 'Not invented here' is a powerful block to gaining people's involvement - whether they are councillors, officers, professionals, business people or residents. For that reason early brainstorming workshops, where everyone has a chance to contribute ideas, are important.

**Participation**, or 'participatory culture', is used to describe a way of doing things in which people use social media to share and collaborate. Using social media certainly opens up more ways for people to do participate, and it allows greater openness and transparency which in turn encourages it. However, the tools do not on their own create a participatory culture, because people are unlikely to commit to using them unless they are inclined to participate in the first place.

**Personality types** Personality type can have a profound effect on people's style of networking. Extroverts gain a lot of energy from interaction with others, so are likely to be confident face to face networkers. Introverts may like time to reflect and develop their ideas internally – and may view a sea of new faces with trepidation. Different personality types may also prefer to use different communication tools (phone, email). Good network facilitators cater for a range of preferences.

**Public services** traditionally meant services provided by the Government to the people, such as the National Health Service and other parts of the 'welfare state'. But we use it here to mean any services which are delivered for the common good of the general public, either by Government or third sector bodies, or by groups of self-organising individuals.

**Readiness** is a check on whether you - or your organisation - are prepared to engage with social media. An obvious issue is whether you feel technically confident - but a further issue then is whether as an individual you are ready to 'find your voice' online, or whether as an organisation you will be comfortable with an open and non-hierarchical environment. Everyone will have different preferences on how to engage online, so it may be best to lurk, explore, and try small steps.

**Relationships** are the links that hold networks together: the links between members and the network

organiser, and the links that members have with each other. The weak links may be as important as the strong. One good test of a network is whether you feel able to contact someone you don't know too well with a suggestion or request. If relationships are strong between one group they may appear to be a clique and become excluding.

**Service design** applies product design and other design techniques to creating better services for people. Service designers model the needs of users and create processes and experiences that satisfy them practically and emotionally, such as a better healthcare process, or a well-drilled call centre.

**Social innovation** refers to new ways of collaborating or providing services for social or public good, sometimes with the aid of technology but also using new offline techniques and new ways of approaching problems. It is closely linked to both service design and social enterprise.

**Social software** refers to any tools which help people come together to socialise, collaborate or interact. It usually implies digital/computer technology, but can sometimes also mean offline tools, event technologies and systems of work and thought which help people collaborate and socialise more effectively.

**Stories** are a strong theme in and social media. Anecdotes, bits of gossip and longer narratives work particularly well on blogs if they have a personal angle. Stories help readers get to know the author - and help the author find and extend their voice. Narrative techniques can also deliver a range of benefits to an organisation, and stories are a particularly powerful tool in organisational change and knowledge management.

**Transparency** Enhancing searching, sharing, self-publish and commenting across networks makes it easier to find out what's going on in any situation where there is online activity.

**Trust** Networks are about people and their relationships, and these bonds only develop if there is growing trust. Openness and sociability help. Doing things together – activities and projects – will rapidly help people decide who they trust. Since networks are communication systems, good and bad news about people travels fast.

**Voice** Technology enables you to extend your voice by increasing your reach across the net, in the way that suits you best. You can write, or if you are a visual person you can upload photos or other images and invite comments. However you choose to communicate, the personal style and content of what you communicate is usually called your 'voice' online. Your voice can be focussed on your own blog or website, but can also be heard on other sites through your commenting, linking and use of social media tools. Having a consistent voice for all your communications helps people to identify you across all these different channels and build a relationship with you online.

The **wisdom of crowds** is a term coined by James Surowiecki in his book of the same name, to refer to the situations where tapping the knowledge and judgement of many people can produce more accurate results than asking a small group of experts. Surowiecki argues that in some situations, the many can be smarter than the few - a position traditionally at odds with perceptions of crowd behaviour and fear of 'mob rule'. Many of these ideas are being tested in practice by large-scale collaboration projects such as Wikipedia, and they underpin much of the theory of web 2.0.

# Emerging roles

It's not all about technology, it's about skills too. Events need hosting, committees need chairing, working groups need facilitation, online (and offline) networks and communities need support from people who may be called, for example, 'technology stewards', or 'network weavers'. Many of the new activities made possible by these new technologies are also tapping new skills and creating new roles, some paid, some unpaid.

**Champions** are the core group of enthusiasts you need to start a community.

**Community manager** This role incorporates monitoring, moderating, hosting, encouraging and sometimes steering the community/discussions. It is most commonly used to refer to someone managing a discussion forum or other user-generated content platform, but can also include offline activities such as running events, and directing conversations across other social media spaces.

A **facilitator** is someone who helps people in a face-to-face meeting or an online group or forum manage their conversations. They may help agree a set of rules, draw out topics for discussion, gently keep people on topic, and summarise. Wikipedia defines a facilitator as "someone who helps a group of people understand their common objectives and assists them to achieve them without taking a particular position in the discussion. The facilitator will try to assist the group in achieving a consensus on any disagreements that pre-exist or emerge in the meeting so that it has a strong basis for future action."

**Host** Some people dive into events (whether face to face or online) and make their own introductions – but many others are not disposed to do so. Hosts help break the ice and facilitate networking. You can often spot whether a network is run by a clique (clustering together) or a good core group (hosting and involving others) by watching what happens at events.

A **social reporter** helps create meaning in social spaces – online and offline – by bringing stories to the surface, and helping others do the same. These may be captured in text, audio, video, images. Mainstream reporters often focus on crisis, conflict, celebrity. Social reporters are more concerned with conversations, collaborations and celebration of what is being achieved.

A **technology steward** is someone who can facilitate community and network development. Nancy White offers the definition: "Technology stewards are people with enough experience of the workings of a community to understand its technology needs, and enough experience with technology to take leadership in addressing those needs. Stewardship typically includes selecting and configuring technology, as well as supporting its use in the practice of the community."

**Platform manager** If you have a substantial social technology system, one person within the organisation should be responsible for ensuring it is available and usable,

and any required changes are made.

A **user evangelist** (sometimes called a technology evangelist) is someone who helps people use the system, such as by sharing tips and techniques, and who also represents users' perspectives and capabilities within the project team. They know what the users are capable of, and what they want to do, because it's their job to help them do it.

An **executive sponsor** is someone in a senior position in an organisation who can strongly support the project and help the development team overcome obstacles.

Steph Gray, who works in digital engagement at the Department for Business, Innovation and Skills, also identifies the roles of **campaign strategist**, **social media developer** and **digital mentor**, and suggests that roles might change as you move from building to using your online capability.

## The companion

A handy collection of software, sites and links to more information

by **AMY SAMPLE WARD**

## Essential tools

### Finding, listening and measuring

**Google Analytics** A free web stats tool from Google that allows you to track the users of your website or blog.

**Google Alerts** A free tool from Google that allows you to set up alerts of new content on the internet for particular key words, names, websites or tags to be delivered to your email. (Find out [how to create a Google Alert](#) <sup>[144]</sup> too.)

**Google Reader** A free tool from Google that allows you to read and manage subscriptions to [blogs](#) <sup>[2]</sup> or websites via [RSS](#) <sup>[2]</sup> in your web browser. (Here's more on [How to subscribe to an RSS Feed](#) <sup>[144]</sup>.)

**iGoogle Personalised Homepage** Customise your Google homepage to display feeds from your favourite websites.

**Netvibes** A free tool that allows you to read and manage [subscriptions](#) <sup>[2]</sup> to [blogs](#) <sup>[2]</sup> or websites via [RSS](#) <sup>[2]</sup> in your web browser.

**Silverback** is a cheap user-testing package that records the test subject and their screen activity for later review.

**Twitter search** lets you search for any term, hashtag <sup>[2]</sup> or user in Twitter <sup>[7]</sup> and get alerts delivered to your desktop.

**Yahoo! Pipes** A powerful but complex free tool for creating a feed <sup>[2]</sup> based on combinations or mashups <sup>[2]</sup> of other content.

## Communication, promotion and conversation

**Blogger** A free blogging tool from Google that is hosted online by Google; the URLs <sup>[2]</sup> take the form '*blogname.blogspot.com*'

**Crowdvine** A social network building tool like Ning, aimed at conferences and professional groups.

**Facebook** A free social networking site originally designed for US college students, expanded to include high schools and then to anyone around the world aged 13 or over, it's the biggest social network but still tends to be more popular with the educated middle classes.

**FriendFeed** A free online tool for creating communities and sharing information from other social media platforms.

**Jaiku** A free online microblogging tool.

**LeFora** A free tool for creating and managing online forums.

**MyBlogLog** A free tool that allows you to create and broadcast (via an embeddable widget) a community around your blog or website.

**MySpace** A free social networking <sup>[2]</sup> site originally designed for musicians to share music and create communities of fans, broadened to include all demographics.

**Ning** A free tool for creating your own social network <sup>[7]</sup> and community online, either private or public. (SawvyChavvy <sup>[145]</sup> and TuDiabetes <sup>[66]</sup> used Ning. Here's Nathalie McDermott's guide to how to set up a social network on Ning <sup>[146]</sup>.)

**Pownce** A free online microblogging tool.

**Second Life** The most prominent virtual world <sup>[2]</sup> that is free for users to register and participate, though the in-world currency can only be purchased with real-world money.

**Skype** The most common voice over IP <sup>[2]</sup> internet telephony service lets you make chat <sup>[2]</sup>, voice and video calls free of charge.

**Twitter** A free and increasingly popular tool that allows users to send short messages

(140 characters or less) via a web browser <sup>[2]</sup>, SMS <sup>[2]</sup> or software clients such as **Tweetdeck**, **Tweetie** and **Twitzap**.

**Typepad** A free blogging <sup>[2]</sup> tool that is hosted online by Typepad.com.

**Wordpress** Another free blogging <sup>[2]</sup> tool, one of the most popular platforms for blogging with a large support community, that can be set up to be hosted online by Wordpress.com or downloaded from Wordpress.org and installed on your own server. (Here's how to use Wordpress to get your project online quickly and cheaply <sup>[147]</sup>.)

**Yammer** A subscription microblogging service for creating closed networks within companies.

## Publishing and sharing

**Blip.tv** A free online video sharing and storing platform.

**Delicious** The most widely used free tool for social bookmarking, it allows users to make bookmarks public or private. (Here's Amy's guide to How to use Delicious.com <sup>[148]</sup>)

**Digg** A social news site where users vote on stories they like and the most popular appear on the homepage.

**DoGooderTV** A free online video sharing and storing platform with a social good emphasis.

**FilesAnywhere** A free tool for sharing documents and files online, including version control and workgroups.

**Flickr** A free online photo sharing and storing platform.

**Freemind** A free open source mind-map creation tool (or pay a small fee for Mindjet's MindManager instead).

**Gliffy** Diagramming and project planning software online.

**Google Docs** Excellent for collaborative authoring of documentation and project plans.

**iPod** and **iTunes** are commercial technologies built by Apple Computers Inc. iPods are portable media players that play MP3 <sup>[2]</sup> music, videos, software applications and games. iTunes is Apple's music store, and the supporting software for the iPod.

**Last.fm** Streaming music channel that allows users to create their own library of favourite artists and songs, share recommendations and 'friend' other users.

**Magnolia** A free tool for social bookmarking (allows users to make bookmarks public or private).

**Mindmeister** Free tool for sharing and co-authoring mindmaps online.



**Openworkbench** Basic Gantt and project planning charts online.

**Qik** A free online tool for video streaming.

**Scribd** Share documents with a community of readers and get your ideas and research read by a much wider community.

**Slideshare** YouTube for presentations, a great free platform to promote your ideas and teach people what you know.

**Squarespace** A website creation tool that helps people create and host their own websites, blogs and more.

**UStream** A free web-based tool for creating your own live online video channels.

**Vimeo** A free online tool for video sharing and streaming.

**Wikidot, Wikispaces** Free wiki tools for recording ideas, meeting notes and decisions collaboratively in a shared space.

**YouTube** A free online video sharing and storing platform. (Here's a quick guide to How to make and publish quick videos for the web <sup>[149]</sup>.)

## Connection, collaboration and project management

**Basecamp** A tool for online project management and collaboration with free and paid-for versions.

**Bebo** A free social networking site aimed at helping friends share personal information and explore entertainment, popular with younger users.

**Eventbrite** and **Eventful** Free online tools for event promotion.

**Facebook Groups** An application in Facebook that allows users to create and manage groups.

**Facebook Pages** An application in Facebook that allows users to create and manage a fan page, similar to a group but users can 'become a fan' rather than having to join something more organised.

**Fundable** is a website that lets users pledge to donate money and collects the donations once a target is hit.

**Google Apps** The suite of 'office' tools from Google, including Google Docs (documents, like Word), Google Cal (calendar for individuals or groups), Google Mail (email), Google Sites and so on.

**Google for Domains** Essential e-mail, calendar and other tools for project management and organisation.

**Google Groups** A free group management and listserv <sup>[2]</sup> tool.

**Highrise** Cheap contact management and CRM <sup>[2]</sup> tools for wider engagement.



**Hiveminder** A simple-to use but powerful task management tool with support for groups and email integration.

**Huddle** A tool for online project management and collaboration with free and paid-for versions.

**LinkedIn** A free online social network with an emphasis on business or corporate/professional use.

**Meetup** An online tool for event promotion (it is free to use, but it costs money to manage a group).

**My Charity Page** A free online social networking platform targeted at fundraisers and charities.

**Pledgebank** A popular activism tool that allows anyone to pledge to do something if a number of other people do the same.

**School of Everything** A global network of teachers and learners where you can find teachers and classes near you. (Check out Andy's guide to [how to use Schoolofeverything.com](#) <sup>[146]</sup> too.)

**Social Actions** A free platform to find, create, and share opportunities for social benefit actions (donations, petitions, on or offline actions, etc).

**SugarCRM** A cheap [CRM](#) <sup>[2]</sup> system for small businesses and campaigning groups.

**Upcoming** A free online tool for event promotion.

**Windows Live Folder Sync** turns any group of un-networked, web-enabled PCs into a virtual shared drive, with all content held on all machines and available offline, for use by all collaborators. (Includes good version control).

## Resources

Information overload is a real issue. We've all typed a search term into Google before and then tried to manage our way through thousands, if not millions, of results. The problem is that if we don't know what we're looking for, it can be almost impossible to find. Here are some places to start your search and continue your learning. You can also take a look at this [Social Media in Plain English](#) <sup>[150]</sup> video by Common Craft to set the stage for the rest of the tools and ideas to follow.

Information online changes every day, so to stay up to speed with the changes in social media generally, and with the specific ways organisations and individuals are interacting online, join us online to keep the conversation going and find the most up-to-date resources.

We've broken up the resources into the key areas that you need to understand. For each of these areas, we've collected together the best web resources for public and third sector organisations, plus a selection of commercial materials too.

Use these materials to get a clear understanding of the sector, find communities and

networks to meet and chat with the experts, connect with leading consultants and organisations, read the best blogs, data sources and publications, and access tools you can use right now to get you started.

# Search and Search Engine Optimisation

Search Engine Optimisation is the process of improving the volume and quality of traffic to a web site <sup>[151]</sup> from search engines <sup>[152]</sup> via 'natural' ('organic' or 'algorithmic') search results <sup>[153]</sup>. Usually, the earlier a site is presented in the search results, or the higher it 'ranks,' the more searchers will visit that site. SEO can also target different kinds of search, including image search <sup>[154]</sup>, local search <sup>[155]</sup>, and industry-specific vertical search <sup>[156]</sup> engines. (from Wikipedia <sup>[157]</sup>).

**Definition:** Web Search Strategies in Plain English <sup>[158]</sup> by Common Craft.

**Communities:** Google's Search Engine Optimization Forum <sup>[159]</sup>

**Networks:** The SEO Network <sup>[160]</sup> (Ning); Search Engine Optimization <sup>[161]</sup> (Ning); NTEN's SEO & Google AdWords Affinity Group <sup>[162]</sup> (free).

**Consultants:** Read the series Creating an SEO Strategy <sup>[163]</sup> from CivicActions; search for consultants on SEOPros <sup>[164]</sup>

**Organisations:** Search Engine Marketing Professional Organization <sup>[165]</sup>

**Blogs:** Search Engine Roundtable <sup>[166]</sup> blog; SEO Marketing World <sup>[167]</sup> blog; Google Webmaster Central <sup>[168]</sup> blog.

**Tools:** Google Analytics <sup>[7]</sup>; 10 Free Analytics Tools <sup>[169]</sup> reviewed by ReadWriteWeb.

**Data sources:** Google's Webmaster Guidelines <sup>[170]</sup>; Yahoo! Search Content Quality Guidelines <sup>[171]</sup>

**Publications:** Get to the Top on Google <sup>[172]</sup> by David Viney; Search Engine Optimization: An Hour a Day <sup>[173]</sup> by Jennifer Grappone and Gradiva Couzin; Search Engine Optimization for Dummies <sup>[174]</sup> by Peter Kent; The Secrets of Search Engine Optimization: How to Get to the Top of Google <sup>[175]</sup> by Mike Stepney and Nick Maynard.

## 10 Search Engine Optimisation tips

By Lucy Langdon, Search Marketer at Distilled

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*Distilled are a vibrant online marketing company who specialise in online reputation management, search engine marketing and web site design. www.distilled.co.uk* <sup>[176]</sup>

1. Your website needs to be read both by visitors and by the search engines. Speak in your visitors' language, keep things simple, and you're well on your way to

making your site search engine friendly as well.

2. It's really important to check you're using the same keywords as your potential visitors. Otherwise, how else will they find you? Use tools like [SEObook's keyword suggestion tool](#) <sup>[177]</sup> to make sure you've got your finger on the pulse.
3. Title tags are very important for SEO. They appear in the bar of your browser and on the search engine results page. There are three basic rules: each page should have a unique title tag; each title tag should naturally include the keyword/s for its page; the title tag should be fewer than 65 characters.
4. Like title tags, header tags tell your visitors and the search engines what's important on each particular page. Again, three rules: put your most competitive keyword for the page in an h1 tag; only have one h1 tag per page; put your other keyword/s in h2, h3, h4 etc tags.
5. There are no golden rules about how many times to use your keywords in on page copy. If you write naturally for your visitors, the copy should naturally appeal to the search engines as well.
6. Visitors and search engines need to be able to find their way around your website. Make sure the navigation is straightforward; links should be prominent and, if possible, they should use the keyword of the page they are pointing to.
7. Search engines need to know they can trust your site and that their users will appreciate finding you. One of the ways they do this is by looking at that sites link to yours – it's a bit like a recommendation or endorsement. Think about how and where you can get some natural links from around the web.
8. Google is the main player when it comes to search engines. If the traffic it sends to your site is important to you, you should play by its rules. They are lots of ['guidelines'](#) <sup>[178]</sup>. Here are the two most important: Don't pay for links and don't cloak content (show different content to users and search engines).
9. Visitors and search engines alike have a relatively short attention span. Be concise. Try and put all your most important information close to the top of each page.
10. There is a lot to learn about SEO. [Seomoz.org](#) <sup>[179]</sup> is a great repository of accurate information and will keep you up to date on all the industry news.

## Listening, bookmarking and aggregation

Social bookmarking is a method for [internet](#) <sup>[180]</sup> users to store, organise, search, and manage [bookmarks](#) <sup>[181]</sup> of web pages on the [internet](#) <sup>[180]</sup> with the help of [metadata](#) <sup>[182]</sup>. In a social bookmarking system, users save links to [web pages](#) <sup>[183]</sup> that they want to remember and/or share. These bookmarks are usually public, and can be saved privately, shared only with specified people or groups, shared only inside certain [networks](#) <sup>[184]</sup>, or another combination of public and private domains. The allowed people can usually view these bookmarks chronologically, by category or tags, or via a search engine. (from [Wikipedia](#) <sup>[185]</sup>).

RSS is a family of [Web feed](#) <sup>[186]</sup> formats used to publish frequently updated works—such as [blog](#) <sup>[187]</sup> entries, news headlines, audio, and video—in a standardised format. An RSS document (which is

called a 'feed', 'web feed', or 'channel') includes full or summarised text, plus metadata [182] such as publishing dates and authorship. Web feeds benefit publishers by letting them syndicate content automatically. They benefit readers who want to subscribe to timely updates from favoured websites or to aggregate feeds from many sites into one place. RSS feeds can be read using software [188] called an 'RSS reader', 'feed reader', or 'aggregator' [189], which can be web-based [190] or desktop-based [191]. (from Wikipedia [192]).

**Definitions:** RSS in Plain English [193] from Common Craft; Social Bookmarking in Plain English [194] by Common Craft; Google Reader in Plain English [195] by Common Craft.

**Communities:** WeAreMedia 'Listening is the First Step' [196]; WeAreMedia on RSS Readers [197]; WeAreMedia on Social Bookmarking [198].

**Consultants:** Beth Kanter's Social Media Listening [199] wiki; Mike Kujawski's Social Media Monitoring, 10 Free Tools [200] slideshow; Jason Falls' The Art of Listening [201] slideshow; Beth Kanter's Listening Primer [202].

**Blogs:** NP Communicator's Way Beyond News Alerts [203] blog post; Neil Williams' 4 Methods and 40 Free Tools for Listening [204] blog post.

**Tools:** Google Alerts [7]; Delicious [205]; Magnolia [7]; Google Reader [7]; Netvibes [7]; Yahoo Pipes [7].

**Data sources:** List of tools [206] from Wikipedia.

**Publications:** Syndicating Web Sites with RSS Feeds for Dummies [207] by Ellen Finkelstein; The Art of Strategic Listening: Finding Market Intelligence in Blogs and Social Media [208] by Robert Berkman.

## How to subscribe to an RSS Feed

by Amy

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1. Set up your RSS reader, like Google Reader which is free and easy to use, by going to http://www.google.com/reader [209].
2. Visit the blog or site you'd like to stay up-to-date about.
3. Check for an RSS icon in the URL address bar (the icon is a square with a dot and two curved lines, like a signal), or a 'subscribe to RSS' link.
4. Click on the RSS icon or link and select 'subscribe in Google Reader'.
5. It will redirect you to Google Reader with the feed, where you can organise your subscriptions by folders, and unsubscribe if you ever want.

## How to create a Google Alert

by Amy

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Google lets you save searches and get e-mail updates on them, so you can monitor new content about a topic or keep track of the conversations about your products and services.

1. Go to <http://www.google.com/alerts> <sup>[210]</sup>.
2. Enter the terms, title, name, etc you want searched (it's a good idea to set them up for the name of your organisation, names of services you provide, projects you are working on, and so forth).
3. Choose the type of search you want (note: 'comprehensive' means all of the options, so is usually the best for full coverage, but if you only want videos, then choose that, etc.).
4. Choose how often you'd like the results sent to your email.
5. Enter your email address.
6. Hit 'Create Alert' and you're done!

## How to use Delicious.com

by Amy

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Delicious.com is a great place to keep track of useful websites you find, tag and share with others. And quickly browse the sites other people have found already. As well as signposting you to lots interesting content to read, it's a great social research tool.

1. Visit [www.delicious.com](http://www.delicious.com) <sup>[205]</sup> and create an account.
2. Check out the [about page](#) <sup>[211]</sup> to see how it all works.
3. I'd recommend installing the delicious [browser plugin](#) <sup>[2]</sup> (for faster tagging).
4. Browse the web in your normal way, at work or at home.
5. When you find a page you'd like to save or share, visit [www.delicious.com/save](http://www.delicious.com/save) <sup>[212]</sup> and enter the URL
6. Hit 'next' and you can add notes about the page, select whether it is a public or private bookmark, and add the corresponding tags .
7. If you have a tag for your organisation, make the links public and use this tag for all relevant links so that other people in your team or community can find them.

## How to choose [tags](#) <sup>[2]</sup> for your organisation

by Amy

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By choosing a unique word or phrase to represent your project, you can start to build up a distributed conversation, track discussions and create an online brand. It makes it easier for people to reference you and share their knowledge. For example, conversations about this project are tagged 'social by social'.

1. Search on delicious.com for your organisation's URL and review how others have

- tagged it (if no one has tagged your URL, try searching for those of larger or more prominent organisations in your field).
2. Ask everyone in your office to contribute the most frequently used abbreviations or common 'nick names' they use for the organisations.
  3. Compile a list of terms for projects, teams, services and your organisation as whole.
  4. Encourage staff to begin using delicious.com (see above) and watch for tags naturally used most.
  5. Promote the tags you want staff and others to use by mentioning it on your website or blog (like, "Any information you've found useful and want to share with us? Tag it online with 'YOURORG-shared' and we'll be sure to catch it!").

## Metrics and Return on Investment

Social media measurement refers to the tracking of various social media <sup>[213]</sup> content such as blogs <sup>[214]</sup>, wikis <sup>[215]</sup>, micro-blogs, social networking <sup>[216]</sup> sites, video/photo sharing websites, forums, message boards, and user-generated content <sup>[217]</sup> in general. Social Media Measurement is growing as a method used by marketer to determine the volume and sentiment around a brand or topic in social media. (from Wikipedia <sup>[218]</sup>).

**Communities:** WeAreMedia 'Considering the ROI' <sup>[219]</sup>; WeAreMedia on Monitoring <sup>[220]</sup>.

**Consultants:** Brian Halligan's Social Media ROI <sup>[221]</sup> slideshow; Jeremiah Owyang's Social Networks Site Usage <sup>[222]</sup>; Visitors, members, Page Views, and Engagement by the Numbers in 2008 <sup>[222]</sup> collection of resources.

**Organisations:** Idealware's Eight Ways a CMS Can Help with Search Engine Optimization <sup>[223]</sup> article; Idealware's 10 Steps to Being Found on Search Engines <sup>[224]</sup> article; New Economics Foundation's Social Return on Investment <sup>[225]</sup> report.

**Blogs:** Beth Dunn's The Continuing Saga of the ROI of Social Media <sup>[226]</sup> blog post; Beth Kanter's eMetrics Panel Slides, Notes, and Blog Posts: ROI of Blogging, Twitter, and Digg for Non-profits <sup>[227]</sup> blog post; Janet Fout's Social Media ROI <sup>[228]</sup> blog post; John Haydon's How to Use Google Analytics for Your Non-profit <sup>[229]</sup> post.

**Tools:** Google Analytics <sup>[230]</sup>; MyBlogLog <sup>[231]</sup>

**Publications:** eNon-profits Benchmarks Study <sup>[232]</sup> from NTEN & M+R Strategic Services; Web Usage Survey <sup>[233]</sup> from TechSoup.

## Blogging and microblogging

A blog (a contraction of the term 'Web log') is a Website <sup>[234]</sup>, usually maintained by an individual with regular entries of commentary, descriptions of events, or other material such as graphics or video. Entries are commonly displayed in reverse-chronological order. 'Blog' can also be used as a verb,

meaning to maintain or add content to a blog. Many blogs provide commentary or news on a particular subject; others function as more personal online diaries [235]. A typical blog combines text, images, and links to other blogs, Web pages [183], and other media related to its topic. The ability for readers to leave comments in an interactive format is an important part of many blogs. Most blogs are primarily textual, although some focus on art (artlog [236]), photographs (photoblog [237]), sketches (sketchblog [238]), videos (vlog [239]), music (MP3 blog [240]), audio (podcasting [241]), which are part of a wider network of social media [213]. (adapted from Wikipedia [242]).

**Definitions:** Blogs in Plain English [243] by Common Craft; Twitter in Plain English [244] by Common Craft.

**Communities:** WeAreMedia on Commenting [245]; WeAreMedia on Blogs [246].

**Networks:** Building a Better Blog [247] (Ning); NTEN's Non-profit Blogging Affinity Group [248] (free).

**Consultants:** Joshua Porter's 9 Lessons for Would-Be Bloggers [249]; Britt Bravo's Non-profit Blogging Burning Questions and Answers [250]; Beth Kanter's Twitter Primer [251]; Beth Kanter's Blogging Primer [252]; Amy Sample Ward's Quality Content Guide for Twitter [253].

**Organisations:** A Few Good Blogging Tools [254] from Idealware (requires registration); Getting Started with Blogging Software [254] from Idealware (require registration); Network for Good's 10 Reasons Why Every Non-profit Must Have a Blog [255] article.

**Blogs:** Nancy Schwartz's Should Your Non-profit Launch a Blog [256] post; Britt Bravo's 10 Ways Non-profits Can Use Blogs and Bloggers to Support Their Cause [257] post; John Haydon's Blog vs. Website - Connecting with the Tribe [258] post.

**Tools:** Wordpress [259]; Blogger [260]; Typepad [261]; Twitter [262]; Pownce [263]; Jaiku [264]; Yammer [7].

**Data sources:** View blogs from the Bloggers Choice Awards [265] for good examples; use Google Blog Search [266] or Technorati [267] to find blogs about the issues or services you focus on.

**Publications:** Blogging for Dummies [268] by Susannah Gardner and Shane Birley; The Huffington Post Complete Guide to Blogging [269] by Kenneth Lerer, The Editors of the Huffington Post, and Arianna Huffington; Blogging Heroes: Interviews with 30 of the World's Top Bloggers [270] by Michael A. Banks; Twitter for Dummies [271] by Laura Fitton; Twitter Revolution: How Social Media and Mobile Marketing Is Changing the Way We Do Business & Market Online [272] by Deborah Micek and Warren Whitlock.

## How to get your project online quickly and cheaply

by Andy

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When I first set up my consultancy firm Sociability [273] in 2007, I used a combination of 123-reg [7], Wordpress [7] and Google for Domains [7] to create a website and e-mail



addresses quickly – and all for a grand total of £20.

1. First, buy a web domain [2] for your project (eg. www.socialbysocial.com [274]) from 123-reg.co.uk. (.com or .org domains are best, and try to choose something that's short and easy to spell over the phone.) Resist their attempts to sell you hosting, e-mail addresses etc.
2. Sign up for a free blog at Wordpress.com [275], and under Appearance -> Themes [276], choose a theme that fits with the feel of your project. Write an 'About us' page, a 'Contact us' page, and maybe a 'Who we are' page too. Put a contact e-mail on the contact page so people can get in touch.
3. Here's the tricky bit: you also need point your domain at Wordpress.com's servers. Go to your 123-reg 'control panel' and find your domain. Unlock it first using 'Manage domain locking', and then choose 'Change nameservers'. You need to enter the Wordpress nameservers in the first 3 boxes: ns1.wordpress.com, ns2.wordpress.com and ns3.wordpress.com (check Wordpress.com's help section for more on how to do this.)
4. Now go back to Wordpress so you can upgrade your blog. Under Upgrades – Domains [277], enter your chosen domain and click 'Add'. (You'll be prompted to buy 10 credits.) After that, select it as 'Primary' and click 'Update Primary Domain'. This makes the blog appear as the homepage for your website.
5. Now, sign up for Google for Domains [278], which lets you create Gmail addresses for each of your team members at your own domain (and extra ones for general public enquiries, such as 'hello@yourdomain.org').
6. When it's time to 'verify domain ownership', choose the 'Upload an HTML file' option. You'll see a verification code that starts with 'google' and ends with a series of random characters.
7. Go back to Wordpress.com and under 'Upgrades -> Domains', select 'Enable Google MX' and paste the Google code into the box. Then go back to your Google control panel and click the link to complete the verification process. (It will take a couple of days to sort itself out.)
8. If you want, you can also create a Facebook group [7], a MySpace [7] page and Twitter [7] account, and put links to them on the sidebar of your site. If you tag [2] content with a keyword for your project (eg. 'social-by-social' or 'SXS') on Delicious [7], Flickr [7] and School of Everything [7], you can also embed widgets [2] and RSS feeds [2] to pull in that content to your main website, like Colalife [279] did (check out Appearance -> Widgets [280] in the Wordpress admin).

If that's too complicated, why not find a nice tech-savvy friend to do it all for you? It'll take them less than a day. And if you need more options, there are lots of other tools you can use too, like Squarespace and Blogger.

## How to use blogging to improve your search engine position

By Lucy Langdon, Search Marketer at Distilled

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Blogging is a great opportunity to interact with your visitors, but it also presents several



opportunities to improve your rankings in the search engines.

1. A blog is a great place to naturally add a lot more spiderable content to your site so post regularly on a wide range of subjects. This will help your site rank for lots of different terms – what's known as the 'longtail' of search. Recent stats actually suggest that ranking well for longtail brings in at least as much as, if not more traffic, than ranking well for headtail search (the most competitive keywords in your industry).
2. If you're writing good, regular content, you may as well make it SEO friendly while you're at it. Include the keywords of what you're writing about in the title of the post and put other important words/phrases in header tags or the strong tag.
3. There's nothing worse than an abandoned blog. If you're going to start one, make sure you have time to post regular quality content on there. This will keep your readers and the search engine spiders happy.
4. Internal linking is an important part of building a strong site. If you blog about something and it's natural to link elsewhere on your site, then go for it. Remember to use optimised anchor text if you can.
5. Blogging is a form of conversation. Don't make the mistake of thinking the job's done as soon as the post goes live. It's often in the comments of a post that you'll find some of the most interesting discussions so make sure you set aside time to interact with your readers properly.
6. Spend time thinking about the kind of content you can create that people will actually link to. Can you break any news? Or provide a useful resource or definitive guide of any kind? If you ever submit Press Releases online, make sure to blog about those that are interesting to your readers.
7. Once you've written this linkable content (it's known as 'linkbait'), tell all your friends and contacts! As long as it's good, people won't mind.
8. Write a blog post that summarises all the other key bloggers in your niche. Talk about how much you've learnt from them and make sure you link to their blogs. Top bloggers will often monitor who links to them (as you should too), and, as long as your post is genuine, will often get in touch, link to you or comment on your post.
9. Playing the social media crowd can backfire. Instead of trying to get cheap links and traffic, engage honestly with your audience. There's absolutely no harm in talking about your blog and/or company on social media sites like Digg and Reddit, as long as what you're offering is useful, interesting or amusing in some way.
10. One way to attract positive attention online is to give something away. This can be a simple prize, some free advice or an experience; whatever suits your company. You should check out [competition rules](#) <sup>[281]</sup> first, and bear in mind that insisting people link to you to take part is against Google guidelines.

## Online Communities

An online community is a group of people that primarily interact via communication

media such as newsletters, telephone, email, online social networks <sup>[2]</sup> or instant messages <sup>[2]</sup> rather than face to face, for social, professional, educational or other purposes. If the mechanism is a computer network, it is called an online community <sup>[2]</sup>. Virtual <sup>[2]</sup> and online communities have also become a supplemental form of communication between people who know each other primarily in real life. Many means are used in social software <sup>[2]</sup> separately or in combination, including text-based chatrooms <sup>[2]</sup> and forums <sup>[2]</sup> that use voice, video text or avatars <sup>[2]</sup>. Significant socio-technical change may have resulted from the proliferation of such internet-based social networks. (from Wikipedia <sup>[282]</sup>).

**Definitions:** Social Networking in Plain English <sup>[283]</sup> by Common Craft.

**Communities:** TechSoup Community <sup>[284]</sup>; KnowHow NonProfit <sup>[285]</sup>; ICT Knowledgebase <sup>[286]</sup>.

**Networks:** The Charity Place <sup>[287]</sup>; NetSquared <sup>[288]</sup>; NTEN <sup>[289]</sup>; NTEN's Online Community Building Affinity Group <sup>[290]</sup> (free).

**Consultants:** Britt Bravo's Building Your Online Community with MyBlogLog: An Interview with Ian Kennedy <sup>[291]</sup> post; Kathy Sierra's How to Build a User Community <sup>[292]</sup> series; Rohit Bhargava's 10 Secrets of Successful Online Community <sup>[293]</sup>; Andrew Cohen's Characteristics of Successful Online Communities <sup>[294]</sup>.

**Organisations:** Non-profit Leadership Institute's Non-profit Good Practice Guide: Online Community Building through Discussion Boards <sup>[295]</sup>; Network for Good's Using Message Boards to Build Community <sup>[296]</sup>.

**Blogs:** Common Craft's Your Community is a Party Waiting to Happen <sup>[297]</sup> post; Beth Kanter's What, Why, and How of Facebook Pages: An Expertise Roundup from Mari Smith, Jesse Stay, Collin Douma, and Others <sup>[298]</sup> post.

**Tools:** LeFora <sup>[299]</sup>; MyBlogLog <sup>[231]</sup>; FriendFeed <sup>[300]</sup>; Ning <sup>[301]</sup>; Facebook Groups <sup>[302]</sup> and Facebook Pages <sup>[303]</sup>.

**Publications:** Managing Online Forums: Everything You Need to Know to Create and Run a Successful Community Discussion Board <sup>[304]</sup> by Patrick O'Keefe; Community Building on the Web: Secret Strategies for Successful Online Communities <sup>[305]</sup> by Amy Jo Kim; Online Community Handbook: Building Your Business and Brand on the Web <sup>[306]</sup> by Anna Buss and Nancy Straus.

## How to moderate a forum

by Amy

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1. Create your Terms and Conditions to include the legal requirements and stipulations for participation, but also the 'community' requirements and

stipulations you want your participants to adhere to (things like appropriate behaviour, off-limit topics, and so on). Also include the repercussions for contrary behaviour (will you delete posts that do not adhere to T&C? will you ban a user for continued bad behaviour?).

2. Empower your participants to start conversations and reply to threads as they see fit (you can use tools to encourage this use by showing recent activity on the site, providing ways for participants to subscribe to RSS or other alerts at new activity, and so on).
3. When stepping in regarding bad behaviour or other administrator actions, make the actions/communications public and cite the T&Cs specifically.
4. Encourage participants to self-moderate by giving a certain level of power over the conversation (this can be ways to note whether a comment or topic is flagged for moderation, to vote things up or down in quality/priority/interest, or to attribute a scale or point system to posts and/or users).

## Social networking

A social network service focuses on building online communities <sup>[307]</sup> of people who share interests and/or activities, or who are interested in exploring the interests and activities of others. Most social network services are web based <sup>[308]</sup> and provide a variety of ways for users to interact, such as e-mail <sup>[309]</sup> and instant messaging <sup>[310]</sup> services. Social networking has created new ways to communicate and share information. Social networking websites are being used regularly by millions of people, and it now seems that social networking will be an enduring part of everyday life. The main types of social networking services are those which contain directories of some categories (such as former classmates), means to connect with friends (usually with self-description pages), and recommender systems linked to trust. (from Wikipedia <sup>[216]</sup>)

**Definitions:** Social Networking in Plain English <sup>[283]</sup> by Common Craft.

**Communities:** WeAreMedia on Social Networking <sup>[311]</sup>.

**Networks:** Non-profit Organizations on Myspace <sup>[312]</sup>; Non-profit Organizations on Facebook <sup>[313]</sup>; NTEN's Social Networking Affinity Group <sup>[314]</sup> (free); Ning for Dummies <sup>[315]</sup> online network creators group.

**Consultants:** Beth Kanter's Social Networking primer <sup>[316]</sup>; Steve Bridger's Leveraging social networking to influence change <sup>[317]</sup> post; Dave McClure's 7 Steps to Graphing your Facebook Strategy <sup>[318]</sup> post; Beth Kanter's Determining Your Social Network Needs <sup>[319]</sup> post.

**Organisations:** Northwestern University research on Race, Ethnicity, Parent Education Predict Facebook Use <sup>[320]</sup>; Network for Good's Social Networking <sup>[321]</sup> section.

**Blogs:** Wild Apricot Blog First Steps in Social Networking for Non-profits <sup>[322]</sup> post; Brian Satterfield's What Can Social Networking Do for Your Organization <sup>[323]</sup> post in TechSoup; Beth Kanter's NpTech Summary: Social Networking Strategies and Non-profits: Getting Beyond Shiny Object Syndrome and Getting More Precise Practices <sup>[324]</sup> blog post.

**Tools:** [Facebook](#) <sup>[325]</sup>; [Myspace](#) <sup>[326]</sup>; [Ning](#) <sup>[327]</sup>; [Bebo](#) <sup>[328]</sup>; [LinkedIn](#) <sup>[329]</sup>; [My Charity Page](#) <sup>[330]</sup>.

**Data sources:** Jeremiah Owyang's [Social Networks Site Usage: Visitors, Members, Page Views, and Engagement by the Numbers in 2008](#) <sup>[222]</sup>; Wikipedia [List of Social Networking Websites](#) <sup>[331]</sup>; UK Fundraising [As](#) <sup>[332]</sup> [Facebook hits 150m users, Social Networking sites get 1 in 10 UK Christmas Internet visits](#) <sup>[332]</sup> article.

**Publications:** [People to People Fundraising: Social Networking and Web 2.0 for Charities](#) <sup>[333]</sup> by Ted Hart, James M. Greenfield, and Sheeraz D. Haji; [Social Networking: The Essence of Innovation](#) <sup>[334]</sup> by Jay Liebowitz; [The Stories of Facebook, Youtube and Myspace: The People, the Hype and the Deals Behind the Giants of Web 2.0](#) <sup>[335]</sup> by Sarah Lacy; [Web 2.0 Building Online Communities Using Social Networking Technologies](#) <sup>[336]</sup> (e-book) by Tim Rhodus, Victor van Buchem, and Bud Witney; [Ning For Dummies](#) by Manny Hernandez.

## How to set up a social network on Ning

By Nathalie McDermott; Sawy Chawwy

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1. Firstly, you need to consider the purpose of your network – who will be your members and why will they use this website above others? What need does your network address?
2. Go to [www.ning.com](http://www.ning.com) <sup>[327]</sup> and set up your network, choosing a catchy name and Ning web address. It's very simple; all you need is an email address and it takes a couple of minutes.
3. Choose how public or private it is going to be – can everyone on the web see and contribute to your network or will it be closed and private for your members only?
4. Give your network a tagline and short description – what's it all about? The tagline should consist of one pithy sentence, E.g. [www.savvyhawwy.com](http://www.savvyhawwy.com) <sup>[337]</sup>: 'A social network for young Gypsies and Travellers in the UK'.
5. Next, add features to your network. You can drag and drop functions like 'forum', 'chat', 'blog', 'video' & 'photos' into the front page. You might, for example, place the 'forum' function prominently in the middle of the page if having discussions is the main purpose of your network.
6. Choose a design – Ning will give you lots of templates to choose from and you can customise one with your own choice of images, fonts and colours.
7. Your network is now ready for content – help to define the network's identity by starting discussions, posting photos, adding videos etc that are relevant to the purpose of the website.
8. Invite people to the network – start by inviting relevant people and welcoming them by writing a note on their pages. If you're trying to attract a certain community don't send out blanket invites to attract a volume of members – the quality and relevance of your members is what will help it grow and develop into a sustainable space. You can support this by writing your own relevant joining up questions.
9. Keep the community active and interested – once you have a working network, keep your members engaged by making small changes to the site, adding new content and sending them relevant information (without spamming them with

constant messages!).

10. Ning is free but you can purchase optional services like the removal of ads, the ability to use your own domain name and extra storage.

## How to use Schoolofeverything.com

by Andy

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1. Visit <http://schoolofeverything.com> [338] and sign up. Enter your name and location so the site knows who and where you are.
2. [Tag](#) [2] yourself as learning 'Social by Social', and any other subjects you're interested in learning about.
3. If you want, browse the 'Scrapbooks' and read what other users are saying, including the scrapbook for '[Social by Social](#)' [339].
4. Type the keywords that interest you into the 'Search' box and you will get a list of teachers near you.
5. Click on the teachers near you who look interesting until you find one that you'd like to talk to.
6. Send them a message explaining what you'd like to know. They will be notified and will reply offering to meet up or sell you lessons.
7. If there's no-one who can help you right now, post up what you're looking for on your scrapbook and hopefully someone will get back to you.

## Rich media and content-sharing platforms

Photo sharing is the [publishing](#) [340] or transfer of a user's [digital photos](#) [341] online, thus enabling the user to share them with others (whether publicly or privately). This functionality is provided through both [websites](#) [234] and [applications](#) [191] that facilitate the [upload](#) [342] and display of images. The term can also be loosely applied to the use of online photo galleries that are setup and managed by individual users, including [photoblogs](#) [237]. (from [Wikipedia](#) [343]).

[Streaming media](#) is [multimedia](#) [344] that is constantly received by, and normally presented to, an [end-user](#) [345] while it is being delivered by a streaming provider (the term 'presented' is used in this article in a general sense that includes audio or video playback). The name refers to the delivery method of the medium rather than to the medium itself. The distinction is usually applied to media that are distributed over [telecommunications networks](#) [346], as most other delivery systems are either inherently streaming or inherently non-streaming. (from [Wikipedia](#) [347]).

A video hosting service allows individuals to [upload](#) [348] [video clips](#) [349] to an [internet](#) [180] website. The video host will then store the video on its server, and show the individual different types of code to allow others to view this video. The website, mainly used as the

video hosting website, is usually called the video sharing website. (from [Wikipedia](#) <sup>[347]</sup>).

**Definitions:** [Podcasting in Plain English](#) <sup>[350]</sup> and [Online Photo Sharing in Plain English](#) <sup>[351]</sup> by Common Craft.

**Communities:** WeAreMedia on [Podcasting](#) <sup>[352]</sup>; WeAreMedia on [Photo Sharing](#) <sup>[353]</sup>; WeAreMedia on [Video Sharing](#) <sup>[354]</sup>; NTEN's [Video Blogging Affinity Group](#) <sup>[355]</sup>(free); NTEN's [Flickr for Non-profits Affinity Group](#) <sup>[356]</sup>(free).

**Networks:** [Non-profit Organizations YouTube Channel](#) <sup>[357]</sup>.

**Consultants:** Aquifer Media's [12 Tips for Running Your Own User-Generated Video Contest](#) <sup>[358]</sup>; See3 Communications' [Guide to Online Video](#) <sup>[359]</sup>; Beth Kanter's [Flickr and Non-profits Primer](#) <sup>[360]</sup>.

**Organisations:** [YouTube's Non-profit Program](#) <sup>[361]</sup>; [Flickr for Good](#) <sup>[362]</sup> with TechSoup.

**Blogs:** ReadWriteWeb's [Store, Tag and Print: 10 Great Photo Sharing Services](#) <sup>[363]</sup> post; Agent Change's [Non-profits: Using YouTube to Raise Money](#) <sup>[364]</sup> blog post on NetSquared; Beth Kanter's [Ten Cool Examples of Non-profits Using Flickr](#) <sup>[365]</sup>! blog post on BlogHer; Beth Kanter's [How Non-profits Can Get the Most out of Flickr](#) <sup>[366]</sup> blog post on TechSoup; Wild Apricot's [Five Ways Non-profits Can Use Flickr to Reach New Audiences](#) <sup>[367]</sup> blog post; John Haydon's [The Six Sees of Video for Non-profits](#) <sup>[368]</sup> post; Emergence Media's [Social Media Not To Go Mainstream in Business in 2009](#) <sup>[369]</sup> post & ebook.

**Tools:** [Blip.tv](#) <sup>[370]</sup>; [Flickr](#) <sup>[371]</sup>; [YouTube](#) <sup>[372]</sup>; [DoGooderTV](#) <sup>[373]</sup>; [UStream](#) <sup>[374]</sup>; [Qik](#) <sup>[375]</sup>; [Vimeo](#) <sup>[376]</sup>.

**Data sources:** Mashable's [Video Toolbox: 150+ Online Video Tools and Resources](#) <sup>[374]</sup>.

**Publications:** [How to Use Flickr: The Digital Photography Revolution](#) by <sup>[377]</sup>Richard Giles; [Flickr Hacks: Tips & Tools for Sharing Photos Online](#) <sup>[378]</sup> by Paul Bausch and Jim Bumgardner; [YouTube for Dummies](#) <sup>[379]</sup> by Doug Sahlin and Chris Botello.

## How to make and publish quick videos for the web

by Andy

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Shooting and uploading video on the web has never been easier. You can shoot quick headshot interviews and stick them on YouTube or other video-sharing sites (see above), or produce more sophisticated offerings, all from the comfort of your computer.

1. If you don't have access to a video camera, by a Flip camera. They shoot web-ready videos very easily and they're incredibly cheap too. Any DV camera works fine though.
2. Pick a simple idea. A film that can be shot in one take will save you hours of editing, whilst something that needs particular location or lighting conditions will absorb hours of shooting time.

3. Shoot the footage. Try not to make the shots too busy or full, and focus on people's faces to keep it interesting for the viewer. (People like to watch other people.) Don't worry about quality too much, but shoot in as much light as possible and avoid background noise wherever you can.
4. Download the footage to your PC or Mac from the camera. Name the clips clearly so you can find them quickly and tell them apart.
5. Edit your movie together using either free software like [Mac's iMovie](#) <sup>[380]</sup> or [Windows MovieMaker](#) <sup>[381]</sup>, or a cheap commercial tool like [Adobe Premiere Elements](#) <sup>[382]</sup>. Make it as short as possible, and definitely under 10 minutes. A good rule of thumb is to edit it to your ideal length - and then cut it by half.
6. If you're worried about quality, you can get a lot of improvement from taking the soundtrack out and cleaning it up in a wave editing package like [Audacity](#) <sup>[383]</sup>. Sound matters when pictures are small.
7. Export your finished file as .mov, .avi or .mpg format (all are fine), in 340x240 resolution. There's a 100MB size limit on [YouTube](#) <sup>[384]</sup> so check the file size to make sure – the smaller the better.
8. Sign up for a [YouTube](#) <sup>[384]</sup> account. Click on 'Upload Videos' in the top right of the home page.
9. Upload the video and give it a title, description, tags, category, and language. Choose tags and categories that will help people find it, and a description that will make people want to watch it.

Once you've got your video on [YouTube](#) <sup>[384]</sup>, or on other video services, you can link to it and embed it on your blog, website or Facebook page, and e-mail the link to your friends and contacts. Good luck!

## Marketing

Social media marketing has two important aspects. The first, SMO, refers to on-page tactics through which a webmaster can improve a website for the age of social media. Such optimisation includes adding links to services such as Digg, Reddit and Delicious so that their pages can be easily 'saved and submitted' to and for these services. Social media marketing, on the other hand, is about building ways that fans of a brand or company can promote it themselves in multiple online social media venues. (from [Wikipedia](#) <sup>[385]</sup>).

**Communities:** WeAreMedia '[Spreading awareness and generating buzz](#)' <sup>[386]</sup>.

**Networks:** NTEN's [Emarketing for Good Affinity Group](#) <sup>[387]</sup>(free).

**Consultants:** Katya Anderson's [Non-profit Marketing](#) <sup>[388]</sup>blog; Beth Kanter's [How to Think Like a Non-profit Social Media Marketing Genius](#) <sup>[389]</sup> presentation; Jocelyn Harmon's [Marketing for Non-profits](#) <sup>[390]</sup>blog; Jon Rognerud's [Social media Marketing Beginner's Guide](#) <sup>[391]</sup>; Webcredible's [Social Media Marketing Guide](#) <sup>[392]</sup>; Kivi Leroux Miller's [Non-profit Marketing Guide](#) <sup>[393]</sup>.



**Organisations:** NPower Seattle's Tech-Savvy Communications: A Toolkit for Non-profits [394].

**Blogs:** Nedra Kline Weinreich's Strategic Social Marketing for Non-profits [395]post; Ben Willis' The Five Pillars of Social Media Marketing [396] post; Chris Abraham's Online Social Media Marketing is a Must [397]post.

**Tools:** Anywhere you have a profile or presence (a website, a profile [2] page, or even a comment on a blog [2]).

**Data sources:** Research and data from eMarketer [398]; Cass Business School Centre for Charity Effectiveness Charity Marketing Survey Analysis [399] conducted by RSM Robson Rhodes.

**Publications:** Social Media Marketing: An Hour a Day [400]by Susan Bratton and Dave Evans; Advertising 2.0: Social Media Marketing in a Web 2.0 World [401] by Tracy L. Tuten; The Social Media Marketing Manifesto: A Guide to Networking Branding and Awareness [402] by Tamar Weinberg; The DIY Guide to Marketing: For Charities and Voluntary Organisations [403] by Moi Ali; Purple Cow [404]by Seth Godin; The Tipping Point [405]by Malcolm Gladwell; The Cluetrain Manifesto [4]by Rick Levine, Christopher Locke, Doc Searls and David Weinberger.

## 10 Search Engine Marketing tips

By Lucy Langdon, Search Marketer at Distilled

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Distilled are a vibrant online marketing company who specialise in online reputation management, search engine marketing and website design. www.distilled.co.uk [406]

1. Your website needs to be read both by visitors and by the search engines. Speak in your visitors' language, keep things simple, and you're well on your way to making your site search engine friendly as well.
2. It's really important to check you're using the same keywords as your potential visitors. Otherwise, how else will they find you? Use tools like SEObook's keyword suggestion tool [177]to make sure you've got your finger on the pulse.
3. Title tags are very important for SEO. They appear in the bar of your browser and on the search engine results page. There are three basic rules: each page should have a unique title tag; each title tag should naturally include the keyword/s for its page; the title tag should be fewer than 65 characters.
4. Like title tags, header tags tell your visitors and the search engines what's important on each particular page. Again, three rules: put your most competitive keyword for the page in an h1 tag; only have one h1 tag per page; put your other keyword/s in h2, h3, h4 etc tags.
5. There are no golden rules about how many times to use your keywords in on page copy. If you write naturally for your visitors, the copy should naturally appeal to the search engines as well.
6. Visitors and search engines need to be able to find their way around your website.



Make sure the navigation is straightforward; links should be prominent and, if possible, they should use the keyword of the page they are pointing to.

7. Search engines need to know they can trust your site and that their users will appreciate finding you. One of the ways they do this is by looking at that sites link to yours- it's a bit like a recommendation or endorsement. Think about how and where you can get some natural links from around the web.
8. Google is the main player when it comes to search engines. If the traffic it sends to your site is important to you, you should play by its rules <sup>[178]</sup>. There are lots of 'guidelines', but here are the two most important: Don't pay for links and don't cloak content (show different content to users and search engines).
9. Visitors and search engines alike have a relatively short attention span. Be concise. Try and put all your most important information close to the top of each page.
10. There is a lot to learn about SEO. SEOmoz.org [<http://www.seomoz.org>] <sup>[179]</sup> is a great repository of accurate information and will keep you up to date on all the industry news.

## How to make the most out of Google AdSense

By Manny Hernandez, TuDiabetes

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If you run your network on Ning, there is a good chance that you will choose to control your own ads, to help you monetise your network.

One of the most popular options for running ads (though certainly not the only one) is Google AdSense. A lot has been written about this, so I am focusing these tips on the things that have worked the most for me:

- Include your Google AdSense code in a place where the ads get as many impressions (pageviews) as possible.
- Place your ads code where the ads will get a higher chance of being clicked on: it is clicks on ads, not impressions alone, that will result on revenue for you.
- Try to balance placement of your ads with a healthy member experience: if you make your ads too intrusive, you may alienate a few people who may find your site too annoyingly commercial. Grow your network and make sure there is relevant, fresh content on it. This is important because Google Ads are contextual, so they 'feed' of the topic being written about on the page and serve ads that are pertinent to it. Keep an eye on the ads: occasionally unscrupulous advertisers will pay their way to get their ads positioned among your network's Google Ads. You can make use of AdSense's Competitive Ad Filter to get rid of the offending URL.

## Project Management and Collaboration

A wiki is a page or collection of Web pages designed to enable anyone who accesses it to contribute or modify content, using a simplified markup language. Wikis are often

used to create collaborative websites and to power community websites. The collaborative encyclopaedia Wikipedia is one of the best-known wikis. Wikis are used in business to provide intranet and Knowledge Management systems. Ward Cunningham, the developer of the first wiki software, WikiWikiWeb, originally described it as “the simplest online database that could possibly work”. (from [Wikipedia](#) <sup>[407]</sup>).

**Definitions:** [Wikis in Plain English](#) <sup>[408]</sup> by Common Craft.

**Networks:** [Wiki Wednesdays](#) <sup>[409]</sup> in London.

**Consultants:** Wild Apricot's [Online collaboration tools for non-profit board members](#) <sup>[410]</sup> post about Google Documents; Beth Kanter's [Wiki primer](#) <sup>[411]</sup>; [Online Project Management Software in the Real World](#) <sup>[412]</sup> by Michele Murrain and Laura Quinn from Idealware; Andy Gibson's [The Human Intranet](#) <sup>[413]</sup> presentation.

**Organisations:** Basecamp shares [case studies](#) <sup>[414]</sup> about how organisations use their tool.

**Blogs:** [Organizational Wikis Keep Knowledge From Walking Out the Door](#) <sup>[415]</sup> by Michael Stein in the Non-profit Times; Non-profitTechBlog's [Non-profit Project Management](#) <sup>[416]</sup> post; [From Zero to Sixty: What type of Project Management tool is appropriate?](#) <sup>[417]</sup> by Peter Campbell; [What Would an Ideal Project Management Tool Look Like?](#) <sup>[418]</sup> by Andrew Filev.

**Tools:** [Huddle](#) <sup>[419]</sup>; [Basecamp](#) <sup>[420]</sup>; [wikis](#) <sup>[2]</sup>; [Google Apps](#) <sup>[421]</sup>; [Google Docs](#) <sup>[7]</sup>.

**Data sources:** Read the [comparison of wiki software](#) <sup>[422]</sup> on Wikipedia.

**Publications:** [Using Wikis for Online Collaboration: The Power of the Read-Write Web \(Online Teaching and Learning Series \(OTL\)\)](#) <sup>[423]</sup> by James A. West and Margaret L. West; [How Wikipedia Works](#) <sup>[424]</sup> by Charles Matthews, Ben Yates Phoebe Ayers; [21st Century Collaboration Resources](#) <sup>[425]</sup> by Michael C. Gilbert; [The Wisdom of Crowds](#) <sup>[426]</sup> by James Surowiecki; [Here Comes Everybody](#) <sup>[427]</sup> by Clay Shirky.

## How to set up a virtual office

by Andy

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There are so many cheap and free tools for running a business these days, it's a wonder why organisations still spend so much on IT. Here are a few tools to try out to increase your productivity:

1. E-mail and calendar from [Google Apps](#) <sup>[428]</sup>. Get you and all your staff e-mail addresses at your company's web address, plus task, calendar and scheduling – all for free!
2. Shared document drive from [Windows Live Sync](#) <sup>[429]</sup>. Share and sync documents whenever you're online from any computer in your network, and work on them offline too.

3. Telephone and video conferencing from [Skype](#) [430]. Get everyone in your team signed up and make free voice and video calls wherever you are, and hold team chats while you work collaboratively. You can also buy Skype-in numbers so others can call you from normal phones.
4. Contact management from [Highrise](#) [431] or [SugarCRM](#) [432]. Cheap CRM tools to keep track of who you've contacted and what you said to them.
5. Document co-authoring from [Google Docs](#) [433]. Write spreadsheets together in meetings and author word docs concurrently with colleagues without all the usual version control hassles.
6. Task and collaboration tools from [Huddle](#) [434]. Record minutes of meetings, work on documents together, assign tasks and swap updates in this free project admin tool. ([Basecamp](#) [435] is good too.)
7. Simple intranet from [iGoogle](#) [278]. Google offers its custom homepage features to businesses too, so you can set up a team or company homepage filled with feeds from useful sites and their tools.
8. Team blog from [Wordpress](#) [275]. Set up a private or public blog to post updates from meetings, projects and other useful information, and cut down on company e-mail.
9. Digital office chatter from [Twitter](#) [436] or [Yammer](#) [437]. Don't miss out on the hum of office life: keep your colleagues in the loop with these free and cheap micro-blogging services.
10. Research and link sharing from [Delicious](#) [438] and [School of Everything](#) [338]. Don't keep your sources hidden in your favourites, share and tag them publicly so colleagues can use them too.

There are new productivity tools emerging all the time, and most of them are free or cheap, so keep checking the resources above for the latest updates. And remember to share any good stuff you find back here too!

## Innovation and risk management

Innovation means a new way of doing something. It may refer to incremental, radical, and revolutionary changes in thinking, products, processes, or organizations. A distinction is typically made between Invention, an idea made manifest, and innovation, ideas applied successfully. (from [Wikipedia](#) [439])

Risk management is activity directed towards the assessing, mitigating (to an acceptable level) and monitoring of risks to an enterprise. Risk management deals with risks to a specific project, asset or thing of value. In some cases the acceptable risk may be near zero. Risks are any and all events that could potentially occur, that would be detrimental to the interest or value of the object to which risk must be managed. (from [Wikipedia](#) [440])

**Communities:** WeAreMedia [‘Dealing with Resistance’](#) [61].

**Networks:** [Social Innovation Camp](#) [441]; [The Entrepreneurship and Innovation Exchange](#) [442] (Ning); [Open Innovation Exchange](#) [443].

**Consultants:** David Wilcox's [Developing the New Media Open Innovation Exchange](#) [444] post.

**Organisations:** [Innovation Exchange](#) [445]; [Non-profit Risk Management Centre](#) [446]; PolicyLink's [Bridging the Innovation Divide: An Agenda for Disseminating Technology Innovations within the Non-profit Sector](#) [447] report; Charity Commission's [Charities and Risk Management](#) [448] guide; NCVO's [What is Risk Management](#) [449]; [The Institute of Risk Management](#) [449].

**Blogs:** [Bill Gates, Warren Buffet and Innovation in the Non-Profit Sector](#) [450] by Bruce Nussbaum in Business Week; [Innovation at Work: Helping Non-profits Raise the Bar on Ingenuity](#) [451] by GuideStar.

**Publications:** [Managing Technology to Meet Your Mission: A Strategic Guide for Non-profit Leaders](#) [452] by Holly Ross, Katrin Verclas, Alison Levine, and NTEN; [Non-profit Risk Management and Contingency Planning: Done in a Day Strategies](#) [453] by Peggy M. Jackson; [Managing Risk in Non-profit Organizations: A Comprehensive Guide](#) [454] by Melanie L. Herman, George L. Head, Peggy M. Jackson, and Toni E. Fogarty; [The Search for Social Entrepreneurship](#) [455] by Paul Charles Light; [From the Ground Up: Grassroots Organizations Making Social Change](#) [456] by Carol Chetkovich; [NGO Accountability: Politics, Principles and Innovations](#) [457] by Michael Edwards, Lisa Jordan, and Peter van Tuijl.

## Dealing with bad press

by Amy

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1. Prepare your staff, board and especially your executive leadership for the possibilities of people saying misleading, wrong or bad things about your organisation, your services, your programs or you work. People are already talking about you, but social media allows you to find those conversations and participate.
2. If you've set up Google Alerts and searches on other sites like Google Blog Search and Technorati, you will be able to quickly find conversations taking place online that are both positive and negative. Both are opportunities to join in and participate.
3. Take a deep breath: dealing with bad press online is like dealing with bad press in front of a huge room full of people and reporters – except that online the audience can be enormous.
4. Answer respectfully but honestly, and always publicly. If someone is talking about your organisation on their blog, leave a public comment that explains your real mission, your services, your programs or whatever is relevant to their gripes (but don't feel obligated to go into detail about every aspect of your organisation, just focus on their issues).
5. Be sure to include links for how the author and other readers can learn more about your organisation as well as to connect with you for more information and follow

- up, proving you are real and that your organisation really does care.
6. Take the complaints back to your team: there is a reason someone or many people are complaining and if you can 'fix' a deeper problem, you won't have to continue commenting on blogs or forums about the issue.
  7. Use the instance to start a conversation on your own organisation's blog: include the original complaints (with links!), the comments you left, and then open up a conversation about your organisation's services/programs/etc. that are pertinent to the conversation as well as the strategies and social media tools you are using for conversation about those topics, and ask for ideas, comments and feedback.

## Events and facilitation

An unconference is a facilitated, participant-driven conference <sup>[458]</sup> centered around a theme or purpose. The term 'unconference' has been applied, or self-applied, to a wide range of gatherings that try to avoid one or more aspects of a conventional conference, such as high fees and sponsored presentations. For example, in 2006, CNNMoney applied the term to diverse events including BarCamp <sup>[459]</sup>, Bloggercon <sup>[460]</sup>, and Mashup <sup>[461]</sup> Camp. The term is primarily used in the geek <sup>[462]</sup> community. (from Wikipedia <sup>[463]</sup>).

A webinar is a neologism <sup>[464]</sup> to describe a specific type of web conference. It is typically one-way, from the speaker to the audience with limited audience interaction, such as in a webcast <sup>[465]</sup>. A webinar can be collaborative and include polling and question & answer sessions to allow full participation between the audience and the presenter. In some cases, the presenter may speak over a standard telephone line, pointing out information being presented on screen and the audience can respond over their own telephones, preferably a speaker phone. There are web conferencing technologies on the market that have incorporated the use of VoIP audio technology, to allow for a truly web-based communication. Webinars may (depending upon the provider) provide hidden or anonymous participant functionality, enabling participants to be unaware of other participants in the same meeting. (from Wikipedia <sup>[466]</sup>).

**Communities:** Designing Collaboration <sup>[467]</sup> Wiki (lessons).

**Consultants:** David Wilcox's Giving Facilitators the FLIP <sup>[468]</sup> post; David Wilcox's Social media, social web, social networking ... time for the social reporter <sup>[469]</sup> post; David Wilcox's Capturing Stuff, Conversations and Stories <sup>[470]</sup> post; David Wilcox's Collaboration needs real pay-offs. Where does tech best fit <sup>[471]</sup> [?](#) post; David Wilcox's Reflections on event social reporting <sup>[472]</sup> post.

**Organisations:** Aspiration Tech's Event Planning for Non-profits <sup>[473]</sup> resource guide; Idealware's A Few Good Event Registration Tools <sup>[474]</sup> article; bassac's Collaboration Benefits <sup>[475]</sup> program.

**Tools:** Upcoming [476]; Meetup [477]; Eventful [478]; EventBrite [479]; Craigslist [479]; Gumtree [480]; Third Sector Forums [481].

**Publications:** Black Tie Optional: A Complete Special Events Resource for Non-profit Organizations [482] by Harry A. Freedman and Karen Feldman.

## Website design and content

A website is a collection of Web pages [183], images, videos or other digital assets that is hosted on one or more web servers [483], usually accessible via the internet [180]. A Web page is a document, typically written in (X [484])HTML [485], that is almost always accessible via HTTP [486], a protocol that transfers information from the Web server [483] to display in the user's Web browser [487]. All publicly accessible websites are seen collectively as constituting the 'World Wide Web' [488]. (from Wikipedia [234])

**Communities:** TechSoup's Web Building forum [489].

**Networks:** NTEN's Non-profit Webmasters Affinity Group [490](free); Charity Webmasters Forum [491](Yahoo! Group email list); London Net Tuesday [492]group.

**Consultants:** A Non-profit's Guide to Websites [493] by 47Media; 10 Great Tips for Your Non-profit Website [494] by See3; Jason King's worksheet to help you plan your website [495].

**Organisations:** Idealware's Comparing Open Source CMSs: Joomla, Drupal and Plone [496]article; Idealware's A Few Good Tools to Manage Content on Simple Sites [497]article; Idealware's How Much Does a Non-profit Website Cost [498]? by Laura S. Quinn.

**Blogs:** Olga Sanchez-Howard's Designing for Non-profits: User Experience Professionals Can Make a Difference in Society [499] post; ProBlogger's How to Write Great Blog Content [500]post; Blog Critics Magazine's How to Write Great Website Content [501]article; PJ Fusco's From Good to Great Content [502]post; Steven Snell's 40 Inspirational Non-Profit Website Designs [503]post; Mike Kujawski's Simple Lesson in Public Sector/Non-Profit Website Return on Investment (ROI) [504] post; Brian Reindel's Ten inspiring and beautiful non-profit Web designs [505] post; Usability First's Website Design [506]resources.

**Tools:** Post your Pro-Bono Design Project [507]on Idealist (to get free web design); record user testing with Silverback [508]; or commission it remotely from UserTesting.com [509]. And for the more technically-minded, check out the Startup Tools Wiki [510]created by London startup Songkick [511].

**Publications:** The Websters' Dictionary: How to Use the Web to Transform the World [512] by Ralph Benko; Branding for Non-profits [513] by D.K. Holland; Web Design for Dummies [514] by Lisa Lopuck; 200 Terrific Web Sites for Non-profit Organizations [515] by Brownie S., Ph.D. Hamilton.

# Legal, licensing and content sharing

Creative Commons (CC) is a non-profit organization <sup>[516]</sup> devoted to expanding the range of creative <sup>[517]</sup> works available for others to build upon legally and to share. The organisation has released several copyright licenses known as Creative Commons licenses <sup>[518]</sup>. These licenses allow creators to communicate which rights they reserve, and which rights they waive for the benefit of other creators. (from Wikipedia <sup>[519]</sup>).

The GNU General Public License is often called the GNU GPL for short; it is used by most GNU programs, and by more than half of all free software packages. The latest version is version 3. (from GNU Operating System website <sup>[520]</sup>).

**Consultants:** Red Earth's Email Disclaimers to Protect Your Organization <sup>[521]</sup> article; Amit Asaravala's Reprint Our Articles Without Asking. Seriously <sup>[522]</sup> article; Susan Tenby's Things You Can Do to Prevent Spam <sup>[523]</sup> article.

**Organisations:** Creative Commons UK <sup>[524]</sup>; Creative Commons International <sup>[525]</sup>; GNU <sup>[526]</sup>; Charity Law and Regulations <sup>[527]</sup> from NCVO; Out-law <sup>[528]</sup> from Pinsent Masons.

**Blogs:** Why Use Creative Commons <sup>[524]</sup> from CC UK; Steve Imparl's 10 Essential Legal Points for Bloggers <sup>[529]</sup> post; Online Video, Search Marketers and Legal Issues <sup>[530]</sup> interview by Grant Crowell; Brian Satterfield's Understanding Video-Sharing Sites' Terms of Service <sup>[531]</sup> post on TechSoup; Sean Carton's YouTube: Another Casualty in the Copyright Wars <sup>[532]</sup> post.

**Data sources:** Creative Commons Licenses Explained <sup>[533]</sup> by CC UK; Experts Online <sup>[534]</sup> for Legal Issues.

## The Social by Social Game

The Social by Social game is an event format designed to help a group of people explore how social technology might be used for social benefit, in a context that's relevant to them and their work. It's a mix of collaboration and competition that should give your stakeholders lots of practical ideas that would work in real projects.

A group of people, perhaps from within an organisation and/or its stakeholders, or a local neighbourhood, develop a scenario together containing problems to be solved. The group chooses problems to work on and splits into teams, with each team using the cards provided to put together a pitch for a 'social by social' solution to the problem. It's a good way to get people talking about social problems and new technologies – and



you might find some real projects that people in your organisation want to work on with you.

The game was developed by David Wilcox, Amy Sample Ward and Andy Gibson, based on the [Social Media Game](#) <sup>[535]</sup> originally developed by Beth Kanter, David Wilcox and Drew Mackie. Like this book, the game is Creative Commons licensed and can be used, remixed and copied freely with appropriate attribution.

You can run the game yourself, or hire us to run it for you. You can also take the materials and remix them into other formats, or just use them as prompts for your own thinking.

Read more about previous times we've run the game and download the cards yourself at:

[socialbysocial.wordpress.com/tag/game](http://socialbysocial.wordpress.com/tag/game) <sup>[536]</sup>

## How-tos

Throughout this handbook, we've included short practical guides on "how to" do various technical and practical tasks. We've collected them all together here so you can refer to them easily - everything from how to subscribe to an RSS feed, to how to build a sustainable income stream for your project. We hope you find them useful, and we also hope you'll add to this resource online by correcting any mistakes and sharing your own how-tos on all the many things we haven't covered here.

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Title	Author
<a href="#">How to become a digital activist</a> <sup>[34]</sup>	David and Amy
<a href="#">How to introduce social technology to an organisation</a> <sup>[34]</sup>	David
<a href="#">How to create a blog strategy</a> <sup>[537]</sup>	Amy
<a href="#">How to find out what's already been done by others</a> <sup>[538]</sup>	Amy
<a href="#">How to find and join the conversations that are already happening</a> <sup>[539]</sup>	Amy
<a href="#">Getting started with social technologies</a> <sup>[26]</sup>	Steph Gray
<a href="#">How to handle organisational culture shift</a> <sup>[540]</sup>	Amy
<a href="#">How to plan social technology for an organisation</a> <sup>[540]</sup>	David
<a href="#">Ten tips on making a business case for 'risky' projects</a> <sup>[541]</sup>	Andy
<a href="#">How to design a homepage</a> <sup>[542]</sup>	Colin Tate
<a href="#">How to manage an online community</a> <sup>[543]</sup>	Jenny Reina



<u>How to run user testing on your website</u> [141]	Andy
<u>Dealing with inappropriate content</u> [141]	Jenny Reina
<u>How to build a sustainable income stream for a social enterprise</u> [544]	Paul Hodgkin
<u>Identifying metrics &amp; measuring return on investment</u> [545]	Amy
<u>How to use tagging and RSS aggregation to gather supporters</u> [22]	Simon Berry
<u>How to build the brand for a creative enterprise</u> [63]	Cyndi Rhoades
<u>How to engage vulnerable people in a video production project</u> [64]	Sue-Jane O'Keefe
<u>How to turn a film into a campaign</u> [546]	Beadie Finzi
<u>Nathalie McDermott's lessons from the Sawy Chawwy project</u> [68]	Nathalie McDermott
<u>How to use social media to engage hard-to-reach groups</u> [547]	Jenny Irish
<u>10 Search Engine Optimisation tips</u> [548]	Lucy Langdon
<u>How to subscribe to an RSS Feed</u> [144]	Amy
<u>How to create a Google Alert</u> [144]	Amy
<u>How to use Delicious.com</u> [144]	Amy
<u>How to choose tags for your organization</u> [144]	Amy
<u>How to get your project online quickly and cheaply</u> [147]	Andy
<u>How to use blogging to improve your search engine position</u> [147]	Lucy Langdon
<u>How to moderate a forum</u> [549]	Amy
<u>How to set up a social network on Ning</u> [146]	Nathalie McDermott
<u>How to use Schoolofeverything.com</u> [146]	Andy
<u>How to make and publish quick videos for the web</u> [149]	Andy
<u>10 Search Engine Marketing tips</u> [550]	Lucy Langdon
<u>How to make the most out of Google Adsense</u> [550]	Manny Hernandez
<u>How to set up a virtual office</u> [551]	Andy
<u>Dealing with bad press</u> [552]	Amy
<u>How to publish a book</u> [553]	Andy

## Still want more?

Browse the [School of Everything Scrapbook](#) for 'Social by Social' for more useful learning resources.

Follow the links around on [Wikipedia](#) and read more about the key terms and projects in this space.

Read these books:



Go to at least one [Meetup](#) in your area about new technologies, web 2.0 or social innovation.

Follow the top people on [Twitter](#) for relevant keywords like [#socialmedia](#), [#web20](#) and '[social by social](#)'

Find yourself a local [web 2.0 teacher](#) or a technology mentor on [School of Everything](#).

Check out what [NetSquared](#), [Social Innovation Camp](#) and the Social Media Cafes are up to.

Contact the authors of this book and ask us round for a cup of tea, or invite us in to run an introductory workshop for you or your organisation.

Or just dive in: search for the various key concepts, tools and software in Google and read what comes up. After all, the best place to learn about all these new technologies is online.

And whatever you do, remember to enjoy yourself!

## What this means for you

Advice from the experts on how this stuff will actually affect you

# What this means for the Government

WILLIAM PERRIN, Talk About Local

When complaints are freely heard, deeply considered and speedily reformed, then is the utmost bound of civil liberty attained that wise men look for.” - *John Milton (1608–1674)*

For the government, social technology is about an enforced loss of control and increasingly uncomfortable transparency. The impact will be felt from national strategy and policy in Whitehall all the way down to district and parish councils’ public services. The impact will fall most heavily on those who have the highest proportion of customer facing services and on those who cling the most to old ways of communicating. Local government will be especially hard hit.

We can already see emergent tools and methods that will become mainstream in the next few years. The mainstream adoption of self publishing (aka blogging) and routine politicisation (‘small p’) of discussions on social networks will be disruptive, even though these tools are already ‘unfashionable’ in fast moving social media world.

Government has a set of actions in the Power of Information <sup>[554]</sup> (disclosure - I commissioned this work when I worked in central government) that will prepare them for this new environment. However bureaucracies take a long time to change and there will be a challenging transition akin to the arrival of rolling news and full time media management in the late 1990s.

Some parts of the public sector will experience sudden disruptive storms whipped up by social media unless they takes steps now to learn how to communicate in this medium <sup>[555]</sup>. The future trends need to be understood at all levels for our bureaucracies to adapt and adjust.

## Future trends for the public sector

As it gets cheaper and easier for individuals to engage in a political or civic process, the result will be a massive increase in engagement.

This trend is critical and runs through almost all of the examples in this handbook. The 19th Century processes of democracy act as a throttle or choke on democratic expression. High hurdles are presented by going to a meeting in a drafty town hall at an inconvenient time in the evening (or while you are at work) where there is no childcare nor even coffee. Most MPs, councilors and public bodies still prefer a letter on paper, despite the massive social decline in letter writing. When a 21st Century interface is put on the system to bring engagement down to a few clicks, the number of people who will engage increases by one or two orders of magnitude - this is very difficult for any organisation to deal with.

The Downing Street e-petitions service <sup>[556]</sup> is instructive: an 18th Century system was

put online using a simple, robust interface. 1.8 million people signed a petition on road pricing, huge numbers through a viral email which was then on the front of every newspaper for weeks in a self-reinforcing circle of promotion. There have been over 8million signatories to petitions on the system as a whole, so far. If this scale of democratic engagement were applied to something less constitutionally benign than petitions the impact could be remarkable.

19th century methods of engagement still dominate political discourse and rely upon face to face time. Processes are dominated by the self confident, literate, often males and people with lots of time to spare to go to meetings in out of the way places at inconvenient times or read long documents. If people in the modern world wanted lots of face to face time to do things they would not use Amazon nor eBay nor Tesco Direct nor even Netmums. The agents of the democratic process and the public sector will have to reflect this in the way they engage. This goes beyond service delivery online but in the way they engage in debate on policy. In London's Kings Cross we saw a good example recently by my Councillor Paul Convery, at the link he concludes a local web discussion with some great information and help <sup>[557]</sup>.

## Self publishing – unlocking every voice

Consumer blogging platforms designed to be easy to use for regular folk are a huge breakthrough in publishing. Platforms such as Wordpress <sup>[558]</sup> or Blogger <sup>[558]</sup> allow zero budget groups to get an effective web presence for the first time. The micro-economics at work are powerful: lower cost communication means more of it. <sup>[559]</sup>

There is a self reinforcing circle. It is both easier for people to organise campaigns online and for people to take part in them. This will see more campaigns, with more people involved. In London's deprived Kings Cross we have reinforced and stimulated community action by using a volunteer website <sup>[560]</sup> to keep all the local campaigns in touch.

However, out on the ground in communities most people don't realise that it is now easy to set up a site and to prevent extremists taking it over – which I often find as a major concern. My Talk About Local <sup>[561]</sup> project aims to address this by bringing the simple skills to over 150 communities.

Huge online common interest tribes are appearing that don't realise their own potential power. These sleeping giants are often huge discussion forums with many hundreds of thousands or millions of posts and tens or hundreds of thousands of members. If these groups choose to run large campaigns or become 'politicised' as virtual organisations, and importantly keep their members with them as the organisation changes emphasis, they could have a substantial impact. These large networks use modern values and ways of communicating, so they are bound to be more attractive than traditional organisations and NGOs that use older, more time consuming, less convenient methods.

Netmums <sup>[562]</sup> has over 600,000 members nationally and is an entirely online network –

comfortably bigger than the main political parties. The Sheffield Forum <sup>[563]</sup> has 75,000 members and 3.4m posts – and the population of the city is only 450,000.

The cumulative impact of these changes suggests potentially huge numbers engaging in digital media across many new outlets. This is very hard for anyone cope with, government or not. It presents challenges too numerous to list here. Factional capture of large unrepresentative campaigns will be a major issue for government. Even US guru Clay Shirky <sup>[564]</sup> is pessimistic about the ability of technology to provide checks and balances in large online campaigns - citing the pro-marijuana campaign <sup>[565]</sup> on Barack Obama's Change.gov <sup>[566]</sup>. For the public sector, simple physical processing of very high volumes of public correspondence is also a huge challenge – a democratic government can't simply put it all in the bin.

During adjustment to new processes there is a risk of frustration from the public that the public sector doesn't respond to new methods of communicating.

## Changing Whitehall and government itself

Whitehall and local government still use many business processes from the 19th Century, especially in statutory areas. With some noble exceptions, office technology has often just sped-up the transmission of minutes and documents <sup>[567]</sup>.

Radical changes are needed to ways of working using tried and tested methods from the private sector. But for the public sector, security is a major huge hurdle to an open fluid information working environment. The threats government faces are face higher and more sophisticated than those in the private sector. The government needs an alternate model of working for its policy and strategy executives – how to move, as it were from Whitehall to 'Blackhall'.

Since the late 1990s the public sector has focused on communicating through tightly controlled press offices. This is a rational strategy when you face only 100 or so serious news organisations. But this will not work when every citizen and public sector worker can broadcast globally by publishing to the web. There are too many outlets for a press office to keep up with. As the Power of Information <sup>[554]</sup> work set out, organisations have to broaden their communication base to include the workforce taking part in online discussions in their specialism. After 15 years of constricting communications this is a challenge for the public sector especially in the harsh political comms environment.

Citizens are also taking control of public sector information and repurposing it in a process known as data mashing. Clever coders are getting better and better at bringing meaning and clarity to vast quantities of incomprehensible information. Stand out examples include Schoolmap.org.uk <sup>[568]</sup> and MySociety's Theyworkforyou.com <sup>[569]</sup>. Political leaders' interest in what was an obscure geeky area has been redoubled after the expenses scandal, where very large quantities of previously unpublished data were unexpectedly made public and analysed by journalists. Changes to Freedom of Information and the 30-year rule as well as 21st Century interfaces such as Whatdotheyknow.com <sup>[570]</sup> will bring more and more data out for analysis. The 2011

Census will even have its own API. Data mashing and the new semantic technologies will create far more transparency and analysis by machines for non statistical people.

Widespread data mashing will be a step change in transparency. The public sector needs to engage with people who might mashup its data and be prepared to respond to unexpected outcomes. In America Obama has seized the agenda with [data.gov](#) <sup>[571]</sup> and in the UK, the Cabinet Office has brought in [Sir Tim Berners-Lee](#) <sup>[572]</sup> to advise on opening up government data. But both countries face a huge challenge to bring data mashing to the entirety of the public sector.

Understanding the direction of travel is a good start; moving in that direction may take a little longer.

## What this means for managers

EUAN SEMPLE, social computing blogger and consultant

With the arrival of Facebook, Myspace and Bebo, along with the more apparently work friendly LinkedIn and Xing, social networking has appeared on the business horizon and is causing quite a stir. What should organisations and their managers do about these sites? Should they ban them or encourage their use? Which sites should they use? Are their staff going to become more productive through embracing these tools or waste even more time than they do now?

Business people are often jumpy even about the use of the word 'social' in a business context. Many of us still feel that work has to be painful to be taken seriously. We still have a mindset, established in the early industrial era, that work is about transactions, repeatable processes, cogs in the machine. There has even been a degree of suspicion of networks, with networking conjuring up thoughts of nepotism.

And yet businesses employ people; people need to trust each other to work together and get things done; and their willingness to trust each other depends in large part on being social with each other. Rubbing shoulders, passing the time of day, passing on stories, these are all ways that we learn about each other, what makes us tick, and what shared values we have. Creating environments where this can happen more readily helps oil the wheels of business and enable staff to get things done.

And informal networks have always been a major, if previously hidden, part of the world of work and there has always been a tension between the org chart and the 'real' organisations most of us inhabit. If you consider a network as a collection of people willing to help each other and work together to achieve things then they become more apparently indispensable to business. A network can alert you to things you need to know, and let you call on the help of others when dealing with an opportunity or a problem. You can also pass on what works after the event helping others and keeping the value of the network going.

The range of organisations realising these potential benefits is growing daily and my clients now include banks, insurance companies, governments and global commercial organisations.

As more and more people experience the connected online world they are realising that virtual networks can be as useful as 'real' ones and the more people they are connected to through those virtual networks the easier it is to get things done. In addition the virtual networks don't exist in isolation as they also help build relationships in the real world. One of the biggest challenges in any large business is knowing what people are doing and where to find the right people to talk to about any particular challenge or issue. As a client said to me recently it is easier to find other people in her own company on LinkedIn than it is on any of the more formal business systems they have.

The biggest benefits of these networks comes with scale. At the BBC there were eventually 23,000 users of our online forum and this meant that pretty much whatever you wanted to find out about someone would have done it before or might know someone who had. Once you start finding people chasing the same problems as you you start to form relationships and the levels of trust increase. Having tools that allow users to create sub-groups of the whole environment helps people to move from one space to another to have different types of conversations.

When we started building our combination of forums, blogs and wikis at the BBC we were consciously trying to build the online equivalent of a collection of Cotswold villages. There is a mix of architectural styles and very different buildings with lots of footpaths between them. You know where the pub and church are, you're comfortable in the environment and are happy to stop and chat on street corners with people you know. Most corporate intranets tend to be more like Milton Keynes. On the surface they're efficient with lots of straight lines and signposting, but you get lost because everything looks the same and there is little inclination to spend time with passers by!

And this is where the different characteristics of these tools come into play. In many ways they mimic physical spaces: we make judgements when we arrive about what the space is for, what the other people there are like, what we might use it for and whether our time there will be productive. Facebook and Bebo create a different impression, and a different type of conversation, from tools like LinkedIn and Xing which project a business-like image and have appealed to those whose experience of social tools is mainly through work.

The most important factor in businesses getting the most out of online tools is how they engage with them. Language begins to matter in these environments and the word "manage" isn't really appropriate. Often the manager isn't in control, even if the tools are the organisations own, and the more they try to control things the less well people respond and there is a real risk that users disengage.

This doesn't, however, mean that these spaces are unmanageable or that managers don't share the potential vastly increased influence. If they are prepared to see themselves as yet another node in the network with their own perspectives and experience and be willing to express those, then they will discover that these networks are just as much for them as for everyone else. Being able to express the importance of

business issues and seek support in solving problems are of as much interest to them as to everyone else. Even discussing in the tools themselves why those tools might represent a business risk can be very effective!

Whichever tool you deploy, or whichever tool staff engage in, you really need to be in there with them. Talking with them about what they are doing, why they are doing it, how they might do it better and how you all collectively might benefit.

The biggest risk is not to get involved. Arguably ignoring these tools isn't an option given the numbers of staff already involved. Equally, banning them is problematic as the risk then is that you just push the online conversations elsewhere and have even less ability to influence them. So getting your hands dirty, getting involved and learning the ropes seems the best, if not the only, option.

So start working out where people are spending time online, watch them and learn from them. See who is most effective at using the tools and how they use them. Get in there and learn the ropes and then either work to ensure that the best possible is achieved in the environment they are already using or discuss the need to move and adopt newer better tools.

There will be lots of managers moved to engage with these online environments either to deal with the perceived risk or just the desire to look cool. In order not to wade in and get things horribly wrong you'd better get playing and learning as soon as you can!

## What this means for charities

STEVE BRIDGER, Buzz Director

One of the greatest benefits of digital technology has been the empowerment of individuals, and how these voices can be amplified. New online tools now make it easier for people to mobilise their social networks around peer-to-peer lending and personal fundraising campaigns – sometimes without charities even knowing about it. Significantly, in late 2007, social networking websites overtook webmail services in terms of UK internet traffic (according to Hitwise). Twelve months later, this shift was reflected in the number of referrals to fundraising pages on [Justgiving](#) (which provides online tools to support the collection of donations), which itself reached another milestone in February 2009: since 2001 the total number of pages created has passed one million.

There are particular challenges for those charities heavily dependent on donations for the majority of their income, as digital technologies are less a channel for their outward communications, but are changing the power relationships between charities and donors. This is driven by 'a perfect storm' of behavioural changes by (although by no means exclusively) young people, and the accelerating turbulence generated by open and disruptive technologies.



Crucially, these new websites provide an architecture for participation, not just a new channel for more of the same. Neither is social media something that only happens online. It's a mesh of physical meet ups and online activities, such as [The Big Knit](#) where knitting communities across Britain together sent in over 400,000 'hats' for Innocent smoothies, raising more than £200,000 for Age Concern. Charities should allow people the space to be creative and take the action they want on websites, blogs and social networks that they already visit every day to get the things they need from each other, and to get stuff done. This is a permanent shift, regardless of how the individual technology pieces change.

An initiative like [Twestival](#) demonstrated the enormous accelerating potential of self-organising social networks, raising hundreds of thousands of dollars in a few weeks, without the prior endorsement of the recipient charity (in this case charity: water). This is real engagement: when people do things for the cause you didn't ask them to do (although you cannot always 'vet' who wants to become your friend).

But social media is not a spectator sport (which is why I prefer to call it 'participatory media'). In order to stay relevant, charities must now develop strategies for participation, invest in relationships, and if necessary re-allocate resources away from top-heavy content creation (where much goes unread) to growing people into new roles, to pull together the voices of others and to create value by aggregating the thousands of small actions of distributed supporters and small groups. Greenpeace's [Green My Apple](#) campaign is a good example.

We need a new way of looking at charity and giving viewing it as an enriching personal experience and not simply a one-off or series of transactions. Charities should not take donors for granted, as many did in an analogue world, but embrace them as partners, allow them to have conversations about their appeals and how their money gets spent. Tools like Twitter now make this sort of intimacy more scalable making it possible for charities to treat every online donor like a major donor. A charity's brand will increasingly be the dialogue they have with their supporters in this way one person, one connection, one conversation at a time.

Charities now have an opportunity to embed themselves in people's lives and social situations (on social networks). Talk with individuals about what drives them and how these individual goals can be realised through the work of the charity. Engage donors by motivation and giving 'experiences' – engage then fundraise. The connections will be sustained through storytelling (using blogs and other social tools) and through dialogue. Donor loyalty is about you being loyal to your donors, not the other way around. Consider how some charities have found just the right tone, e.g. [The Dogs Trust](#) on Twitter (and elsewhere). The tail now wags the dog.

Donors of the future will demand action and accountability (while allowing some wriggle room to experiment), not take it on good faith that a charity will eventually get there in incremental steps. It will be messy, but there are huge rewards for those charities that embrace this paradigm shift. People will become increasingly suspicious of those charities that do not participate, and will ask themselves whether they have something

to hide – although those that innovate will earn new respect.

We urgently need a new vocabulary, as increasingly, so-called ‘beneficiaries’ will co-create the solution to their own problems. The exact nature of this new relationship with ‘beneficiaries’ or ‘service users’ is something charities are still getting comfortable with, and will cause many some discomfort.

Most successful charities will take a step back and focus on relationships, not processes and the overbearing structure of the charity brand, and create a truly donor-centred infrastructure. This may mean a return to small, dynamic project teams, which will embrace free agent fundraisers as partners, and not simply tolerate them.

There will continue to see an erosion in the ‘general fund’ most charities hold sacred, and in its place, different methods for earmarked funds. The significant upside to this trend will see greater use of blogs to demonstrate and communicate impact, so that donors can see how their contribution makes a difference. [Médecins Sans Frontières](#) Canada as demonstrated the power of blogs. Meanwhile digital cameras and cheap point-and-shoot video have the potential to show beneficiaries as real people. In January 2009, Kiva Fellow (volunteer) posted [a viral video](#) which followed the ‘journey’ of a loan from London to Cambodia.

Charities are being stressed to the limit by the economic downturn, but also by some more profound changes that I believe will have some far reaching consequences for a business model not seriously questioned for one hundred and fifty years. The fact is, even a decade ago, charities used to be an automatic choice for people wishing to make a difference, but they have now become just another player, albeit with still considerable visibility. Blend the old with the new social media is offline, too. For example, Apple create social retail experiences when their tribe gather in their larger stores. Imagine a similar scenario as tired charity shops get re-born as dynamic hubs for community activism.

In January 2009, the Royal National Institute for the Deaf (RNID) published its annual report online. It weaves together compelling stories of its impact through a vivid mix of video, blogs and tags to drill deeper into content. While this is a significant step for a large charity to take, but size no longer matters so much as being able to demonstrate impact. New global, web-enabled charities, like US-based charity: water answer to the call “don’t tell me, show me”, and stream video of new wells being drilled in real time on their homepage, turning its work into a never-ending story. I see growing evidence that many of the new charities being born are leaner, more agile and more distributed than many of their predecessors.

Those that will succeed in the future will be those that grasp the true impact of these words by Katya Andresen: *“the message is not about the charity, but about why the messenger cares.”*

## What this means for membership

# organisations

KATHERINE HUDSON, The Future of Membership

The apparent threat (or opportunity) that social technology presents to membership organisations is summed up in the subtitle to Clay Shirky's zeitgeisty book *Here Comes Everybody: The Power of organizing without organizations*. If 'everybody' can organise action by themselves (or rather, together), what possible reason is there for organisations to exist?

The first answer is, of course, that 'everybody' is not coming quite yet. Older people in particular – precisely those who, demographically, make up much of the membership of current membership organisations – are not all on [Twitter](#) and [Facebook](#). Many do not even use [e-mail](#). So any use of [social media](#) tools by a membership organisation has to be careful to avoid alienating existing subscribers used to more traditional forms of engagement. Many members still like receiving a journal or newsletter in the post, four times a year, and arguing it all out once a year at the AGM. Increasingly though, this will not be an option: this cross-section of the membership will sadly die out – perhaps literally – and be replaced with a more demanding community. Organisations need to anticipate and adapt to the needs of not just an increasingly technically literate membership, but also of members who are used to belonging to many communities, many of which are self-organised, digital and completely free.

Membership organisations have traditionally offered a repository of specialist information, advisory services, networking opportunities, meeting places, and lobbying on behalf of their members. Many of these services can now be done voluntarily by individuals who set up their own platforms using tools like [Ning](#). What can membership organisations offer to people who can instead use social tools to find out about causes or interests (such as through Google), share information and campaign ([Twitter](#), [blogging](#), [Number 10 petitions](#)), find other people who share their interests ([Facebook](#), [LinkedIn](#), [School of Everything](#)), organise offline meetings ([Meetup](#), [Eventbrite](#)) and even disseminate what happens there ([Flickr](#), [YouTube](#))? Of course there is still a value in bringing people together and providing a common cause. While the barriers to entry for setting these up have lessened, they have not disappeared altogether: it still takes time, effort and, in the case of Meetup, nominal amounts of money, to get people together behind a cause or to find and bring together people with a shared interest. But it is a *lot* easier than it used to be.

So the second answer is that membership organisations have to do more than just organise. Indeed, to really add value they need to shift the emphasis from organisation to membership.

Membership organisations are a broad church, from charities that use membership to support their work, financially and/or through advocacy and volunteering, to trade associations, trade unions, political parties... Likewise, 'membership' can be whatever an organisation chooses: anything from signing up to a mailing list, to full voting rights

and the ability to elect, fill and remove the governing structure. But membership can also be whatever the members choose, too. The response to the flurry of [Facebook groups](#) 'supporting' your membership organisation hints not at a dilution of your message, but instead at the desire of social media users to present a strong personal identity through association. This is an opportunity that can be embraced. But it requires bravery: it is becoming increasingly difficult to 'own' your organisation's message.

Increasingly, members who can have a personal engagement as consumers (to use [Tapscott's](#) phrase, 'prosumers') will escalate the demands they make of membership organisations. It is vital, therefore, to genuinely engage members in any change or action and to do so *from the outset*. This will be co-ownership in the true sense: members will be unwilling to act on your behalf, but they will happily act for an organisation in which they play a real and governing part. Members are not stupid, and they usually have other options: pay them only lip service and they will walk. Co-ownership is also the most effective way to reach your desired outcomes: on aggregate, your members probably know more about most things than you, and they certainly know more about what they like and what technologies they already use. There's no need to spend a fortune on websites if all your members are already on Facebook or Ning, or to pay for extensive consultancy support when your membership can help for free.

The third answer is to organise things that members simply cannot create for themselves, namely, brokering connections with people they might find it difficult to meet (people they don't know, those that aren't online and, crucially, staff within your organisation) or making that connection easier (facilitating and 'hosting') and offering experiences they can't access by themselves (as a member of the public, I can't organise a private view at a gallery. That's worth paying for). The bar to entry may have been lowered, but there are still things that individuals find hard to do, and membership organisations need to find these new opportunities and fill them. And that's the odd answer to all responses to social technologies – it keeps coming back to quality human relationships. It isn't really about technology at all.

## What this means for public services

DOMINIC CAMPBELL, Enabled by Design

We are in the midst of a significant shift in the way we think about and relate to public services. Led both from inside government by the Prime Minister himself as well as more disruptive social, economic and technological change outside government, traditional delivery models and provider-client relationships are being challenged as never before. Driven in no small part by developments in the web, the speed and scale of change is happening on an unprecedented scale and leading us to question the notion of public services in our new, hyper-networked world.

Change is being driven from the top down, with [Gordon Brown recognising](#) <sup>[573]</sup> the need to involve and empower citizens as the means to deliver truly world-class public

services. Central to this agenda are the government's values of choice, voice, transparency and openness.

But for many the speed and scale of this change is not enough and outside of government change is taking a very different form. Change is emerging from the bottom up, with citizens coming together around shared needs and interests and self-organising to resolve the challenges they face together.

Taking advantage of freely available and easy to use collaborative tools such as [blogs](#), [wikis](#) and [social networks](#), communities of interest (whether by geography or common cause) are coming together to take on what may have previously been seen as the role of the government in public service delivery, or otherwise acting to publicly hold the government to account on its service delivering.

Whether in the form of peer-to-peer learning through the [School of Everything](#), community recycling services such as [Freecycle](#), or in local groups such as [Haringey Online](#), new forms of public service institution are emerging on an almost daily basis, all built on free and easy-to-use web tools such as [Ning](#), [Drupal](#) or [Google groups](#).

We're moving from e-gov to we-gov: new ways of creating user-led service design are emerging all the time, enabling public services to engage and involve clients in real and meaningful re-shaping of services. Enabled by the power of the web, public services are beginning to be rebuilt from the bottom up, formed around real rather than perceived need and with people speaking for themselves in their own words and through their own experiences and passions.

Take the case of [Enabled by Design](#) <sup>[574]</sup> - driven by a specific identified need by my young and trendy business partner Denise, who just happens to have MS and needs to lean on the state for some assistive equipment. In response, Denise is creating an entirely new form of public service institution, bringing users of equipment together online to challenge the current model of service provision (take what you're given) and working together with designers and others to challenge the current status quo, self-organising a community into action to improve the look, feel and usefulness of equipment to meet the needs of expert users.

Organisational boundaries are blurring, public services are becoming more transparent and accountable as information and experiences within government are shared on a wide scale, creating more porous institutions enabled by the real stories of life in those organisations. Traditional hierarchies and structures are being bent and broken by the emergence of a patchwork quilt of e-enabled public services, some within the state but many not.

In this new world, the role of government in the provision of public services is being fundamentally challenged. Increasingly, the state is being seen as a facilitator, cheerleader and champion, rather than commander-in-chief; government as a convenor of interests, just one (albeit important) player in a patchwork quilt of public service delivery. It is increasingly accepted that no government can have all the answers nor be best placed to tackle the issues at hand, and now is the time for the government to be

brave and begin to relinquish a degree of control to civil society, supporting it to make best use of its own energies and skills to overcome the challenges it faces.

Going forward, the government needs to learn from and work with these nimble micro public service uninstitutions that are redefining public services as we've come to know them. It needs to learn to listen, to work collaboratively, to mimic the behaviours of these successful social communities and work with the people it is there to serve - these small, agile and low-cost networks of passionate, creative and knowledgeable public service users. The web provides limitless possibility in every direction and it is now up to the government to work out how best to shape and support 'public services 2.0' – and define its own role within it.

## What this means for social entrepreneurs

NICK TEMPLE, School for Social Entrepreneurs

While entrepreneurs in the business sector identify untapped commercial markets, and gather together the resources to break into those markets for profit, social entrepreneurs use the same skills to different effect. For social entrepreneurs, untapped markets are people or communities in need, who haven't been reached by other initiatives. But while they may read from a different (triple) bottom line, social and business entrepreneurs have a lot in common. They build something out of nothing. They are ambitious to achieve. They marshal resources to meet their needs. They are constantly creative. And they are not afraid to make mistakes.

The marshalling of resources is particularly important in this context, as start-up and fledgling social entrepreneurs often have little spare money (or money at all) for key parts of their work, namely marketing, promotions, communications, fundraising, events organisation, and community-outreach. This is where the development of web 2.0 [2]-type tools is playing such a significant role; where two or three years ago, we would get the question "do you know someone cheap who designs good websites?", the questions now tend to be "what's a blog and how do I start one?" or "should I pay for this or is the free version OK?". The costs of podcasting [2], blogging [2], uploading [2] video, starting an online network, promoting your project on Facebook [140] or specialised networks like UnLtdWorld [575], fundraising online and so on, have fallen so far as to completely democratise it: for social entrepreneurs now, the big question is no longer "what can we afford?" but "what should we use?" and "how do you use it best?" In some cases, SSE Fellows (like Nathalie McDermott of OnRoadMedia or Jude Habib of SoundDelivery) take this a step further and make it their mission to empower communities and other organisations to speak up or achieve more using new technologies.

At the School for Social Entrepreneurs, our message to them is a simple one: work out what you want to achieve and then work out whether technology can play a part in helping do it. It can be all too tempting amidst a rash of "Twitter is the cure to all ills" headlines to leap in, waste time and lose focus. But if building a community of



like-minded people who support and engage with their idea is important to moving it forward (and if those people can be found online), then fire away using [Facebook groups](#) <sup>[140]</sup>, [Twitter](#) <sup>[140]</sup>, [blogs](#) <sup>[2]</sup> and whatever is most appropriate. Such tools are often a cost-effective means to an important end: building a following around an idea or a new enterprise. Tools such as blogs and Twitter also allow for a more direct form of communication that, when done with consistency and authenticity, will better engage and inform that following. That builds trust, credibility and loyalty to an organisation in the medium to long term.

What is particularly interesting for social entrepreneurs in this space is that tools like Twitter and Facebook have blurred the line between the personal and the organisational, between the life and the work. But this is already the case for social entrepreneurs in many cases, and so fits naturally with the way they are and the way they operate. Alongside the fact that networking is key to their success (particularly when they can feel isolated and disillusioned on their journey), it's clear why such tools can be not only useful organisationally (for communications, community-building etc) but also individually (to make contacts, build relationships, find support, bookmark sites of interest etc).

However, whilst I don't wish to end in Luddite fashion, it's important that we also remember that many social entrepreneurs work in real, geographical communities that can't be reached online; that e-mail remains the primary communication tool for the vast majority; that 'slacktivism' will tend to reinforce the idea that people can solve problems with a click of a mouse (and keep a healthy distance from all that nasty poverty and disadvantage); that online approaches need to be measured for their social impact if resources are put into them that could go elsewhere; that Facebook status updates aren't a substitute for meeting people face-to-face; and that doing things is more important than talking about doing things.

Ultimately, these new tools provide amazing opportunities and resources to facilitate change, to network effectively, to communicate directly, to fundraise innovatively, and to build communities swiftly. But in all but a very small minority of cases for social entrepreneurs, they are means to an end, not the end in themselves.

## What this means for campaigners

ANDY GIBSON, Head Gardener, Mindapples.org

If you have something to say, it has never been easier to shout about it. As this handbook outlines, there are now so many platforms to communicate your message - [blogs](#) <sup>[2]</sup>, [Twitter](#) <sup>[140]</sup>, [Facebook](#) <sup>[140]</sup>, [MySpace](#) <sup>[140]</sup>, [YouTube](#) <sup>[140]</sup>, [Flickr](#) <sup>[140]</sup>, [Pledgebank](#) <sup>[140]</sup>, [Social Actions](#) <sup>[140]</sup> - that anyone can promote their cause to the world. In fact, the BBC closed its Action Network in 2008 <sup>[576]</sup> principally because activists didn't need any more technologies to campaign and organise around issues.

Good campaigners don't care about the software, only about the size of the audience.

As Simon Berry showed with [ColaLife](#), <sup>[22]</sup> there are a lot of people out there willing to support a strong campaign with a clear message, as long as they get to hear about it. An individual or a small group of volunteers now has a reach comparable to a large campaigning charity of twenty years ago, and for organisations with richer resources the possibilities are huge.

So in some ways campaigners have never had it so good. However, as it becomes easier to talk, it also becomes harder to make yourself heard above the din. The days of throwing money at a campaign and watching the mass media 'push' your cause to the world are increasingly distant. If people like what you are saying, they will pledge support, take action, and even promote it for you; but if you aren't talking their language, they will increasingly screen you out and focus on something more appealing.



Campaigners are in a strong position to be heard in this noisy new world: they have something important to say, and they have genuine passion for what they do. The task of the modern campaigner is to convert these two qualities into attention, by speaking honestly, telling relevant human stories and constructing the campaign in a way that lets people contribute.

Be promiscuous: go where people are and invite them to contribute in whatever ways they want. For example, the main [Mindapples.org](#) <sup>[577]</sup> site lets people share the five things they do regularly to care for their minds, and browse other people's answers. But on [Twitter](#) <sup>[578]</sup> people can share what they're doing right now; on [Flickr](#) <sup>[579]</sup> they can share photos which make them feel happy; people can even tag mentally nurturing songs on [Last.fm](#) <sup>[580]</sup>, and make [YouTube](#) <sup>[581]</sup> videos – all by tagging them 'mindapples'. We even invite companies to use the Mindapples test to start conversations with their staff about stress and wellbeing, and encourage interested people to take the concept and use it in their workshops, marketing and training programmes. However people choose to engage, we respect their contributions, and how they choose to communicate. It's about giving people many ways to add their personal stories to our cause.



To communicate successfully in this new environment though, the nature of the message has to change. Firstly, it needs to be strong enough that it can be retold through the 'chinese whispers' of conversations without losing its efficacy. Secondly, it needs to be positive: it is much harder to attract attention if your cause is unpalatable or difficult to explain. Social media campaigning favours simple messages that people want to hear, not complex uncomfortable truths. Instant gratification gets people's attention. Worthy messages about what we must do don't cut it with today's overwhelmed audiences.

This doesn't mean that difficult or unfashionable issues can't be tackled effectively through this medium – but it does mean we have to think harder about how to do so. Rather than making an argument and battering audiences into submission, look to start conversations about what people want, and then give them simple things to do about it. It's not about changing minds any more; it's about asking the right questions, rallying a community, telling the stories, and supporting people to change their own world.

Clay Shirky said of the recent student campaign against HSBC's overdraft charges <sup>[582]</sup> that the key enabler that the social web provides is to let the person *who has figured out what to do* share this information with the world, to allow others to copy them. It wasn't the press attention or the size of the Facebook group <sup>[583]</sup> that made the difference: it was the person who posted details of how to switch to Barclays. Social technologies enable previously disconnected groups of people to act collectively in mutual interest to change things themselves, without the need to lobby for change.

Campaigning has become the art of creating – and leading – social movements. Senator Bill Bradley (quoted in Seth Godin's Tribes) defines a movement as having three components: a story of the future we are trying to build; a connection between and amongst the leaders and members of the movement; and something to do. Technology takes care of the middle bit: the rest is up to you.

So rather than telling people what to do, share what you have done and invite others to join in. Find a shared vision of the world we want to live in and give us simple ways to create it together. Because with the instantaneous, global reach of modern technologies, whoever can find the right questions to ask, the right small actions to encourage, can make a real difference.

## What this means for all of us

AMY SAMPLE WARD, NetSquared

I'm really excited, every day, by the new and successful stories I hear about non-profit organisations reaching out to the global community via the internet and new technologies to help spread their messages, provide their services more effectively and efficiently, find new supporters and donors and empowering others to support and fundraise on their behalf. The web is an incredible place to work and a fascinating thing to watch grow.

But even more exciting than that is watching individuals leverage the same tools as corporate giants and make a positive change on the world. That's the best part of social media: it is an equaliser of sorts. It provides much the same opportunities to everyone, whether you are that corporate giant or a teenager with an idea. No matter who you are or where you live (obviously, granted you need internet access), you can use the same tools as anyone else to harness the collective energy of others around the world who hear your call, believe in your mission, and think you've got a pretty great idea about helping out.

Social change projects may take the shape of a traditional or recognised non-profit organisation or an individual with an idea, a venture capitalist or a marketer, a team of developers or a college kid who wants to make an impact. These social change projects rely on communities coming together to succeed (whether they are identified by a shared geography, issue, cause, or personal characteristic) in making a real difference in our world. Social media tools allow people to come together online in new ways and across barriers. The tools are only useful, engaging, and successful when used as part of a community (how fun is it to use Facebook without any friends?). Thus, tools that create community are great for communities making change.

The options for individuals for how or where communication takes place are more flexible than that of an organisation. In fact, Clay Shirky has argued that structureless collections of individuals are more effective at mobilising for change than structured companies: agility is everything. But does that have to be the case? And what are the implications for organisations?

## **Where's the line?**

Where do the actions and opportunities of individuals end and those of organisations begin? Do those actions and opportunities criss cross, or parallel, intersect or intermingle? What about the actions of an individual at home versus at work for his or her organisation?

Many organisations asked questions about the degree of individual representation that can be tolerated on behalf of those using social media for an organisation during the US elections, as people posted messages to Twitter or joined groups on Facebook in support of a candidate or issue. People in cities around the world list their organisation and staff position on social networks and other online profiles, next to photos from parties, protests, or religious affiliations.

The answers to these questions are being tried and tested right now, developing more and more every day. No organisation can exist much longer without a social media policy at work, providing at least some directives on what can and cannot be said or done, joined or favoured, online by individuals for or on behalf of the group.

## **What are the risks?**

It's not just organisations that are changing. New technologies are changing the way we

interact as individuals, and how we design, organise and document our lives. Gavin O'Carroll runs the Digital Health Service, a London-based consultancy which helps organisations get the best from their relationship with technology and monitors the well-being, positive or negative, in our relationship to the digital. He writes:

*"Life is short, we don't have any more time or energy than we did. For you and me, it's not about more, it's about more appropriate, more aligned to our passions, goals, beliefs".*

"Information overload is pushing us to ask what work, projects, organisations, movements, communities, people we should give our energy and attention to. Add to that exposure to low-value interruption (email, blackberry, iphones, always-on connectivity) which kills present-moment awareness and deep states of focus, leading to a slow burn of frustration, loss of confidence in your quality of work and – so people say – to depression. These then, are the risks".

"It's exciting to be able to engage with all these great people, these great projects and communities, but how do you make sure that your engagement is focused, not just superficial. How do you make sure you are not just an opportunity addict, making no real impact, getting no real satisfaction and being drained of energy in the process? How is our engagement with digital technology helping us become even more human?"

"For individuals, raising the quality and discipline of our interaction with digital technologies is crucial, and for social movements, respecting how people choose to engage, or not to engage becomes even more important".

## **What's next?**

Many organisations are already taking the next step to collaborate with individuals online. Now that we all have the power to get engaged, create communities, collaborate on projects, participate in challenges and all the other opportunities for igniting innovation online, organisations are also able to tap some of those individuals in new ways. Namely, providing individuals who are actively promoting similar services or issues (or have already started championing the organisation on their own) with what they need (be it logos and messages, or just feedback and encouragement) to keep doing what they are already doing.

More and more opportunities appear every day for individuals to really become champions for organisations and causes in a dynamic way. As organisations become more open to using and then actually create social media strategies, it's important that they highlight these individuals, support them, and thank them(!) for their passions and contributions.

A volunteer who comes to the office every Friday to help with general operating support is something most organisations can understand and have probably experienced. It's a new world to imagine a volunteer who, usually without even contacting the organisation, spends time every week telling people about your work, why they should care, and how they can help. Tapping that passion and energy is important and providing those

volunteers with the simple supports they need to more effectively support the organisation is invaluable.

The power is truly in collaboration, and the future is in making change together.

## A word from the authors

### NESTA: The Lab Commissioner

To encourage greater innovation, NESTA was a founding sponsor of the Catalyst Awards, community awards for social technology, which aim to raise the profile of communications technologies and recognise the pioneers. NESTA has also helped develop the capacity to bring communities of change agents and technology developers together to accelerate new combinations of ideas through groups like Social Innovation Camp.



The Lab was motivated to commission this handbook to build on the practical experience from the Catalyst Awards and Social Innovation Camp. We wanted to identify the lessons of how new technologies can be most effectively applied to deliver positive social impact and help transform the way public services work.

By packaging these lessons in an inspirational and practically useful way we hope to **release the untapped potential for people** to use technology to tackle social and environmental challenges. This handbook aims to involve new people, help those already in this space go further and keep this potential developing into more and more practical examples that have a positive impact.

### Andy Gibson Editor and Author

In the words of Dr Egon Spengler in Ghostbusters, “print is dead”.

The instant we commit our words to bound paper and permanent ink, they become static, lose their currency, and remain part of the past. Which is precisely why print still matters. For a few years now I’ve been fortunate to be part of some very interesting conversations about how innovation in technology might reshape our society. I’ve seen huge progress in our collective thinking about how these technologies can help enrich our world and improve



our lives, rather than simply giving us even more ways to distract ourselves from our troubles.

I believe **it is time for the conversation to move on**. We have talked for a long time about how these new ways of communicating will change our organisations, our society, our lives; and we've arrived at a few answers, and lots more pressing questions. But now is the time to act, to test them out in the real world on a much wider scale. By binding up our 'progress so far' into the time capsule of this handbook, I hope we can put to rest some of the old conversations and create a space for some new ones. Perhaps the propositions <sup>[23]</sup> we outline here will form the basis for these new conversations, perhaps even a few arguments. Perhaps not. But if we can bring some new people into the conversation and support them in putting these theories into practice, then I think we can make progress collectively, and in unexpected directions, as these new experiments unfold.

Most of the content of this book will eventually become out of date. Some of it was probably wrong already. After all, it's just a best guess by a group of people who have at most a fraction of the total knowledge in this field. And that's fine. What's important is that it moves things forward. As 37 Signals say in Getting Real <sup>[584]</sup> *"Accept that decisions are temporary. Accept that mistakes will happen and realize it's no big deal as long as you can correct them quickly. Execute, build momentum, and move on."*

And never, ever cross the streams.

## **Nigel Courtney** **Author**

The emergence of freely or cheaply available digital and web-based technologies is enabling ordinary people to have our say to change the way we think, learn and act, to influence others, to find new ways of making a living.

Individuals have led the change but organisations are also seeing the potential and commissioning systems to help them achieve their goals in socially useful ways. But **there is still much to learn** about using these technologies effectively.

This handbook owes much to the pioneers who have been willing to share their experiences of applying these new tools in a wide range of settings, and in a variety of combinations, to catalyse change by means of social networks or campaigning or citizen empowerment. We hope their candour will help you avoid pitfalls and achieve your own aims.



## **Amy Sample Ward** **Author**

The social web is here.



With it come the tools and opportunities for non-profit organisations, groups, and even individuals to leverage the power of the global community online. Organisations can now find and connect with supporters in more dynamic ways, both influencers and champions. Individuals can be influencers and champions for charities and causes of their choice, providing benefits at no cost to those organisations or groups. So, what are we waiting for?



We're waiting to know what to do, how to do it, or if it will really work. We're waiting to see who will try it first and whether they will make money, make friends, or make a new tool. We're waiting for an invitation to dive in.

Well, here's that invitation. Here's the beginning of the conversation for you, so you know the words or the tools to talk about and think about with your organisation, your neighbours, and your friends. This is as formal an invitation as it will be – please RSVP 'yes'.

Those of us who collaborated on this handbook are waiting for you to join us in the ongoing conversation that has already started and will continue. We're looking at what's working, what isn't working, and what you can do right now to get started. We're looking at data and figures, as well as feedback and stories. We write about our thoughts, our observations, and our strategies. And we'll share all of it with you, online, for free.

**Take this handbook as the beginning of the conversation.** We look forward to continuing the conversation with you online about using these social tools for more effective, efficient, and powerful social benefit. There's no time like now to get started. Talk to you soon!

## **David Wilcox** **Author**

In contributing to this handbook I've been inspired by the NESTA vision that innovation develops best when it is open, diverse and collaborative. Social media offers us all the chance to join in, with a little money, some skills, and – most importantly, the right mindset and guiding principles.



Cluetrain Manifesto <sup>[4]</sup> co-author Doc Searls once said that markets are conversations, relationships and transactions – obvious to anyone who shops in the bazaar as well as the supermarket. You do business or share with people you trust, and to trust people you need to get to know them, and to do that you need to talk to them. Somehow in the last century that understanding got lost in the increasingly impersonal way in which large organisations broadcast to us, advertised at us, and tried to sell us one-size-fits-all products and services.

As this mindset begins to change, with it comes a reminder to think about who and why, before jumping to the what and how of shiny new tools. That was always the case in good design. Get close to the users, and involve them in development. And we should also remember that the best way to learn something practical is to try it. As Ken Thompson said when I interviewed him, you can't learn to fly just by watching the instructor.

There's nothing really new in thinking about how to use social technology for public services and social change... except that **something has fundamentally changed**. The consumers of products and services can talk to each other about their preferences and complaints, not just in the bounded space of a local marketplace or meeting place, but globally. And if they don't get satisfaction, they can campaign and organise to develop something they do like.

We hope the propositions and explanations here will promote conversations and a willingness to get in some flying practice. The good news is that it can be fun... because social technology is first social, second technical. If you do get involved, you'll meet some interesting and friendly people, and develop some new relationships. What you then transact is up to you.

## Professor Clive Holtham Project Director

In 1909, at only 35 years of age, Guglielmo Marconi was awarded the Nobel prize for Physics. It had been eight years since Marconi achieved the first transatlantic wireless communications. In the Nobel Prize presentation speech, Professor Hildebrand concluded: "Where this development can lead, we know not... we can produce connections between far-distant places, over far-reaching waters and deserts."



In fact by 1909 most of the fundamental communication technologies for the 20th century had already been invented, leaving TV, the digital computer and the internet as the main but still awaited inventions. But **to invent something is not enough**. It has to be put to practical use, and key new technologies of 1909 (moving pictures, wireless, the aeroplane) still awaited commercial exploitation.

So it is too in 2009. Despite this being the 40th anniversary of the invention of the internet, and despite massive investment and interest in digital communications, we still can expect vast progress yet to come in communications technologies. In particular, the spread of high speed fibre-optic cables to the home is likely to spark a repeat of 'where this development can lead, we know not...'

It is therefore timely for NESTA to commission a review of the implications of current communications technologies for social change. For most of the 20th century, the



dominant dimension of communications has been mass communications, particularly through the media. In parallel was the growth of two-way personal and business telephony. The technologies of 2009 highlight the possibilities of the user as both recipient and originator of communication, within a corporate or a local context.

A problem for us in this project from the very first day was where to draw the line about technologies to include. It was important not to be limited purely to the fashionable tools of social networking technology, or even those which are mediated through the internet. These latter are perhaps inevitably the primary focus of the report, but we have also included references to projects which use other digital technologies.

## About Social by Social

The story behind the handbook, how it was made, and what we've learned

by **AMY SAMPLE WARD** and **ANDY GIBSON**

## About this book

*Social by Social* is a practical guide to using new technologies to create social impact. It makes accessible the tools you need to engage a community, offer services, scale up activities and sustain projects. Whoever you are, it shows you how to take technology and turn it into real world benefits.

We want to help people in the public and third sectors do more good, by showing them the power of these technologies and how to access them. In the process, we hope we can also educate funders and policy workers about the huge shift of mindset and expectations needed to commission these projects successfully, to give the innovators more space to work.

Whether you're a **small charity** wanting cheap web tools to support your work, a **large organisation** seeking to engage more effectively with your community, a **civil servant** charged with making public services more efficient, or just a **concerned citizen** on a personal mission, we hope there's something here for you.

If you're coming to this for the first time, you may just want to read about successful projects or get a view of the direction we think things are moving. Others of you may just want to skip to the practical bits and use the resources and tools we've collected to help you through the tricky bits in your project. Or you might just want to put the book on your coffee table to impress your friends. Throughout though, we've tried to signpost related content that you might find relevant to you so wherever you start, we'll steer you in the



right direction.

*Social by Social* isn't a manual in the classic sense. This work is still pretty new and there isn't a simple model to follow. Instead, it asks you the questions which you will need to answer, shares some of the routes other people have tried, and offers signposts to help you find your way. And it invites you to join an ongoing conversation as we all find the way together.

We've chosen the 'old' technology of print to communicate with you because we wanted to reach people who aren't doing everything online already, and because we felt it was the most appropriate technology to meet our purpose: creating an educational resource and reference guide to new technologies. We've taken an innovative approach to printing and distributing the handbook by offering all the content for free online, in its entirety, via this commentable *Drupal website* and *Wordpress blog*. NESTA have printed some colour copies to give away, and you can buy a semi-colour version via digital print-on-demand, enabling us to sell the book around the world through printers in the UK, US and Belgium, without the need to stock copies. Design and editorial was by Sociability <sup>[273]</sup>, and print and publication by OpenMute <sup>[585]</sup>.

We hope you like it.

*Social by Social*

by Andy Gibson, Nigel Courtney, Amy Sample Ward, David Wilcox and Professor Clive Holtham

2009

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Commissioned by NESTA <sup>[587]</sup>



Designed by Sangeet Gyawali <sup>[588]</sup> and Sociability <sup>[589]</sup>

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# Why Social by Social?

There have been so many developments in communication technologies over the past few years, affecting so many aspects of our lives and working patterns, that giving shape and meaning to the chaos has become nearly impossible.

'Social by Social' is a term we've invented to make sense of what we're talking about.

The word 'social' is often used to imply all the various work that goes on in the public and third sector, and by individuals, to improve the world around us, care for each other, create value for communities and tackle the problems and inequalities of the world.

**(Social enterprise. Social conscience. Social problems.)**

And 'social' is also used by technologists and the media to refer to the new two-way communications technologies available via the internet and digital technologies. Communications which create society, strengthen relationships, support social interactions.

**(Social media. Social networks. Social infrastructure.)**

This book is a map of where these two words meet. It is not limited to the fashionable trends in social media and 'web 2.0'; nor is it specifically aimed at people in the social sector. It is about how these new tools for social interaction are changing our society, and how those of us with a social conscience can use them to do more good.

'Social by social' change is about using new technologies to bring people together to make their world better. This handbook is a starting point for working out how to do it.

## The creation of Social by Social

This handbook was commissioned by NESTA <sup>[591]</sup> in November 2008 and took almost nine months to research, write, edit, design and publish. The research time was mostly devoted to the case studies <sup>[592]</sup>, with most of the remaining materials coming from the resources and experience of the authors from previous projects. The Creative Commons <sup>[586]</sup> license (a first for NESTA) has also enabled us to bring in other voices and opinions and make use of the experience of the people we know as well as our own. The original brief gave us just 8 weeks to deliver the content, and although the deadline was (roughly) met, the handbook spent considerable time in editorial and production to give it polish and a single voice. In the end, the whole process was overseen by Andy, from concept to final creation, with various other freelancers and contributors chipping in along the way. The creative direction and design was done by Sociability <sup>[593]</sup>, and the online and print production was handled by Sociability and OpenMute <sup>[594]</sup>. The whole project was initiated and funded by NESTA.

## In the beginning...

We first started this project in October 2008, coming together as a collective in response to NESTA's original tender to produce a handbook to new technologies for social impact. With the exception of Clive and Nigel at CASS, none of us had ever worked directly together before.

In our original project proposal, we stated:

We wish to emphasise a fundamental dimension of our proposal. This is that the project itself will, at every stage, directly use the communications technologies that are being advocated for use in social change. There is one spine of the project that relates to use of a range of social technologies for both internal operation of the consortium, as well as for external engagement. This will also enable the working methods of the consortium itself to become a case study of innovation – this type of approach remains rare in consulting projects.

A second dimension is that it is both desirable and necessary to engage actively both with other practitioners in use of social technology, as well as those prospectively interested in using the eventual NESTA outputs. This engagement will take two forms. Firstly, the electronic media already touched upon. Secondly, during the duration of this project there are two physical events taking place. Not only will these be places for engagement face-to-face, it will be possible to use some of the methods in which the group are expert (including social reporting) to develop materials that can be directly used in the final handbook.

Thirdly, the project is not simply concerned with producing one draft free-standing document that is finally edited all together. With a consortium of five members, it is essential that the editorial task is continuous through the whole duration of the project.

When we set up a project wiki, it included the tag line: "Social by Social is a project in eating our own dog food while we help you get some of that dog food, too!" Yum. This idea of using the process of Social by Social's own operation as a case study, of 'eating our own dog food', carried its own risks. We would have to be willing to admit that some things worked less well than others for us. We might even (as did happen) have to admit to making mistakes. However, we felt that what we would go through would parallel almost exactly what other groups, whether they were ad hoc collaborations, cross department or organisation projects, or permanent social enterprises, would go through in setting up social technologies for the first time.

There is inevitably a shortage of case studies that are willing to address problems and failures, yet it is precisely these that first-time users of new technologies need to hear the most about. By engaging in the process ourselves, we were able to offer up a 'warts-and-all' case study of social by social in action. Sharing the real lessons learned, if you will.

## Technology

The group was, as a whole, pretty technology savvy – or at least that was the assumption. This assumption led to the **first major mistake**: not enough thorough evaluation of each participant's level of social media competency and experience. It is easy with a group of people interested in social media and technology tools to assume that everyone is on the same playing field, and conversations about skill levels can also be awkward amongst collaborators. The difficulty is that the field is growing exponentially faster and wider every day. Even coming from the same background or sector doesn't mean two people are familiar with, or have even heard of, the same tools. We have options now to do virtually the same thing via a multitude of tools; and decisions are being made by referral, Google search results, demographics, and even the look and feel of a site, not on whether it will do the task or not.

**What we did:** Selected a group of tools that sounded great on paper. We were thoughtful to include tools to cover all the stages of information gathering, sharing, and collaborating we would face, but we were not thoughtful about how those tools would be used by the team or how they would come together into a finished product. Because we picked the tools before diving into the project, we weren't addressing the audience first. This meant we ended up with tools that team members didn't know how to even begin using and were stuck feeling the pressure to figure it out without "messing up." This led to a great deal of internal push back and resistance to tool adoption. We ended up defaulting to e-mail quite quickly for two reasons: firstly, because everyone was definitely using it; and secondly because we trusted it to give us our own record of what had been said that we knew we could rely on. The project wiki <sup>[595]</sup> was useful for collating content together, but it became cumbersome and ineffective for editing the final document together: it was too text-focussed and wasn't useful for showing layout and graphics to the designer, and also it wasn't appropriate for delivering to the client at NESTA and inviting formal feedback and signoff. We ended up collating the final handbook in Microsoft Word and using e-mail and tracked changes – which worked very efficiently but broke our collaborative approach in favour of getting the job done.

**What you should do:** Choose tools based on what people are using already first, and introduce new tools only if you really need to. There are probably lots of subtle reasons you haven't thought of why people like the tools they use, so don't assume you know how to do it better. Survey all members of your team or community to find out what kinds of tools they have used before, which tools they use on their own and which for work, how they work most efficiently (do they prefer individual emails, shared workspaces or maybe RSS <sup>[2]</sup> for alerts?), and what things they feel the least experienced using (it's helpful here to include a range of tools and a scale of comfort/experience to guide people through). Once you hear from your team, you can begin selecting the tools that most apply to your team's experience and preferred working style and what kind of work you need to do. You can also take note of the kind of training that will be needed, whether it is a professional session or just a cheat-sheet you create (see below). And keep reviewing the appropriateness of tools and respecting people's needs to work in what they're most comfortable in; it's a constant trade-off between efficiency for

individuals and efficiency for the group.

## Skills

Most of our team had, at one time or another, worked online as part of a team, so there was always one person who felt comfortable with any given tool. This led to the **second major mistake**: when you are working as a team and needing to get things done, one person isn't enough. In some situations, having one 'expert' in your group is all you need, but in our situation, we all needed to jump into the same tools, jump into the same work, and get going quickly (since we only had 10 weeks to put the handbook together). This meant that having one person feel comfortable and the rest lost, wasn't going to get us very far. What made matters worse is that we don't work in an office together to turn around and ask a question. It was all virtual. But, this is very common with partnership and projects, and always the case when communicating with your community outside of the organisation.

**What we did:** We relied very heavily on one person among the five knowing the ins and outs of the tools. But we all needed to know how to use them. We also did not allot time or prepare for any training on the tools, since we were so confident in choosing the tools in the first place. This created a Catch-22: we didn't train the whole team, so the 'expert' would create information on how to use the tool and distribute it, but there wasn't an opportunity to review the training materials with the 'expert' and ask questions in real-time, so the 'expert' would refine training materials at different intervals based on intermittent feedback, and so on. The tools we used created structures of communication and responsibility that didn't fit with the way we actually needed to structure the work. This meant that resistance to adoption was strong and animosity grew, whilst some members of the team felt under huge pressure to plug the gaps.

**What you should do:** Allot time for training and also for using the tools prior to really starting the project. It's a good idea to offer training to all members of the team so no one feels singled out or behind the curve. Create a culture of support by making sure the team is aware of who to go to or how to find the help he or she needs, whenever it is needed. Even if people get trained on how a tool works, the most valuable part is using the tool and finding the questions and problems that arise before it's really go-time. Create initial projects or tasks so everyone has a shared objective to work on as a way to get introduced to the tools without the pressure of doing it for real. Make sure the tools aren't changing the way you work and getting in the way of doing your job; if they are, drop them, it's a false economy to make your processes more efficient if they're the wrong processes.

## Engagement

The group also had very strong connections either with their own technology experts or as part of communities which included such experts. This led to the **third major mistake**: prioritising conversation and engagement before there was content to discuss. We were really excited to share our ideas with each other, and even more

excited to share our ideas with the rest of the world. We knew that talking about successes and failures, innovations and new ways of doing things would be integral to really creating a space for shared learning—whether it be an expert taking part, or something exploring social media for the first time. So, we imagined that these conversations were so important that they would need to start right away. Plus, there was a huge network of people we thought would be excellent to engage for input, links, resources and quotes.

**What we did:** We were so ready for convening conversations that we created a blog and selected bookmarking tools designed for conversation and not building our handbook. The blog was intended as a place where we could post ideas, snippets of conversations, or more substantial work in the making. It would mean we could put things out for the community to weigh in about, help us shape and refine, and ultimately create real material to be used in the final resource. But what happened was that we either had ideas or information that went into our handbook, or it was too squishy to articulate and just stayed in our brains for reworking. We also faced the fact that we weren't, ultimately, in charge of starting the conversation since we were commissioned for the work with the intention, more properly, that the conversation would start with the release of the finished handbook. Likewise, we chose a tool for collectively bookmarking websites, videos, blogs and other pieces of information that would be useful for the handbook and as further resources for the handbook readers. We chose a bookmarking tool that created a great place for conversation and comments attached to every link or other media posted. But we didn't have anyone to share it with, so there wasn't any conversation. We were posting resources into an empty closet. Our initial ideas to engage non-authors in the conversation and content prior to creating any, or publishing any, turned out to be much more difficult and ultimately impossible – and the content collected wasn't in a form that was easy to integrate and publish, which ultimately wasted a lot of the work. And when we finally did engage others in writing content for the handbook, it happened at editorial stage without the involvement of the rest of the team. We tried to create general conversation and engagement, when actually the most effective engagement tool was simply to ask people directly if they wanted to write content for us.

**What you should do:** Be excited for conversation and connection, for sure we weren't wrong there! Social media is made to be social, after all. Do evaluate your process and when different audiences will be introduced as this can effect the content you have, and could even effect which tool you use. Your social media plan should include goals that address what kind of connections you want to have with your community and how you'd like individuals to be able to connect (is it a 4-person team that needs a way to share knowledge, a 1000-person community you want to empower to give feedback, or an unknown group you want to provide information and resources to?). When you identify the audience and how you want to connect with it, it is easier to identify the appropriate tools for that connection and when you'll be able to start making it happen. Make specific requests of people too, it makes it much easier for people to engage and support you.

## Purpose

We were all incredibly interested and excited to work on this handbook, with ideas bubbling up every time we tried to talk about it. This led to the **fourth major mistake**: excitement and knowledge do not outweigh the need for a clear purpose and specific deliverables. We never arrived at a clear purpose that we all agreed on and could work towards, which meant at times we either went off in wrong directions or got stuck and didn't know where to point our energies. The wiki was the most successfully-used tool in terms of tangibly progressing the project, as we were able to see the handbook coming together in front of our eyes. But it took a while for us to actually get to that practical stage.

We certainly felt at the beginning that we'd been set an impossible task: to create a guide to using tools that change every day. But as much as this is a difficult task, it is still possible with specific parameters. It isn't so new that there is no information, nor is it something beyond the capabilities of the authors. We were very ready to consider our previous thinking, discuss ideas, come to new positions, and then rethink those as well. But, alas, this was not an intellectual or philosophical endeavor, it was a practical one. Once we had stopped trying to get everything exactly right, focused on an achievable goal and allowed ourselves a few "it depends" moments, things moved much quicker.

**What we did:** Given our backgrounds in the sector, we were quick to point out examples and options of tools and organisations and even our own work, creating a wider and wider scope without narrowing the working scope. We got stuck in the thinking and researching, the pulling together of all the thinking from experts and thinking about their thinking. We divided the work among members based more on theoretical divides and not on the actual end-structure of the handbook and its parts. This only made matters worse for actually getting the handbook written and edited. We needed a much clearer shared agreement on the specific work that needed doing, and who the handbook was for, so we could ensure every piece of work we did was genuinely helping us reach our objectives. We also each, including NESTA, had slightly different stories in our heads about who the handbook was for and how it would be used, which meant what was written took a lot of effort and time to edit together into one consistent whole.

**What you should do:** Clearly identify your audience from the beginning of your project. Who will be receiving your services or your message? Who it is determines how that service or message will need to be delivered. You might also want to create 'use cases' for the main ways your output will be used and agree on these too, so you all have the same stories in mind when you're working separately. Create a flexible map of your project and allow time for research and thinking flexibly so that if in the research and thinking something surfaces beyond or different from your preset scope of the work, you may want to evaluate whether to redesign the scope. Identifying your goals is also crucial. In this case, though, your goals are based on outputs and change. For example, do you want to make a more connected community online with your members, or provide a new way of sharing knowledge or community, create a conglomeration of resources and conversations, or write a handbook. When you identify your audience clearly and understand what they need, you are much more able to successfully reach your goals. A handbook for every audience serving every purpose is impossible; a handbook to help a specific group of people achieve something is possible - and much more useful too.

## Tools

In our proposal we outlined the following communications tools for use:

- Cassfocus (a same-time, same-place 'electronic boardroom' system)
- School of Everything Scrapbook (a form of social bookmarking)
- Project Blog
- Project Wiki
- Semantic Media Wiki
- Huddle
- Other media eg Flickr, YouTube

Here are the tools we really used, and how we really used them:

- Huddle: for project collaboration, a placeholder and go-to spot when information or conversations needed to be stored and archived, for high-level thinking and project information sharing with NESTA.
- Wiki: for the meat of it all, writing, editing and framing the handbook.
- School of Everything Scrapbook: collecting links to be used in handbook content and as further reading by handbook recipients.
- Blog: for starting conversations without an audience to comment (only 3 posts).
- Delicious: for collecting links in a more streamlined fashion with individuals' work as it is an application already integrated into many of our toolsets.
- Personal blogs: for highlighting ideas and conversations that come up as we work on the handbook, a way to discuss issues with a community of readers that already exists.
- Email: for direct communications and for those team members struggling with Huddle or the wiki.
- Microsoft Word: for assembling and presenting edited content, including layout, and recording tracked changes and client feedback.

Although much of our initial focus was on new collaborative tools to increase our efficiency, we ended up relying on 'old-fashioned' e-mail and word processing to actually get it finished.

## Victory?

Overall we feel we have accomplished what we set out to do: the handbook was written, and we created some useful conversations and resources alongside it and "ate our own dogfood".

Could it have been done more efficiently? Yes, undoubtedly, and the editorial process in particular could have been greatly simplified by having a clear direction and shared understanding of the project from the outset. But we rallied a team of people who had never worked together before and delivered a difficult project in a very short space of time, to what we hope is a high standard. We adjusted well to new developments,



re-evaluating and spotting new opportunities instead of being bogged down in the obstacles. And most importantly, we've shared what we learnt. Whether the handbook itself is deemed a success or a failure, we have all learnt so much about how these technologies and collaboration work, and how to write and publish a book too, which means by its own standards, the project has been useful.

We hope you think so too.

## How to publish a book

by Andy

This handbook is something of an experiment, for us and for NESTA, in publishing a book in print and online and rallying a community of practice around it. Here's how we did it:

---

1. First, gather the content together in a collaborative space, such as a [wiki](#) <sup>[2]</sup> or [Google doc](#) <sup>[596]</sup>. Don't worry about formatting too much, but get the copy neat and tidy and make sure all the links work.
2. Next, work out a paper size, basic design ideas, colours, ideal page length, budget and price.
3. Then, transfer it into Word or another word processing package, and start assembling a first draft. Make sure you use proper "Styles and Formatting" (Heading 1, 2, 3, Hyperlink, custom styles etc.): discipline about marking up the content here will save you days later on.
4. Commission a designer to create mock-ups of the book and a parallel website. Create a style guide too, specifying how all the styles in the Word doc should be printed in the final version. Also, ask them or a [front-end](#) <sup>[2]</sup> developer to turn the style guide into a [CSS](#) <sup>[2]</sup> style sheet for the website.
5. Obviously at this point there's a lot of to-ing, fro-ing, proofreading, editing etc. (Laws, sausages and books: it's best not to see how they're made.)
6. Once you have a final draft, you can either do the layout in Word or else in a [DTP](#) <sup>[2]</sup> package like Quark Xpress. Make sure you include print resolution imagery, and preserve the links and styles.
7. Proof the final copy in print so you have final, corrected text for everything. Once you've finished, produce a final print-ready [PDF](#) <sup>[2]</sup>, and also optimise the images and produce a web version.
8. Export it as [HTML](#) <sup>[2]</sup> (so all the links still work) and use this to develop the website version. Then ask someone to build you a website from the proofed copy, CSS style sheet and mock-ups. You can use a platform like [WordPress](#) <sup>[596]</sup>, or code it from scratch. (We used a simple [Drupal](#) <sup>[7]</sup> system.)
9. Send the print-ready PDF to a publishing company like [Lightning Source](#) <sup>[597]</sup>, or deal direct with printers yourself. They will print copies for a fixed unit price whenever you send them the order.
10. At this point, you can also export the content for e-book readers like [Kindle](#) <sup>[598]</sup>, if

you want.

11. Use Paypal or another system (again, a publishing company can help) to let people order the book from your site online. That way people can buy the book directly from you.
12. Have a big launch party, invite all your friends, and force them all to buy it.

And if that's all too complicated, the nice folks at [OpenMute](#) <sup>[594]</sup> can sort it all out for you.

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## The end

Well done. You've finished the handbook.

Give yourself a pat on the back.

(Don't worry about skipping over the boring bits.)

(Or about not doing all the things we told you to do.)

Now that you've got to the end, you might want to go off and get stuck into some work. If so, we hope you refer back to this handbook and find it useful in running your own projects.

But if you're still keen to keep exploring, here are a few things you can do:

Check out the handbook online for free at [www.socialbysocial.com](http://www.socialbysocial.com) <sup>[602]</sup>. We're going to keep adding content and revising what we've written for a while there, so come visit and see what's new.

Add your own comments to the online handbook, whether that's taking pot-shots at everything we've said, telling us what you found useful, or adding your own ideas to the conversation.

And please follow the links in the [Companion](#) <sup>[7]</sup> online, and also check out the additional content – and post your own resources – on the [School of Everything Scrapbook](#) <sup>[339]</sup>.

Or say hello to us at [socialbysocial@gmail.com](mailto:socialbysocial@gmail.com) <sup>[603]</sup>. We might even write back.

We had fun writing this handbook, and we really hope you enjoyed it too, and found it useful.

But most of all, we hope you'll talk about it.

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