



Carleton
UNIVERSITY

Philanthropy and
Nonprofit Leadership
School of Public Policy and Administration

Social Media as Strategy: A Tool for Community Engagement and Development

The Metcalf Foundation

PANL 5008 Capstone Project



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Abstract

Social media has become a new buzzword in nonprofits and other organizations – heralded by many as a new way to reach and engage marginalized populations and to support significant progress in community development, mobilization and social change. This report explores the role and function of social media as a tool for community engagement, in order to uncover enabling social media strategies and interventions that can be used to engage low-income and marginalized populations. Drawing on an extensive literature review and community interviews, this report highlights the usefulness and challenges of social media as a potential strategy and tool for engagement. It highlights key considerations and approaches for utilizing social media for community development and for engaging with low-income populations. This research finds that utilizing social media – or any other communication and engagement strategy – requires careful planning and consideration related to mission, strategy and capacity. In particular, this research finds that social media is no silver bullet, highlighting the importance both of nonprofit capacity in developing and running any social media strategy and of understanding how diverse communities access, use and engage on social media. This research was conducted in partnership with Carleton University and the Metcalf Foundation, as a requirement towards completion of the Master in Philanthropy and Nonprofit Leadership program.



Acknowledgements

I would like to acknowledge the Metcalf Foundation, and in particular, Adriana Beemans, for identifying a fascinating and important research question, and for her guidance and support with the research process. I would further like to acknowledge the contributions I received from my advisor Professor Paloma Raggo, and my reader, Gina Grosenick from Carleton University, who offered me critical insights at every turn, and helped me to keep this project relevant and manageable.

A big thank you to all those who participated in interviews and shared their expertise, experience, challenges and successes with practical and innovative social media, and new media tools and strategies.

Thank you to my classmates at Carleton University for their support and guidance, to Ginny Santos for her creative and positive input, and to the staff at the various Toronto cafés where I spent most of my time while I wrote. Finally, thank you to my loving, whacky and supportive family who gave me the space, time, encouragement and energy to persevere with my studies and this project. In particular, to Elaine Lowe, my patient editor and the best mom anyone could ask for.



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Executive Summary

Nonprofits have expressed considerable interest in using social media to effectively reach and engage low-income and marginalized populations. Indeed, social media and new technology are heralded by many academics, community leaders and funders as a new way to reach and engage marginalized populations and to support significant progress in community development, mobilization and social change. Many nonprofits are trying and testing models for using social media for outreach and engagement, with varying levels of success depending on the communities' they serve and their capacity and organizational culture.

This report explores the role and function of social media as a tool for community engagement, in order to uncover ways in which – and whether – social media strategies and interventions can be used to engage low-income and marginalized populations. This report draws on an extensive literature review and community interviews with social media and nonprofit experts in Toronto. It highlights both the usefulness and the challenges of social media engagement for nonprofits working with low-income and marginalized populations.

The literature on social media engagement demonstrates the rapidity of change related to new technology and the growing body of research on nonprofits and social media. However, there is a lag between research on social media and the actual on-the-ground experiences and practices of nonprofits today. This research explores this gap, highlighting practical considerations and experiences of nonprofit staff, community organizers and social media experts, and offering key recommendations for enabling nonprofits to engage effectively using social media.

Overall, this research finds that utilizing social media – or any other communication and engagement strategy – requires careful planning and consideration related to mission,



strategy and capacity. In particular, this research highlights that social media is not a silver bullet, and that successful social media strategies require considerable capacity, as well as a strong understanding of how diverse communities access, use and engage on social media.

For nonprofits, wherever possible, organizational strategic planning should be the starting point before developing any social media campaigns and engaging online, and that these strategies should be a part of the organization, not a stand-alone strand of the organization with one person doing all of the work. While risk and trial and error are a part of using social media, as these are new spaces where nonprofits and others are constantly learning, this research supports a more strategic and embedded approach to social media engagement.

Funders can facilitate and support nonprofits to effectively develop both sustainable and relevant social media and technology strategies and the capacity to support and engage low-income and marginalized communities. However, the value and potential of these strategies and tools must be carefully considered within the different nonprofit and community contexts, and must always relate back to the organizational mission. This research reveals a number of both challenges and opportunities for using social media within nonprofits for community engagement, development and mobilization purposes with low-income and marginalized communities. The research offers key considerations and a framework to think about and use these strategies effectively.



Introduction

Project Overview

New technology is developing quickly and there are no signs that it will slow down. Social media in particular, has never been more prolific than it is today (McCorkindale & DiStaso, 2014). Social media is one form of web-based technology, where social interactions, content sharing and conversations are central (Taylor, 2011). It has been described as a “new form of conversation” (Hollett, 2014) and there is increasing interest from nonprofits and other community organizations in understanding, testing, using and evaluating the potential of various social media platforms to engage in new ways with the communities they serve. Social media includes thousands of internet options for sharing, dialogue and engagement, including some major sites such as Twitter, LinkedIn, Flickr, Pinterest and Facebook. Each of these platforms provides different experiences and capabilities, and each tends to have a different following. As such, how nonprofit and community organizations think about and use social media varies based on their purposes, strategy, the communities they work with and the organization’s capacity.

The use of social media strategies is of considerable interest to nonprofits and other community organizations hoping to engage low-income and marginalized populations in greater numbers and more effectively. Indeed, the ways that nonprofits and community organizations engage meaningfully in community development and social change are being fundamentally altered by social media (Curtis et al., 2010). However, technology is rapidly changing, and the variety of tools and strategies can be difficult to understand – especially for nonprofits and community organizers, already frequently working beyond their capacity. Many nonprofits are trying and testing social media for outreach and engagement, with varying levels of success depending on their purpose, the communities they serve, and their capacity and organizational culture. Nonprofits often dive into using social media, without always fully exploring its usefulness in the context and for



their purposes. For example, creating an organizational Twitter account to reach marginalized communities with detailed information is unlikely to be effective. This type of platform tends to be used to share quick information and news, and would not necessarily be the best tool to share detailed service information. This type of social media use can result in an ineffective engagement strategy, with little positive results for the organization and the communities served. At the other end of the spectrum, some nonprofits are reticent to use social media at all, and may be missing opportunities for unique ways to reach out to and to engage in new ways with the communities they serve, as well as to support their mission.

The Metcalf Foundation is a funder of innovative strategies and community development initiatives. As such, it is interested in better understanding the current use of social media by nonprofits, the possibilities of new media technology and tools in these contexts, and the challenges, constraints and considerations of social media engagement. Social media may be a particularly important tool and strategy for some nonprofits and community organizations working with low-income and marginalized populations, as it can provide new opportunities to reach some communities, share information, dialogue and engage; and to do this on a significant scale. This research is an exploration of the use of social media within nonprofit organizations engaging with low-income and marginalized populations.

The report highlights key considerations for utilizing social media strategies, lessons learned and challenges drawn from both the literature and a series of community interviews. Overall, this report offers nonprofits and other organizations engaged in community development, service and social change a framework to think about and to use new media engagement tools and strategies effectively. This report does not present a “how-to” for nonprofits, but instead outlines key considerations from interviews and the literature for understanding social media and recommendations for how nonprofits can experiment and engage strategically and practically. This report can be used by nonprofits and other stakeholders engaged in community development work with low-income and



marginalized populations in order to better understand social media, its potential as a tool, and to explore effective strategies and key considerations related to it.

Project Scope

The original project focus was to explore examples of social media practices. However, early data collection and literature revealed that social media tools – and subsequently, strategies – are not one size fits all; there are dangers in promoting best practices and social media models for community engagement and development, as they lack the context of nonprofit capacity and the uniqueness of each tool and strategy to each community and cause. This report does not provide a template or formula for nonprofits and funders, but instead offers a broader examination of social media strategies, challenges, successes and relevant literature, providing key considerations and recommendations for developing social media strategies to engage with low-income and marginalized populations.

Definitions and Key Concepts

There are often confusing, conflicting, and overlapping terminologies used to describe new technology. New technology, often used interchangeably with new media, is an all-encompassing term to describe web-based and mobile phone technologies, including technologies such as social media and digital media. The term is perhaps outdated, as such technology is no longer “new” (Hollett, 2014). While this report focuses on the potential of social media as an engagement tool with low-income and marginalized communities, there is a need to define and clarify related terms. The following definitions apply to terms related to technology and the social uses of technology discussed in this report.

First and foremost, as previously defined, social media are web-based platforms for social interactions and user-created content, and include a diversity of sites with the over-



arching commonalities being conversation and sharing. Kaplan and Haenlein (2010) define social media as a group of internet-based applications that allow for the exchange of content created by users. Encompassed within social media are social networking sites, video, music and photo sharing sites, blogs and forums. Social networking is “using social media to network online” (Taylor, 2011). Social networks are “relationships based on trust, reciprocity and social norms that increase a person’s access to information, skill sets and ability to be an active participant in society” (Taylor, 2011). Social networks are further described as the “links and relationships connecting people with one another and with organisations,” and help communities survive poverty, marginalization and other facets of social exclusion (McCabe et al., 2013).

Social exclusion is defined as “a process whereby certain individuals are pushed to the edge of society and prevented from participating fully by virtue of poverty or a lack of basic competencies and lifelong learning opportunities, or as a result of discrimination” (Haché et al., 2010). Social exclusion is encompassed into five broad and overlapping dimensions: labour market exclusion; education-related exclusion; health-related exclusion; housing-related exclusion; and exclusion from social networks (Haché et al., 2010). Social inclusion, on the other hand, is defined as “a process which ensures that those at risk of poverty and social exclusion gain the opportunities and resources necessary to participate fully in economic, social and cultural life, and to enjoy a standard of living and well-being that is considered normal in the society in which they live” (Haché et al., 2010). Inclusion translates into access to opportunities to gain social capital and networks.

Social networks are also critical to understanding people and the ties between them (Christakis & Fowler, 2009). Social media are not new, but sites differ tremendously (Mansfield, 2012). For example, LinkedIn is designed as a social networking space for career and employment, with professional contacts and content sharing, compared to sites such as Facebook that is predominantly casual and about personal contacts and connections, not career. Digital media is another umbrella term for new technology – not



limited to online platforms. It includes text, images, audio, and video, as well as the technology used to create or support such content (Hollett, 2014).

Engagement has been defined as “some action beyond exposure, and implies an interaction between two or more parties. Social media engagement is an action that typically occurs in response to content on an owned channel” (Conclave, 2013). Engagement has been described as dialogue and conversation, but has perhaps best been described as an all-encompassing way to communicate well enough that the social media audience pays attention (Falls, 2012). At the core of engagement is building and maintaining relationships (McCorkindale & DiStaso, 2014). This includes all levels of social media engagement, from passive observers, to more active forms of engagement such as re-posting or sharing content, dialoguing or commenting on content, and taking action on- or off-line. Academic literature on social media engagement has been described to include three tiers or types of engagement: information, community, and action (Lovejoy & Saxton, 2012). These types represent a “hierarchy of engagement;” with dialogic information provision as an early form of engagement; deeper engagement with social media follows in an attempt to build a “community” of followers who interact, share and converse online; and finally, engagement as “action” where stakeholders actually “do something” for the organization or cause (Lovejoy & Saxton, 2012). Similarly, engagement pyramids have been used in community organizing to deepen movement building from peripheral involvement to leadership in mobilization and activism (Hollett, 2014). How engagement is used within this report primarily focuses on the “community” and “action” levels with low-income and marginalized populations, while acknowledging that engagement can take many forms – including active and passive.

Dialogue differs somewhat from engagement, yet is frequently interchanged with the term conversation to mean “some form of online or offline discussion by customers, citizens, stakeholders, influencers, or other third parties” (Conclave, 2013). For social media dialogue, this can include discussion and conversation about an organization, brand, and relevant issues, through the organization’s channels or other third party online



channels (Conclave, 2013). Dialogue is described as having five elements: mutuality, propinquity, empathy, risk, and commitment (Kent & Taylor, 2002 as cited by McCorkindale & DiStaso, 2014).

New technologies are far-reaching and diverse – including in the nonprofit and community development sectors. In order to keep the project scope manageable, and to assure that the results would be applicable to nonprofits and community organizations, this project focuses on social media engagement for community development, engagement, and service- and information-sharing purposes. The research does not explore the potential of using social media as a fundraising tool – a key area of nonprofit literature on social media (Mansfield, 2012). This research draws on academic and community-based literature, as well as key informant interviews with nonprofit and social media experts engaged in projects and research related to community development, activism and service delivery in Toronto.

Methodology and Limitations

An extensive literature review was conducted to identify key research about social media and nonprofits during the last five years (2009-2014). Academic and community-based research materials were gathered primarily online, identified through such sites as: Google, Google Scholar, academic journal databases, as well as materials shared and recommended by key interview informants, and the research supervisor and reader. The literature review focused on social media as an engagement tool – specifically in relation to nonprofits. Themes and findings are focused on literature from the last five years, as rapid changes in technology can quickly make materials less relevant, with new platforms and strategies developing and replacing others.

The researcher received ethics approval for this project from Carleton University and all interviews were conducted between September and November 2014. The Metcalf Foundation identified initial interview participants, sharing contact information with the



researcher. Initial contact with interview participants was made by email. For all primary research activities involving persons, consent forms were developed, distributed and explained to all participants (Appendix A). Written or verbal consent was collected from all research participants. A snowball sampling method was used to identify further interview participants during interviews, and follow-up emails were sent to connect with prospective interview participants.

In total, eight (8) interviews, with ten (10) key informants were conducted with respondents in Toronto. Two interviews were conducted simultaneously with two respondents from the same organization. Three (3) interviews were conducted by phone, with the remainder taking place at informants' offices and local coffee shops in Toronto. Questions were open-ended and the interviews were informal, allowing the conversations to evolve and enabling the exploration of interesting themes as they arose. An interview guide was used to direct the conversation, with questions largely revolving around social media knowledge, practical experiences and examples of utilizing social media, advice and reflections for other nonprofits, and challenges and lessons learned (Appendix B). During interviews, terminology related to, and including, social media were not defined and agreed upon; therefore new technology, online content, digital media, mobile technology and social media are all discussed and explored in this research. This further confirmed the overlapping and, at times confusing, terminology related to social media and the variety of tools available for engagement. Extensive notes were taken by the researcher, and no interviews were audio recorded. This was to maintain a casual and informal interview environment for participants. Notes were reviewed several times in detail and compared to one another to identify key themes and pertinent quotes for the report. Interview respondents' discussions are combined within the report to ensure participant confidentiality; however, and a coding system from 1-10 is used to discern individual responses from one to another.

This research project did not include the voices of low-income and marginalized community members directly – though some key informants who are service providers and



community mobilizers held a strong affinity and shared many connections with the marginalized groups and communities with whom they work. Directly impacted communities using and engaging with social media were an original component of the research design. However, early literature revealed that the diversity of low-income and marginalized voices from different communities and how they use and engage with social media could not be fully captured in this research. Further, time and resource constraints for the researcher, such as the inability to provide remuneration for participation in interviews to low-income and marginalized individuals, were part of the decision to focus this report on social media as a strategy, from the perspectives of those who work in nonprofits, and are community organizers and practitioners. This report emphasizes lessons learned from other nonprofits and community organizers, and the types of considerations that nonprofits need to think about when building strategies using social media technology to engage with vulnerable populations.



Background and Context

Some background and context related to Internet and technology access helps to frame the potential and limitations of social media as an engagement tool for nonprofits working with low-income and marginalized populations. According to a 2014 Pew Research study on Internet use in the United States, 74% of online adults use social media sites. In Canada, data from Statistics Canada's Internet Use Survey (2013) reveals that in 2012, 83% of Canadian households had access to the Internet at home, compared with 79% in 2010. Further, 58% of Internet users used a wireless handheld device such as a cell phone or tablet, up from 33% in 2010. The majority of this growth was due to Canadians aged 16 to 24, about 84% of whom were connecting to the Internet through mobile phones (Statistics Canada, 2013). Just over two-thirds (67%) of Internet-using Canadians used social media sites in 2012, up from 58% in 2010. In 2012, female Internet users were somewhat more likely to use social media sites than their male counterparts (70% versus 64%) (Statistics Canada, 2013). According to Campbell Salazar (2010), "media access is arguably stronger than ever before, with cellular coverage reaching 90% of the planet."

However, growth is not uniform across Canada. While 98% of all households in the top income group (with household incomes of \$94,000 or more) had home Internet access, only 58% of households in the lowest income group (with household incomes of \$30,000 or less) had Internet access at home (Statistics Canada, 2013). While access to high speed Internet and mobile phones is increasingly common, there are still many barriers for individuals, families and communities across Canada. Poverty in Canada is a persistent challenge, with racialized communities particularly marginalized and affected, the working-poor comprising a growing percentage of those living in poverty, as well as families with children and in particular, single mothers (Statistics Canada, 2011; Galabuzi & Block, 2011). According to Statistics Canada's low-income cut-offs, 3 million



Canadians (8.8% of the population) fell within the low-income bracket in 2011, unchanged from 2010 (Statistics Canada, 2011).

With the Internet and other technology platforms and mediums more commonly used to gain access to necessary information, services and resources – as well as growing challenges related to poverty and marginalization – the lag between the technology ‘haves’ and ‘have nots’ is widening and the impact is increasingly severe. Without access to the Internet and new technology tools, there is no opportunity to use and engage in the many important social networks online. The ‘digital divide’ is a term used to describe the inequalities in Internet access (Vicente & Novo, 2014). An ‘organizational digital divide’ similarly describes the inequalities between organizations that have the resources to strategically use the Internet and technology to support their mission and work, and those that do not (Lee & Bhattacharjee, 2011). There are reasons to believe that these digital divides will diminish significantly, especially with the rising use of mobile phones as a low-tech and affordable access point to digital technology (Lane et al., 2006; Warschauer & Matuchniak, 2010). However, for the time being, the reality of unequal access to technology, tools and the skills to effectively use them, can have severe impacts on individuals, communities and organizations – especially as the world moves further online.

Neoliberal policies have led to increased off-loading of government services onto nonprofits, with a drying up of both program and core funding, at the same time as increased need for support services delivered by nonprofits and organizers in the community (Gibson et al., 2007). In the context of growing social and economic inequities, community development, mobilization and the provision of social services and supports are critical. Nonprofits, starved for resources and funding, are trying to stretch services and support low-income and marginalized individuals, families and communities in Canada. According to Lee and Bhattacharjee (2011), nonprofits are threatened by four environmental forces: (1) decreased government funding; (2) increased demand for programs and services; (3) decline in civic participation; and (4) and increased public



demand for greater oversight and accountability. These factors contribute to social media opportunities, as well as challenges, to engage with low-income and marginalized communities, and to develop cost-effective and scalable ways of supporting community development, community support and positive social change.



Social Media Literature

Literature on social media at the organizational level has been scant until fairly recently (McCorkindale & DiStaso, 2014; Taylor, 2011; Lovejoy & Saxton, 2012). While the last five years of rapid technological change have been accompanied by a surge of recent academic literature on social media, the research and literature cannot keep pace with the speed of technological change (McCorkindale & DiStaso, 2014). Further, while this is shifting, the perspectives and writing from social media users – namely youth – has been less prevalent in the literature, as social media is not a native medium for most – namely adults – who research and write about it (Herring, 2007). Literature on nonprofit social media practices is also limited, with a great deal of this literature focusing on dialogic use of social media, and new technology and social media for fundraising (Nah & Saxton, 2012). This makes it difficult to learn from the practices and examples that are being employed (Taylor, 2011; Kanter and Delahaye Paine, 2012). As such, this literature review focuses almost exclusively on studies conducted between 2009 and 2014, because social media and technology are developing so rapidly. Many academic studies on social media are being published now, but reflect the reality of social media research findings from years ago. The drastic changes in technology and social media mean that these studies and findings should be used more as benchmarks and theoretical and contextual underpinnings, rather than a guide to current social media practices.

Social media, most often associated with particular online platforms and apps, is usually “defined by a community and driven by sharing content, but at its core is a dialogue” (Hollett, 2014: 11). Largely, social media is about engagement, dialogue, and ultimately, connection. As previously discussed, there are various social media tools and platforms, such as Twitter, Facebook, LinkedIn, YouTube and Pinterest. Social media includes platforms for greater communication for nonprofits and activists to meaningfully interact with their supporters, reaching new communities, and promoting events (Campbell Salazar, 2010). The Internet and social media have facilitated the emergence of a “self-



mass communication system” where the ability to create media and broadcast and engage online has shifted how information is shared and received (Castells, 2012). This has shifted online conversations from dialogic – one-way and often top-down – towards multi-directional community-driven communications, with community engagement at the core (Bortree & Seltzer, 2009).

Enabling technology

Some argue that social media has awakened and catalyzed citizens to take action and mobilize on- and off-line (Mansfield, 2014: 244), while for other, social media is a tool to bring people into conversations – but is a weak connector (Mullins, 2013). Discourse on participatory media argue that the cultures emerging from the use of social media should not be reduced to the enabling technology, but instead, should be seen as a cultural shift and the way the culture actually operates (Rheingold, 2008). According to many, social media is simply a new form of communication using a new tool – “when boiled down to the essentials, [social media is] virtually no different than the old community word of mouth system... with one huge difference, instead of dozens or hundreds of possible spreaders of the word, now we have millions and millions which translates to unlimited scope to get the word out” (Mullins, 2013).

For mobilization and engaging in social movements, social media have been described as very important tools, reporting on and influencing collective action (La Rosa, 2014). Social media and mobile phones have played a particularly important role in mobilizing people and communities very quickly, reducing costs, promoting engagement, and creating community (Garrett, 2006; La Rosa, 2014; Harlow, 2012). For example, the Idle No More (#idlenomore) movement used social media effectively to quickly unite First Nations communities across Canada on issues of Indigenous sovereignty, and water and land protection – moving into an international movement with a significant presence (Hollett, 2012). Most research on social media and community mobilization highlights that the Internet and social media facilitate traditional offline activities such as demonstrations and meetings, giving more resources for activists’ repertoire and/or that social



media creates new forms of activism improving social impact (Harlow, 2012). However, some research on social media engagement shows a difference between interest and actual involvement – “an activation gap” – mobilizing people to do something beyond listening and dialoging, to taking action (Rheingold, 2008). Indeed, the term “slacktivism” or “clicktivism” has been coined to describe this activation gap – where online activism is strong, but moving this into action is weak (Karpf, 2010). Others argue that social media and online engagement have intrinsic power because they provide “opportunities to see,” which may or may not include a set of eyes reading the content (McCorkindale & DiStaso, 2014). While this means that social media has the potential to be far-reaching, some research shows that organizations with the most social media success embrace their *local* communities and cultures, rather than trying to take a wide and far-reaching approach in their efforts (Waters & Lo, 2012). This suggests a focused and localized approach is most appropriate for social media engagement with marginalized and low-income communities.

Social media across communities

Communities and how they access, engage and use social media are diverse, and strategies must be unique to the context and goals of the organization. Furthermore, online communities are also unique, each “with its own ebb and flow of content” (Mansfield, 2012: 77), and different communities and sub-communities engage with technology and social media in unique ways (Taylor, 2011). Social media has given voice to some marginalized individuals and communities, allowing for untold stories to be heard and broadcast, for greater public discussion and dialogue, and for facilitating the empowerment of many. Castells (2009) argues that online multidirectional engagement has potential to challenge and modify some of the existing power relationships. However, participation online still often mirrors inequalities offline and even widens them (Vicente & Novo, 2014; Taylor, 2011). Vicente and Novo (2014) highlight that a still-strong relationship exists between Internet access and use and individuals’ socio-economic features – implying that “traditionally disadvantaged groups in society are also those being digitally excluded.”



In 2011, Canadian researcher Taylor examined the extent, nature and benefits of social media use and engagement by, and with, five vulnerable populations – Aboriginal peoples, people with disabilities, recent immigrants, the homeless and seniors. She found that their experiences and needs were incredibly diverse. Taylor’s (2011) research highlights the diversity of access, use and online engagement by the above different vulnerable groups in Canada. According to her research, “the homeless are a surprisingly well connected group” – with most using cell phones, text messaging and many connected on social media (Taylor, 2011). For this diverse group, loneliness is a major challenge and social media –Facebook in particular – offer a space for homeless people to “regain contact with family members and actually help them rebuild relationships” (Taylor, 2011). Similarly, for people with disabilities, online “connectivity is a lifeline,” and social media engagement is particularly important as a tool (Taylor, 2011). First Nations and Indigenous peoples in Canada, across geographic areas, have embraced social media, “using social media to keep in touch with nearby and far flung family and friends, to fight addiction, to sustain endangered languages and practices, to advance environmental stewardship, to showcase Aboriginal arts and crafts and to promote cultural identity and political advocacy” (Taylor, 2011).

For many recent immigrants, especially those coming through professional skilled worker categories, using technology and social media for information and social connectivity are common. Taylor’s (2011) research highlighted that “many recent well-educated immigrants are more ‘tech savvy’ than the agencies that serve them,” while other immigrant groups have a steeper learning curve with technology and social media. All immigrants require online information and tools to build and maintain social networks, and to get advice and information on key settlement issues such as job searching and immigration (Karim, et al., 2007). According to Taylor (2011), social media can help to “cushion the emotional and psychological stress” of the initial arrival and settlement in a new country and community. Social media use among seniors is varied, but limited (Taylor, 2011). Where it is present, elderly populations engaging in social media appear



to be less lonely, have greater contact with family, lower rates of depression and strengthened relationships, resulting in overall enhanced well-being (Taylor, 2011). However, for this population, social media does not seem to provide a new source of friends and social ties, indicating that other off-line social opportunities continue to be a vital source of new connections and friendships for seniors.

Social Media in Nonprofits

Social media is often associated with the business sector; it is frequently unacknowledged that it was often nonprofit organizations that first adopted social media as a networking and communications tool (Mansfield, 2012). According to Mansfield (2012), there are three eras, or stages, of nonprofit web communications, each building on the other: the static web – characterized as broadcasting from one to many; the social web – characterized as engagement with supporters using social media, rather than broadcast; and the mobile web – combining tools of the previous two, but enabling their use on mobile technology. This last phase is critical, as we have seen the tremendous rise in the use of mobile phones globally. According to some projections, the mobile phone will account for the majority of Internet use and may reach almost full penetration levels by 2020 (Banjanovic, 2009). Social media has transformed many nonprofits' communication and fundraising methods. However, only some nonprofits have moved beyond one-way communications to start a dialogic engagement, where listening is at the centre of social media relations (Curtis et al., 2010). Indeed, Mullins (2013) describes one of the greatest assets of social media to nonprofits and community organizers – that it can also be used as a “listening tool” allowing for greater understanding of the issues, needs and relationships present. This can be invaluable for nonprofits – especially those just beginning to explore the use of online and social media platforms for engagement.

While there are varying perspectives on the need for, value, challenges and potential to use social media in the nonprofit sector, from a practitioner perspective, almost every nonprofit can now argue that it needs to have a social media presence because “that’s ‘where supporters are’” (Mansfield, 2012: 73). According to Kasper and Clohesy (2008),



as technology accelerates the pace of change in the nonprofit sector, there is a danger that nonprofits and community organizers will continue to do work in the same way, not keeping pace with current technology and the emerging realities of the future. They argue that nonprofits need to pioneer innovations with technology and social media to “fit the challenges and opportunities of the future.” Heralded in much of the literature as having the potential to innovate and creatively address the challenges facing nonprofits, social media and technology provide a sense of hope for social change work (Lee & Bhattacharjee, 2011). According to Neff & Moss (2011), technologies such as social media improve what nonprofits are capable of, supporting innovation and greater impact by engaging current and future stakeholders in real-time sharing, cooperation and dialogue. Social media’s interactive and decentralized format offers the advantage of a low-cost way for nonprofits to engage online with stakeholders and supporters, creating the potential to bring attention to issues that might otherwise be ignored by traditional media (Bortree & Seltzer, 2009).

However, “despite the hype of social media technologies, [...] there remain many significant questions and obstacles to seeing nonprofits truly embrace social media communication” (Waters & LeBlanc Feneley, 2013). Resource and capacity constraints in particular, pose a significant barrier and threat to the potential new strategic outcomes of social media engagement for nonprofits (Lee & Bhattacharjee, 2011). These very real capacity challenges for some nonprofits, dispel the myth that resources are only needed to develop social media engagement strategies, not to run, maintain, evaluate and improve them. It is all the steps beyond setting up a social media strategy that require significant capacity from the organization to run (Lee & Bhattacharjee, 2011).

Saxton and Guo (2011) found a strong relationship between the size of a nonprofit and their use of technology, with small nonprofits much further behind larger nonprofits in their adoption of basic enabling technology such as computers and the Internet. By contrast, Nah and Saxton (2012) found evidence highlighting that the availability, simplicity and affordability of social media tools today has resulted in an environment where non-



profits – regardless of size – can employ these strategies. On a practical level, Mansfield (2012) identifies some key elements about social media that nonprofits need to understand to achieve success. These include the fact that there is no customer service (organizations are on their own to figure it out), there are costs associated with using social media and technology (even if the platforms are free); and while community building is never a waste of time, online communities are fickle and not forever, and organizations need to be able to adapt and evolve with communities (Mansfield, 2012).

According to Lee and Bhattacharjee (2011), “many micro and small nonprofits lack the organizational and technological capacity necessary to translate the use of technology [and social media] into strategic outcomes.” This perspective, however, is challenged by Lovejoy and Saxton (2012), who argue that the advent of free technology and social media has eliminated this barrier for many nonprofits to a large extent. However, Lovejoy and Saxton’s study was based on large nonprofit organizations and their use of Twitter in particular. Resources, size and capacity related to technology in nonprofits are important factors that can influence social media use, suggesting that perhaps the size of the nonprofits in Lovejoy and Saxton’s study (2012) would have increased their capacity and starting point to developing and running social media strategies.

There is a diversity of experiences accessing and using social media by marginalized and low-income populations. For nonprofits and other organizations working with low-income and marginalized populations and considering social media for engagement, it is critical to consider the particular challenges, experiences and needs of the individuals, families and communities. Taylor’s (2011) research highlights a number of ways in which the staff at various nonprofits is learning about how to use technology appropriately within each diverse community. For example, one youth worker notes that they use Facebook to stay in touch with youth who are homeless, since “they are often without a regular phone or address, but will find a way to update their Facebook status. This way I can continue to support them wherever they are at” (Interview, as cited by Taylor, 2011). However, this research also identified privacy concerns that abound with social



media use and engagement with some vulnerable populations (Hollett, 2014). For example, Facebook and other social media are used by some as a space for accessing and buying drugs – increasing their vulnerability (Taylor, 2011). One frontline youth worker said that these types of concerns cause him to screen people who are added to the centre’s Facebook in order to minimize threats and risks to other youth (Taylor, 2011). In addition, this research highlights the diversity within and between communities.

The literature on social media engagement demonstrates the rapidity of change related to new technology and the growing body of research on nonprofits and social media. However, there is a lag between research on social media and the actual on-the-ground experiences and practices of nonprofits today. A considerable portion of the literature available highlights the positive potential for social media to transform nonprofits engagement practices. However, the literature also demonstrates that social media engagement will be influenced by nonprofits’ capacity – including resources and skills – as well as the purpose and type of engagement, the social media tools employed and the diversity of communities with which they engage.



Interview Findings

The following section highlights the key findings from the ten (10) interviews with service providers, community activists, activists and social media experts explore how nonprofit and community organizations utilized and considered social media engagement, and their vision for nonprofits using these tools in the future. Findings have been organized into broad themes, offering nonprofits and community organizations key considerations to explore for using social media engagement strategies with low-income and marginalized communities. The most overarching and reoccurring themes that emerged from interviews are: the importance of connecting social media strategies to overall organizational strategy and mission; that social media is an engagement tool and not a solution to nonprofit and community challenges; the importance of nonprofit capacity in developing and running any social media strategy; and the importance of understanding how communities access, use and engage on social media.

Organizational strategy based on mission

One clear theme emerged from interviews: social media is a tool and it should be employed based on the strategy of the organization or project's goal and mission – “develop a strategy based on the mission” (Interview #4, 2014). The purpose for which social media is used will therefore be tailored and varied across organizations. This includes the possibility that social media is an ineffective tool in some instances. For example, where the communities you are trying to engage with do not have adequate access to the Internet and other enabling technology. Therefore, social media is a strategy to achieve a goal, but it is no different than any other organizational strategy. It is a way of turning “what you have” into “what you need” to get “what you want” (Ganz, 2006). “It’s about making choices and implementing them with discipline across an organization” (Hollett, 2014). Nonprofits must consider “how the integration of social media fits within their organization’s strategy” (McCorkindale & DiStaso, 2014), and how this strategy helps to fulfill this mission (Hackler and Saxton, 2007). According to a number of re-



spondents, there is a tendency amongst nonprofits to forget about strategy when discussing the use of social media. One respondent noted that social media adoption and implementation among nonprofits tends to be reactive, versus goal-oriented and strategic as it should be (Interview #1, 2014). Another respondent noted that organizations often implement social media “because they are sexy, trendy and innovative, not necessarily because it will solve problems” (Interview #3, 2014).

Diversity of communities

The diversity of experiences, challenges and opportunities with social media engagement for various nonprofits and the communities they work with reflects the diversity and intersections within and between communities. Indeed, there is no universally accepted definition of community. Some communities are defined based on shared interests, locality, age or gender. However, any community “is defined as much by its diversity as by its commonality” as people belong to many communities at the same time (Ontario Government, 2006). This finding was echoed in this research, as key informants noted that particular social media strategies were effective in one instance with a particular community, while ineffective with another. This became particularly important in the context of larger campaigns and outreach efforts, where the diversity within and between various communities was more pronounced. One respondent noted the challenge of trying to bring a national Indigenous awareness campaign to the local level (where the actual issue was taking place), sharing that there was support with Indigenous and other leaders at the national-level, but the local-level Indigenous leaders and others had significant resistance (Interview #3, 2014). Interviews revealed that unique strategies need to be developed, including diverse platforms and tools, depending on the community, the issue and the nonprofit’s capacity.

Social media is a tool

Interviews highlighted the fact that social media and technology are tools of engagement, not solutions to nonprofit problems connecting with communities and supporting community development. They are tools to do outreach, share messages and engage in



conversations as “they bring people to the table” (Interview #8, 2014). As with other tools, a sound strategy for why, how and when to use social media was a prevalent theme that came up during interviews. One respondent noted that “social media is not a solution – technology actually takes the problems you have and breaks them into smaller problems” (Interview #9, 2014). Respondents highlighted that social media is a great tool for engaging in quick, cost-efficient ways online, but that organizations often end up talking to one-another, as opposed to reaching new people and communities. For others, social media was highlighted as a tool to keep in touch and to support sustained conversation and engagement, preparing communities to act and respond in “when things really start to get tough” (Mansfield, 2012).

Many respondents challenged the current tendency to see social media as a ‘silver bullet’ to online engagement and to supporting community development, stating that, in many instances, face-to-face interaction and other tools of engagement are best. Some noted that social media and digital engagement tools are “an easy way out” and that sometimes “we need to get back to the basics of organizing” and engaging (Interview #4, 2014). However, few of the respondents saw social media in relation to face-to-face engagement as an ‘either-or’ issue. Instead, most respondents felt that one often complimented the other – with some communities finding more value in one form of communication than another. According to McCabe et al. (2013), people are more trusting of information shared face-to-face, but this results in a much smaller network for engagement and outreach. Interviews confirmed this challenge as well – as respondents highlighted the resource-intensive nature of face-to-face work and the importance of this work, but struggled with the pressures to move engagement, information-provision and mobilization online: “this has a cost to the work we do and our impact” (Interview #4, 2014).

Capacity is critical

Respondents highlighted the importance of nonprofit capacity in developing and running social media engagement strategies. This was both in regards to the resource and time



capacities of the organization, as well as the skills and capacity of the staff within organizations. Respondents highlighted a particular reoccurring theme and concern with regards to capacity – that nonprofits sometimes dive into using social media, but that they do not understand the responsiveness trap – where as soon as you are online, you have a presence that you need to maintain. One interview respondent spoke on how nonprofits should use social media – “if you do it, do it well,” that is, consistently, frequently and actively (Interview #4, 2014). Mansfield (2012) also highlights this point with regards to the focus of organizations working with communities online; “it’s better to work with one community correctly than to do many poorly.” A nonprofit needs to be strategic about social media development, with understanding clearly that planning is different for social media – it’s “not linear or organized,” “yet [is] very strategic” (Interview #3, 2014). This shifts the organization from a bureaucratic way of organizing, to a carefully monitored environment that encourages strategic risks.

Interview respondents highlighted the inaccuracy of assuming that nonprofits have the technology within organizations to move to new strategies using social media. One respondent noted the challenges of just keeping their “practically ancient” computers working – and how there are not enough computers for all staff – and the frustration they feel when they are expected to miraculously move into a new working environment with technology at the forefront (Interview #8, 2014). Interviews revealed that there is a common presumption and myth among a number of nonprofits that using social media is simple, inexpensive and that “once it’s up and running, that’s it!” (Interview #8, 2014). Respondents highlighted that this is absolutely not true; that the time and capacity-building it takes to develop, launch, evaluate, refine, engage with and continuously evolve platforms and strategies related to social media is intensive. For nonprofit organizations that already struggle with resource and capacity constraints, developing and engaging in a number of online and social media spaces may be “biting off more than they can chew” in a sense, because of the additional challenges of managing and maintaining online communications (Interview #4, 2014). A couple of respondents suggested that for nonprofits facing significant capacity constraints, rather than developing a social



media campaign, could consider putting their limited resources into getting their news and content into other developed and existing social media spaces. For example, writing an article for a news outlet that has a social media presence.

Respondents expanded on the challenges with individual capacity and skill deficiencies, highlighting how their lack of training and skills development impedes their willingness to use social media within the organization. One respondent pointed out that nonprofit staff can be daunted by social media because “they don’t know how to do it [engage], so they just don’t do it at all” (Interview #8, 2014). A couple of respondents highlighted the challenge that nonprofit staff sometimes face with regards to assumed knowledge and connections online. For example, when nonprofits use platforms like Twitter or Facebook, they limit their following by adding a couple of common (to them and their current following) ‘hash-tags.’ For communications experts working within nonprofits (who lack the subject-matter and contextual expertise), she noted that this makes sense, since this is how online communications functions. However, from an engagement and outreach perspective with marginalized populations, the embedded assumptions of some tech-communications strategies become a barrier (Interview #7, 2014). Similarly, a nonprofit professional with content expertise may “miss the mark tremendously” in terms of their understanding and use of social media (Interview #7, 2014). This leads to a particular challenge for nonprofits; it’s not just about hiring new communications experts or providing staff with content expertise the space to engage using digital and social media.

Purpose of social media and online engagement

Interviews revealed that distinctions need to be made between using social media as a community mobilizing tool, versus a tool for information provision and service delivery. Respondents noted that there is overlap, as individuals may start with a service need or question, which may open up an online discussion or propel them to mobilize within their communities. Some noted that social media platforms “are dynamic” and take on new shapes and roles, depending on community, issue and context. One respondent noted that organizations should look strategically at their goals and then ask whether or



not they have a message or information to share, whether or not to engage online, and whether either or both is always necessary (Interview #8, 2014). Most highlighted that there are different strategies used to promote an organization, share information and resources, challenge perceptions or mobilize activism. However, almost all agreed that social media have the potential to be an empowering space for marginalized individuals and community – providing a space to create content, ask questions, seek out peer support, network, engage and connect. The use of Facebook, in particular, was noted as useful, as its informal post, share, like and comment format allowed for various levels of engagement and supporting some users to develop their perspective on political and social issues. According to one respondent, “sometimes just having the conversation and the opportunity to engage online is empowering” (Interview #10, 2014).

Respondents from service-oriented nonprofit organizations felt that social media provides opportunities to respond and engage on new platforms to share information and resources to people who need it. Many also felt that there could be considerable engagement, as people asked questions on forums and sought out information and support. However, sometimes “information is all people need – and it’s a quick relationship that is not sustainable. They get what they need when their questions are answered” (Interview #9, 2014). These respondents felt that the most effective strategy for reaching out with information and services was getting onto the online spaces that communities that you want to serve are already. These social media spaces are at times ethno-specific, but can provide a bridge for sharing information. According to another participant, “there’s no point in putting all your energy into Twitter or Facebook or whatever, when all your clients [or community] are on another site [...] you need to do your homework first” (Interview #3, 2014). This reflects the importance not only of the purpose and strategy employed with social media, but also to understand the diversity of each community you are trying to engage and to research the best ways to reach out.

For other interview respondents, the strategic importance of social media was using it as a tool for engagement and mobilization. Many of these respondents felt that the most



important aspect of social media was fostering, supporting and mediating connectivity and conversations online, as well creating and broadcasting media to mobilize participation. According to interview respondents who used and supported social media as an effective mobilization strategy in their work with Indigenous communities and youth, networking and connectivity promoted democratization and movement driven by participation, dialogue, engagement and knowledge-creation. For others, social media was highlighted as a space to connect with those who are already interested in and mobilizing on social issues. These individuals felt that they could share information and campaigns widely, but many felt that there was a significant “activation gap between those who ‘liked’ events, said that they would attend and those who actually came” (Interview #8, 2014). This echoed challenges related to an “activation-gap” and “slacktivism” as outlined in the literature (Rheingold, 2008; Karpf, 2010). Some felt that very few new people were drawn into action through social media. Interviewees who worked with youth and Indigenous communities highlighted that social media played a significant role in bringing new people into conversations online, and that this frequently translated into activism and community mobilization offline.

Depth versus breadth

Interviews revealed contested notions and experiences about whether social media and technology are weak or strong connectors for individuals and communities, and whether it was better to connect with more people, versus fewer people more deeply. Most respondents interviewed felt that online and social media provided weak or “surface-level” connectors – or a way to engage with those who were already involved in the same circle of information. A couple of respondents felt that this brought nothing new to the table, but provided a platform for information sharing amongst nonprofits and organizers, keeping everyone aware of events, issues and activities and “allowing knowledge transfer on overlapping and interconnected issues” (Interview #6, 2014). For nonprofits, some interview respondents noted that having greater access to quick, easy-to-read information on interconnected issues and services related to theirs was a valuable way to stay informed, and to broaden their perspective and professional networks.



Some felt that social media allows organizations to reach new communities and to engage a wider audience. Further, similar to Mansfield (2012), many interview respondents felt that social media and online users are quite erratic, that the platforms, issues and technology that are used change and “people move on quickly online” (Interview #4, 2014). Further, in relation to low-income and marginalized populations, some of these social networks were highlighted as particularly “fragile and vulnerable to change” (Interview #7, 2014). According to McCabe et al. (2013), the popular notion that “some [vulnerable] communities look after their own” was somewhat misleading and did not reflect contemporary networks and communications (McCabe et al., 2013). That is to say that social media spaces are, again, not a solution to the very real needs of communities.

On the flip side, some respondents felt that social media can provide a platform for engagement – that is, deeper conversation and connection – especially for youth (Interview #10, 2014). With respect to youth, social media and technology, one respondent said that “they were born out there and if you are under 25, you do all your organizing online” (Interview #10, 2014). Another noted the importance of new media for “building new leaders,” as they develop their skills using online tools to find their political voice and engage (Interview #6, 2014). Campbell Salazar (2010) highlighted the importance of youth using their phones for organizing with other youth; they shared the critical value that their phones played in their activism. Skelton and Valentine (2003) also looked at youth engagement and activism online and argued that there is a need to focus on, and look for, “what they are doing,” rather than assuming that new ways of interacting online are inactive or apolitical.

Breaking down barriers

Some interview respondents noted that the voices with a public forum online, from blogs to social media spaces, are more diverse; and it is no longer just journalists who can make news – anyone can. This breaks down barriers for many individuals who have not



been able to share their stories, experiences and opinions in a public forum before. According to most interview respondents, this can be empowering, particularly for those whose stories and experiences are frequently marginalized and forgotten. According to Mitra and Watts (2002), technology and social media have provided a “resuscitation of voice” for communities and marginalized individuals, as they redefine the possibilities of the Internet and online communications to envision a discursive space where communities are central in dialogue (as cited by Rheingold, 2008). Coleman (1990) also similarly discussed the social theory of citizenship in relation to online spaces, and argues that entry into these public spheres is cheaper and cultivates a culture of democratic participation. Interviews for this research revealed differences of opinion about the ways in which social media can bring in, provide voice and empower marginalized and low-income communities. Some felt that these platforms are a rich site for empowerment and critical engagement – with a “diversity of people engaged in a conversation online versus in person [...] would this ever happen?” (Interview #10, 2014). Conversely, others felt that many social media spaces are not bringing in new voices and discussion – instead providing an amplified platform for those who are already online and engaging.

Respondents reported that they saw creating and broadcasting media as particularly valuable to youth, but that many other marginalized groups could not necessarily put in as much time into the creation of content since the technology platforms were often newer and less intuitive. Further, as Mansfield (2012) noted, “class and race issues play out in social media just as they do in real life,” highlighting the ways in which social media dialogue can be exclusionary and prejudiced. Greenhow (2009) notes that some social media engagement can actually provide “yet another leg up” to more privileged groups while further disadvantaging others. Some sites and tools appear to cater to diverse audiences and “others attract people based on common language or shared racial, sexual, religious, or nationality-based identities” (boyd & Ellison, 2007). This was not mentioned in the interviews as a problem in relation to empowerment and voice for individuals using social media itself, but instead, as an ethical challenge for nonprofits to monitor and manage social media platforms (Interview #3, 2014). According to a num-



ber of respondents, conversations online are often more critical and less-mediated than face-to-face and other engagement spaces. This creates potential for tremendously toxic conversations, transformative engagement and everything in between. In conversations about a controversial topic, individuals can have open communications and disagreement online. When this is happening and community organizers and nonprofits are participating, or these conversations are taking place on their platforms and sites, those in positions of responsibility have to quickly step in and mediate. According to nearly all interview participants, this can take a considerable amount of time and energy – “waking up in the morning to hateful comments on your post” and needing to deal with this and the subsequent feelings within communities (Interview #3, 2014).

Risk-taking and trust

The challenges with bureaucracy in relation to capacity and social media came up frequently in the interviews. The more rigid and bureaucratic an organization, the slower they tend to respond and to post. Moreover, they are usually the late-adopters of newer forms of technology and are “often many steps behind” (Interview #3, 2014). Nonprofits – and in particular, service organizations – have often “fallen behind the people they serve in their modes of communication” (Taylor, 2011). According to one respondent, nonprofit managers and leaders “forget everything they know how to do” when it comes to strategically considering the value, challenges and opportunities for using social media (Interview #4, 2014). As in Taylor’s (2011) research, interviews highlighted that Directors and leaders in nonprofits often do not have the knowledge or the time to strategically evaluate how social media could support their mission, let alone work and begin “to create protocols for social media use, and to begin to experiment with the new media forms” (Taylor, 2011). While not always strategic per se, according to Mansfield (2012), “early adoption [of social media use] in and of itself has evolved into a powerful strategy during the rise of social media. Those who do something first tend to do it best simply because they are doing it.” Today, this may be less relevant, with the variety of tools and platforms available and the rising use of social media and other technologies;



perhaps nonprofits cannot rely only on the trailblazer theory to move into social media engagement.

Mansfield (2012) also encourages organizations to “approach social media with caution and practicality,” stressing that strategic consideration about the risks and potential implications of online engagement must be considered carefully. Risks and potential implications include those that impact nonprofits themselves, such as developing ineffective social media campaigns and activities that add little value to the organization and mission, as well as the very real risks social media can have for low-income and marginalized individuals, such as disclosure of personal information. Social media engagement is unique to other nonprofit communication practices, making training, support and overall capacity important components to effective social media engagement.

Some interview respondents highlighted the overall need for nonprofits to “let go” and allow risks to be taken and to explore new areas (Interview #4, 2014). In reflecting on their own social media experience, the Humane Society of the United States shares how they have “done so many things in social media that flopped,” and how they didn’t get discouraged; instead, they “learned from mistakes and next time came back even stronger” (as quoted by Mansfield, 2012). A number of respondents emphasized that without official permission, it is often individuals within nonprofit organizations who take risks to begin to use social media for the organization on a particular project (Interview #3, 2014). This was cited by some respondents as a catalyst to building online engagement strategies – though a process of taking risks and making mistakes. Another respondent noted that this meant that strategy was not effectively employed in these instances, that this is not an ideal way to start using social media because “it was messy” (Interview #4, 2014). However, he also emphasized that the rigidity and bureaucracy of many organizations result in a climate where “to get anything done, sometimes you have to go out on your own” (Interview #4, 2014).



A number of respondents highlighted the utmost importance of trust when taking the risk to engage online using social media. Specifically, trust for the staff doing this work was emphasized; without this, the staff would not be authentic and would not engage online in meaningful ways. One respondent noted that this trust doesn't just appear overnight, that policies and expectations must be set out and made clear from the organization (Interview #1, 2014). However, they added that the organization must also "let go to a certain extent" and allow staff to do their work and deal with any support needs and repercussions as they arise (Interview #1, 2014). These policies must be flexible enough to allow staff and volunteers to develop their skills and processes to build social media capacity (Dreyer., et al, 2009).

Usefulness of social media data

Interview respondents felt that social media, even when used minimally within organizations, provides useable data for organizations to track their engagement and outreach and, ideally, to develop evaluation tools from. Even just "likes" or "shares" on Facebook give an organization something to measure and reflect how a particular issue may be perceived by a particular community or stakeholder group. This can be of significant value to nonprofits as it offers a simple data tool for assessing impact. One respondent asserted that this is "a start to doing better engagement" with communities, and a better way to evaluate their efforts in social media engagement and other services (Interview #3, 2014).

In their book, *Measuring the Networked Nonprofit*, Kanter and Delahaye Paine (2012) highlight the importance of using social networks and the technology of social media to extend capability and effectiveness in nonprofit evaluation. However, contrary to many of the interview respondents, they encourage focusing on results, not necessarily on the tools used. Similarly, *The Conclave* (2013) suggests measuring engagement and conversation in relation to overall organizational goals and objectives, instead of focusing on activities and clicks. According to Delahaye Paine's (2011) book, there are three



main reasons why engagement is critical for organizations – building relationships, promoting brand, and improving products and services. Delahaye Paine outlines hierarchical levels of online engagement, highlighting the importance of measuring and evaluating levels of engagement to help inform strategic direction and decision-making in the organization (Delahaye Paine, 2011).

Effective data collection and evaluation of any strategies and tools implemented – whether using technology or not – should be similar and complimentary to nonprofits’ overall strategies for evaluation and impact measurement. Respondents noted that there are risks with this data as well, as there is more data being collected and stored by organizations – especially in an online password-protected environment – about how to protect the privacy of individuals. Many respondents felt that social media and the Internet offer simple data solutions for evaluating the overall work of the nonprofit, campaign or community engagement efforts. However, knowing what you want to get out of the data and how you will get this is equally important in developing a strategy for using social media data effectively. This frequently relates back to capacity for nonprofits, as it takes resources and time to perform effective evaluations – something that many nonprofits are strapped for. Mansfield (2012) highlighted how tracking social media and evaluating it can help organizations evolve and cater to their messaging and strategy, sharing messages and information that people want to listen to and engage with. A number of interviews revealed the challenges that organizations already face with respect to measuring and reporting on activities and impact. Further, they added that funders and organizations have not figured out how to evaluate engagement, or service and information provision online or use of social media. At a very basic level, funders tend to want to track in-person interactions and official client-provider relationships. Social media is informal and offers new opportunities for nonprofits to engage, provide services and mobilize. But as one respondent noted, “we haven’t figured out how and what to report” (Interview #5, 2014).

Filtering out the noise



“There’s a lot of nothing on the Internet” (Interview #9, 2014). Social media platforms offer a venue for important engagement and useless broadcast and information – as well as everything in between. Although less-expensive than face-to-face communication, social media is “characterised by a higher proportion of irrelevant information;” this requires a unique set of time and skills to cope (McCabe et al., 2013). According to key informants, many people – young people especially – understand how to filter through this, and to find and engage in interesting conversations and media. However, in a context where “a bad hair day is just as likely to be tweeted about as something newsworthy,” understanding these media platforms and learning how to filter through them for meaning is critical (Interview #8, 2014). Furthermore, other respondents noted that what you see within any online platform is limited and aggregated. One respondent said that it is not only important to filter the information you see online and to be selective about what you engage in, but also to seek out other spaces for news and information where it is not automatically tailored to you. Otherwise, social media platforms become a space to engage with like-minded people – one “where we are all having the same conversation all at once, just re-tweeting and re-posting each others’ stuff” (Interview #9, 2014).

Adding value

Interviews revealed that social media knowledge for nonprofits includes more than just understanding how to use tools and platforms, but also to understand the amount of information and the (un)likelihood of your content going viral – “you need to work hard and say something different and interesting to get online users to listen” (Interview #7, 2014), noting that there needs to be added-value, by providing access to resources and information that people have not necessarily heard about. Respondents highlighted how creating content, versus curating content is most effective online, but takes additional human resources and skills for production and broadcasting. In addition to the additional resources that need to be put towards developing and managing online content and engagement, respondents also identified a frequent expectation that whatever you and your organization produce will go viral, with very little understanding that “very few things go viral” (Interview #8, 2014). With this, it is very important for nonprofits to un-



derstand how social media functions and to help manage expectations about what social media engagement can look like and what kind of impact it can have. This theme arose frequently in interviews, as interview respondents said that nonprofits and community organizers should not only be prepared for the possibility that whatever they produce will go nowhere online, but also for potentially negative repercussions. According to one respondent, “if they are not prepared for a crisis, don’t do it” (Interview #9, 2014). This was in reference to the potential for a social media campaign, or even simply a story, post, tweet or comment to garner significant negative attention. When this happens – which a number of interview respondents noted that it will – nonprofits need to be prepared to handle this appropriately. In order to do so, they need to develop skills and processes for managing any issues online.

Authenticity and voice

The importance of authenticity and ‘voice’ were themes that emerged in all interviews and throughout the literature. According to Rheingold (2008), “voice” is the “unique style of personal expression that distinguishes one’s communications from those of others.” This genuineness of “voice” is also called “authenticity”, generally describing something real, original, sincere, and not fake (Gilmore & Pine, 2007). This is an important component to effective online engagement and public participation. Interviewees highlighted the importance of creating and sharing media about their own communities in authentic and meaningful ways. For nonprofits, respondents emphasized that any attempts to use social media from the organization’s perspective would be met with minimal success. “There needs to be a person behind any social media campaign,” which must be authentic and meaningful (Interview #3, 2014).

Using “voice” effectively and genuinely on social media has been found to promote more positive relationships with stakeholders as well as positive word-of-mouth communication (Park & Lee, 2011). Authenticity and voice are about “consciously engaging with an active public rather than broadcasting to a passive audience,” considered key elements to online and social media dialogue (Rheingold, 2008). Mansfield (2012) em-



phasized the importance of authenticity and voice and the uniqueness of social media engagement, asserting that “community building comes first and marketing second.” One respondent stated that using “social media in in-authentic ways is meaningless” (Interview #3, 2014). Others suggested that top-down, funder-directed or compulsory social media engagement “with too many rules and restrictions” would be ineffective (Interview #8, 2014). Indeed, “a funder telling you what to do, and how to do it online is perhaps defeating the point” of social media and the potential for it to be used as a community engagement tool (Interview #10, 2014). These responses reflect some of the current pressures that nonprofits are facing to adopt new technologies and social media strategies, and the challenges this presents when they are dictated and developed externally, rather than evolving organically from within organizations and communities.

Mansfield (2014) suggests centering a campaign around a cause, rather than the nonprofits’ name. Interview respondents suggested that the more personal the interactions and content on social media, the more likely that it would be successful. This included nonprofit leaders harnessing social media themselves, but speaking from their organization’s perspective, as well as individual community members sharing personal narratives and experiences online through social media. Overall, throughout interviews it was clear that most respondents felt that having a connection-to and caring about an issue or cause, above all, was critical to success with social media engagement. Important in this discussion – and a challenge that many nonprofits said that they grapple with – is the question of speaking for a community, and the benefits of having media and discussion coming from communities for communities. This too, however, presents some challenges, as interviews revealed that there is a great deal of diversity within any community and the idea of speaking on behalf of a community has a homogenizing and problematic effect. Some respondents suggested that these issues are addressed online by communities themselves through social media engagement, as individuals challenged one another online and even discussed the meaning of community and representation (Interview #10, 2014). Another respondent suggested that social media strategies, and the capacity to employ them (e.g., grants and funding), support the abil-



ity for nonprofits to financially support low-income and marginalized community members themselves to develop content for social media and to run social media initiatives.

Ethics and privacy

A final theme that emerged from interviews, as well as across the literature, is the ethical challenges and privacy considerations for nonprofits using social media to engage their communities – especially with low-income and vulnerable populations. Interviews revealed challenges that have the potential for significant legal, social or economic repercussions, such as individuals disclosing personal information online. These included challenges such as individuals disclosing their own or someone else’s HIV or immigration status, and the repercussions of this in a fast-paced, public forum, where “taking anything off the web is next to impossible” (Interview #10, 2014). Similarly, interview respondents shared that personal narratives, which can be empowering to one individual, can have the opposite effect on another – potentially disclosing activities and stories that can negatively impact their lives (Interview #9, 2014). Individuals sharing their own experiences at times create legal, moral and ethical issues once they are in the public domain (e.g., survivors of trauma and abuse wanting to share their stories online) (Interview #10, 2014). One respondent noted, in particular, the challenge of youth regretting “quick decisions to post something online,” potentially leading to long-term negative repercussions (Interview #10, 2014). Respondents stressed that nonprofits and organizers need to think through these issues carefully and have plans in place for dealing with any privacy and ethical concerns for clients and community. Two respondents highlighted how nonprofits should have non-disclosure policies as part of their overall organizational policies, but that these can be expanded to include specific examples for social media safety, privacy and ethics.

While Bowen (2013) set forth ethical guidelines for social media use from an organizational perspective, including “be fair and prudent,” “avoid deception,” “maintain dignity and respect,” and “eschew secrecy,” respondents highlighted that to impart these guidelines onto and within the community spaces where dialogues are taking place, with or



without a common ethical baseline, is next to impossible. What nonprofits need to think strategically about, according to one respondent, is the role they play in mediating and responding to online information and, “perhaps most importantly, when and how to move conversations to appropriate channels elsewhere” (Interview #7, 2014). In the *Ethical Practice of Social Media in Public Relations*, DiStaso and Bortree (2014) compile studies and perspectives in an attempt to tackle social media and ethics. A major theme throughout the book is the importance and use of strategy as a “social compass” to develop ethical activities and engagement (DiStaso & Bortree, 2014; Gallicano et al., 2014).

For service providers and nonprofits engaging in an online environment, maintaining the privacy of individuals and communities is critical. According to Mansfield (2012), the privacy of clients, supporters or constituents is paramount. She emphasizes that privacy is still possible, but organizations must take the steps to protect it. One interview demonstrated how privacy concerns and respondents’ lack of knowledge about how to navigate the anti-spam laws around engagement have prevented them from moving into social media and online spaces more actively for fear of legal recourse (Interview #8, 2014). She noted that, for smaller nonprofits, the current laws are difficult to understand and developing new procedures for gathering contact details and delivering information to clients and communities can be difficult (Interview #8, 2014). Finally, a number of respondents pointed out the challenges of dealing with the amount of data they now have within their organizations and how to protect it – as well as think about how to use it for measurement and advocacy (Interview #4, 2014). Without proper information, training and capacity-building, some interview respondents noted that some nonprofits are simply leaving the data alone, rather than using it for evaluation.



Recommendations

The following key recommendations highlight how social media strategies can be developed, supported and planned to further an organizations' mission, reach and impact for community development and social change. As with any strategy, it must be contextually specific and relevant to the community organizations, their constituents, and clients and communities' needs and experiences. The following recommendations are not exhaustive. Rather, they are intended to help start conversations within and between nonprofits, government funders and communities about different strategic ways that communities and community organizations can consider using social media to support community development, and to engage and empower communities. Recommendations focus on community organizers and nonprofits, with subsequent recommendations on creating a supportive environment for the strategic use of social media addressed to funders, policy makers and researcher.

Community Organizers and Nonprofits

Strategic planning and development is critical for any organization. For nonprofits and community organizations considering the benefits of social media engagement with marginalized and low-income communities, there are additional aspects of strategic planning. This research reveals that, wherever possible, organizational strategic planning should be the starting point before developing any social media campaigns and engaging online, and that social media strategies should be a part of the organization, not a stand-alone strand of the organization with one person doing all of the work. While risk and trial and error are a part of using social media, as these are new spaces where nonprofits and others are constantly learning, this research supports a more strategic and embedded approach to social media engagement. Strategic planning about social media should fit into overall planning and strategy related to the mission and goals of the organization. Some planning and development ensures that organizations are thinking through goals, tactics and approaches, ethical and privacy issues, data manage-



ment and evaluation, capacity challenges, training, content creation and any appropriate policies that need to be put into place. Without over-bureaucratizing, nonprofits need to have these discussions before delving into new areas of work. Strategic planning should help to develop social media activities – when appropriate – that are culturally and contextually relevant and ethical, as well as sustainable for the organization’s capacity.

- **Strategic planning tools.** Tools and facilitators can help organizations with strategic planning. Consider using a free online tool developed to help organizations determine their readiness to use social media and new technology, such as the INCLUSO Game. It has four key strategic themes – goals, activities, tools and sustainability – and is used within organizations to “explore how social technology might be used for social benefit, in a context that’s relevant to them and their work” using a mix of collaboration and competition (INCLUSO, 2014).
- **Mission and strategy, then tools and activities.** Nonprofits need to think about their goals, the context in which they work, and the communities they serve. Social media strategies are often very simple – and can be very effective. For example, using text messaging to reach and engage vulnerable populations may be an excellent strategic approach. And it will require very different skills and have very different implications than an online presence. Nonprofits, especially those with significant capacity constraints, must think carefully about their mission and strategic objectives in order to develop the best tools and activities to respond to community needs.
- **Develop service and support policies and expectations.** Set out policies to guide, rather than dictate, social media engagement for staff and volunteers. Integrate this into other guides and policies, because the tool (social media) will change, but the underlying principles of service and core expectations should not. Clear expectations will enable management to trust staff and “let go” so that that bureaucracy does not block the ability to engage in a fast-paced online environment.



- **Build into funding, where possible.** Consider partial-grant funding to pay low-income or marginalized community members to produce online content. This helps ensure that the perspectives and voices of communities are central to content and dialogue, as well as valuing their contribution through remuneration.
- **Support capacity building.** Consider the potential of social media and other technology platforms to support the organization's internal training, communication and capacity building. Nonprofits that are better-connected build resilience within the organization, and support a more effective strategic planning process.
- **Content and technical skills expertise.** Nonprofits need to support and develop the skills of staff and volunteers who will be involved with digital and social media engagement. Both content expertise and technical communications knowledge are the skill sets needed for effective online outreach, engagement and movement-building.
- **Ethics and privacy are at the forefront.** The tactics and tools for engaging with marginalized and low-income individuals, families and communities should consider any potential privacy risks. Non-disclosure policies, as well as staff and volunteer safety policies can be developed – or expanded from existing organizational policies. Carefully explore the boundaries of responsibility and accountability online.
- **Data and evaluation.** Social media offer a rich amount of data and opportunities to engage with communities and evaluate the effectiveness of services, supports and mobilizing. Take the time to develop plans for gathering data and evaluating services, and online engagement strategies. Such planning should be complementary to other organizational activities and reporting, but will inevitably be unique. Evaluation should be based on the organizational goals and the strategy of tools and tactics developed. Counting “likes” or followers does not say much about reaching targets around service delivery – though they might from a purely marketing and outreach perspective. However, gathering data is meaningless if it doesn't get used. Try to test ways of measuring outcomes and impacts. Ensure there are safety mechanisms to protect data and any confidential information.



- **Coordinate information and support channels.** Think about how social media fits into other communication channels within your organization. Then, set up appropriate mechanisms for moving people from one channel to another. This should support organizational privacy policies, ensuring that if a channel is used inappropriately (i.e., complaint or personal disclosure online), staff can quickly communicate in another space to support and solve these issues privately.
- **Learn from mistakes.** Continue to evolve and learn from the successes and failures of social media and other strategic initiatives. Share the successes and failures of initiatives, and develop plans to improve online and social media services, engagement and activities to best support organizational goals and mission.
- **Use existing tools and outlets.** Consider the value of using existing news conduits to get into their social media spaces. For example, writing an article for a media outlet that has a social media presence may have a greater news and engagement reach than trying to develop it in-house. Consider the value of adding new systems and online spaces, versus getting into existing spaces.
- **Each social media tool is unique.** Understand that each social media and digital engagement platform is unique – from its purpose, followers, how media is shared, what is shared and what are expectations. There is a unique culture for each tool (Pasek et al., 2009). While efficiency tools exist that allow organizations to share media and updates to a number of platforms at once, they ignore the uniqueness of each tool and how to use them effectively.
- **Media literacy training and support.** Consider providing technology and social media support to low-income individuals and communities who might benefit from this. With ever-more information, services, communications and complex systems moving online, there is a danger that nonprofits and others moving onto online platforms, engagement and service delivery, could further marginalize vulnerable individuals, families and communities.

Supportive Environment



Funders, policies and research can facilitate and support nonprofits to effectively develop sustainable and relevant social media and technology strategies and capacity to support and engage low-income and marginalized communities. Funders should carefully consider the value of social media and technology use for various different organizations and the contexts within which they work, as related to each one's strategy and mission. Social media is not a 'silver bullet.' Nonetheless, funders can help nonprofits understand and consider the various elements involved with engaging low-income and marginalized populations through social media and other strategic tools. They can encourage conversations, dialogue and strategic development. Funders can also financially support strategic planning and organizational development processes for nonprofits. This can also include funding computer access, computer training, Internet literacy and social media training for nonprofit staff and volunteers. Building the capacity of nonprofits is a necessary foundation to supporting and funding other strategic programs, services and interventions.

Funders need to develop new ways to measure the work of nonprofits using technology to engage and provide services. Currently, most evaluation and measurement tools are inappropriate for nonprofits providing services and information online and using social media. Further, who nonprofits can "count" in their reporting and evaluation does not reflect how many individuals and communities are seeking online information, engagement and support, as well as how some nonprofits are providing it. Funders need to have honest conversations with nonprofits about how to gather data, measure and report their activities and impact. Funders can help lead these conversations and develop and test flexible models that can adapt to unique and fast-paced online environments.

Technology, social media and online communications are increasingly used by nonprofits for engagement, service provision and mobilization. As such, there are policy challenges related to social media that must be addressed. In Canada, the digital divide is a growing challenge. Many nonprofits and community organizers work with marginalized and low-income individuals, many of whom struggle to access the Internet, and the ser-



vices, supports and networks that are increasingly online. Policies that help to minimize the digital divide, as well as support digital literacy training, would help enable individuals and communities to access resources and opportunities. Nonprofits and community organizers would be better able to connect with marginalized and low-income communities through the increasingly common and utilized social media and online engagement spaces. There is need for policy-relevant research on social media and digital engagement, as well as on the digital divide and the impacts of this on communities in Canada. Further research could make a significant contribution in social media and technology studies and nonprofits by exploring the potential of social media data and evaluation.



Moving Forward Strategically

Nonprofits and other community organizations have expressed considerable interest in using social media to effectively reach and engage low-income and marginalized populations. Many nonprofits are trying and testing models for outreach and engagement, with varying levels of success depending on the communities they serve, and their organizational capacity and culture. This research explored the social media literature and practical experiences of a small group of Toronto-based community organizers and social media experts to uncover some common themes, challenges and key considerations for nonprofit organizations engaging with low-income and marginalized populations.

This research revealed a number of challenges and opportunities for using social media within nonprofits for community engagement, development and mobilization purposes. The most prevalent theme revealed is that social media, like any other tool or tactic, can be a way of supporting strategic goals and objectives for an organization or campaign. As highlighted in this research, social media is not a solution – it's a strategy. This report offers key considerations for utilizing social media as a strategy, including lessons learned and challenges drawn from the literature and a series of community interviews. Capacity is critical for nonprofits' ability to engage effectively using social media strategies. Any social media strategy developed must consider the organization's capacity to sustain it. Further, there is no one-size-fits-all model for social media engagement. This research shows that how diverse communities access, use and engage with social media varies significantly, and that nonprofits must understand this in order to consider the development of relevant social media tools. Through this report, nonprofits and other organizations engaged in community development, service and social change work with low-income and marginalized populations have a framework to think about and use these – and other – strategies more effectively.



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Appendices

Appendix A: Consent Form



Consent Form

Title: Social Media Strategies for Low-Income Communities, Capstone Project (PANL 5008)

Date of ethics clearance: September 4, 2014

Ethics Clearance for the Collection of Data Expires: December 1, 2014

I _____, choose to participate in a study on examples of new media applications and strategies that have been used to outreach and engage immigrant and/or low-income populations in community and economic development projects. This study aims to gather practical knowledge and examples of social media strategies and interventions that can be used to engage low-income and/or immigrant populations. **The researcher for this study is Sophia Lowe, candidate in the Masters of Philanthropy and Nonprofit Leadership program at Carleton University.** She is working under the supervision of Professor Paloma Raggo in the School of Public Policy and Administration.

This study involves one 60 minute interview that can be completed in person or by telephone. The researcher will take notes during the interview. All notes will be stored in a locked filing cabinet that only the researcher will have access to. Upon completion of the study, these notes will be destroyed. Your identity will be kept anonymous in the research process and in the final report. Any information or markers that could disclose your identity will not be included in the report.

As this project will ask you about your knowledge, experience and reflections on social media projects that engage newcomer and low-income community members. The risks to you in participation in this research are minimal. You may experience discomfort discussing any barriers or challenges with regards to these initiatives or discomfort sharing critical feedback about these strategies.

Participating in this study is voluntary. There are no costs to you to participate in this study. Your choice of whether or not to participate will not influence your future relations



with Carleton University or the Metcalf Foundation. If you decide to participate, you are free to withdraw your consent and to stop your participation in the study at any time, for any reason, up until November 2, 2014. You can withdraw by phoning or emailing the researcher or the research supervisor. If you withdraw from the study, all information you have provided will be immediately destroyed. At any particular point in the study, you may refuse to answer any particular question or stop participation altogether.

The findings from this research will be used to write a research report that will be shared and presented in-person and by webinar to the Metcalf Foundation and to Carleton University. The research report may be published and distributed by the Metcalf Foundation and Carleton University in the future. If you would like a copy of the finished research report, you are invited to contact the researcher to request an electronic copy, which will be provided to you.

This project was reviewed by the Carleton University Research Ethics Board, which provided clearance to carry out the research. Should you have questions or concerns related to your involvement in this research, please contact:

REB contact information:

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Signature of participant

Date

Signature of researcher

Date





Appendix B: Interview Guide

Semi-Structured Interview Guides

Topic: Engaging Social Media Strategies for Low-Income Communities

Service Providers

1. How long have you been working at this organization and in what capacity?
2. Can you tell me about the social media project/initiative that you have been involved with?
3. When did you get involved with this project?
4. How did the idea for this social media strategy/project develop?
5. Who is this targeted for, what is it trying to address?
6. What are the main objectives?
7. Are there any legal, ethical, political or other challenges with regards to using this online platform/project (e.g. privacy)?
8. What have been some of the successes of this project? What are some of its limitations?
9. Thinking about other projects geared towards low-income and newcomer populations, do you have any lessons learned about social media and new media projects to share?
10. In a couple of years, where would you like to see this initiative?
11. In the future, what would you like to see other community and social development projects doing similarly or different to better engage with low-income and newcomer populations?
12. Do you think social media and new media can help “traditional community development projects” scale up? If so, how? If not, why not?
13. Do you know of any other examples of social media or new media initiatives that are being used to better engage with newcomer and/or low-income populations?
14. Is there anything that I have missed that you would like to add? Do you have any questions for me?