COMMUNICATIONS, ENGAGING THE PUBLIC AND SOCIAL MEDIA

A STANDARDS FOR EXCELLENCE® EDUCATIONAL RESOURCE BULLETIN

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PREAMBLE

America’s nonprofit sector serves the public interest and plays an essential role in our society and economy. Hard at work strengthening communities across the nation, nonprofits enrich our lives in a variety of ways by creating a broad array of benefits to society in fields such as charitable, religious, scientific, economic, health, cultural, civil rights, environment, and education.

Public investment and confidence drive the success of nonprofit organizations. Individuals, corporations, foundations, and federal, state, and local governments add value to the services that nonprofits provide by investing time, resources, and funds.

The Standards for Excellence Institute aims to raise the level of accountability, transparency, and effectiveness of all nonprofit organizations to foster excellence and inspire trust. The Standards for Excellence code (Standards, or code) provides a framework and step-by-step guidelines to achieve a well-managed and responsibly governed organization.

The code builds upon the legal foundations of nonprofit management, governance, and operations to embrace fundamental values such as honesty, integrity, fairness, respect, trust, compassion, responsibility, and transparency. The code consists of six Guiding Principles in 27 topic areas with specific performance benchmarks that characterize effective, ethical, and accountable organizations. The Institute helps the nonprofit sector operate in accordance with the Standards for Excellence code by providing educational resources, assistance, and a voluntary accreditation process.

The Standards for Excellence Institute encourages all nonprofit organizations to adopt the Guiding Principles of the Standards for Excellence code. By implementing the performance benchmarks in the code, nonprofit organizations will meet the highest ethical standards for effective service in the public interest.

STANDARDS FOR EXCELLENCE - GUIDING PRINCIPLES

I. MISSION, STRATEGY, and EVALUATION
Guiding Principle: Nonprofits are founded for the public good and operate to accomplish a stated purpose through specific program activities. A nonprofit should have a well-defined mission, and its programs should effectively and efficiently work toward achieving that mission. Nonprofits have an obligation to ensure program effectiveness and to devote the resources of the organization to achieving its stated purpose.

II. LEADERSHIP: BOARD, STAFF, and VOLUNTEERS
Guiding Principle: Nonprofits depend upon effective leadership to successfully enact their missions and programs. Effective leadership consists of a partnership between the board and management, each of which plays an essential role. Understanding and negotiating these shared and complex elements of leadership is essential to the organization’s success. A nonprofit’s employees and volunteers are fundamental to its ability to achieve its mission.

Board members are in a position of trust to ensure that resources are used to carry out the mission of the organization. An organization’s board leadership should consist of volunteers who are committed to the mission and who demonstrate an understanding of the community served. An effective nonprofit board should determine the mission of the organization, establish management policies and procedures, assure that adequate human and financial resources are available, and actively monitor the organization’s allocation of resources to effectively and efficiently fulfill its mission.

Nonprofits should also have executive leadership which carries out the day-to-day operations of the organization, ensures financial and organizational sustainability, and provides adequate information to the board of directors. An organization’s human resource policies should address both paid employees and volunteers and should be fair, establish clear expectations, and provide meaningful and effective performance evaluation.

III. LEGAL COMPLIANCE and ETHICS
Guiding Principle: Nonprofits enjoy the public’s trust, and therefore must comply with a diverse array of legal and regulatory requirements. Organizations should conduct periodic reviews to address regulatory and fiduciary
concerns. One of a leadership’s fundamental responsibilities is to ensure that the organization governs and operates in an ethical and legal manner. Fostering exemplary conduct is one of the most effective means of developing internal and external trust as well as preventing misconduct. Moreover, to honor the trust that the public has given them, nonprofits have an obligation to go beyond legal requirements and embrace the highest ethical practices. Nonprofit board, staff, and volunteers must act in the best interest of the organization, rather than in furtherance of personal interests or the interests of third parties. A nonprofit should have policies in place, and should routinely and systematically implement those policies, to prevent actual, potential, or perceived conflicts of interest. Ethics and compliance reinforce each other.

IV. FINANCE and OPERATIONS
Guiding Principle: Nonprofits should have sound financial and operational systems in place and should ensure that accurate records are kept. The organization's financial and nonfinancial resources must be used in furtherance of tax-exempt purposes. Organizations should conduct periodic reviews to address accuracy and transparency of financial and operational reporting, and safeguards to protect the integrity of the reporting systems.

V. RESOURCE DEVELOPMENT
Guiding Principle: The responsibility for resource development is shared by the board and staff. Nonprofit organizations depend on an array of sources of financial support. An organization's resource development program should be maintained on a foundation of truthfulness and responsible stewardship. Its resource development policies should be consistent with its mission, compatible with its organizational capacity, and respectful of the interests of donors, prospective donors, and others providing resources to the organization.

VI. PUBLIC AWARENESS, ENGAGEMENT, and ADVOCACY
Guiding Principle: Nonprofits should represent the interests of the people they serve through public education and public policy advocacy, as well as by encouraging board members, staff, volunteers, and stakeholders to participate in the public affairs of the community. When appropriate to advance the organization’s mission, nonprofits should engage in promoting public participation in community affairs and elections. As such, they should communicate in an effective manner to educate, inform, and engage the public.

ABOUT THE STANDARDS FOR EXCELLENCE INSTITUTE
The Standards for Excellence Institute is a national initiative established to promote the highest standards of ethics and accountability in nonprofit governance, management and operations, and to facilitate adherence to those standards by all nonprofit organizations. The Institute uses as a vehicle the Standards for Excellence program, a system of nonprofit sector industry self-regulation originated by the Maryland Association of Nonprofit Organizations and currently replicated by licensed partners in Alabama, Central Virginia, Colorado Springs, Delaware, Ohio, Oklahoma, Pennsylvania, and West Virginia. The program is also being offered to chapters of The Arc nationwide through The Arc of the United States, to the American Nurses Association, and to Catholic nonprofit organizations nationwide through the National Leadership Roundtable on Church Management.

The centerpiece of the Institute’s program is the Standards for Excellence: An Ethics and Accountability Code for the Nonprofit Sector. The Institute also makes available to member organizations a comprehensive system of educational tools to enable individual nonprofit organizations to improve their governance and management practices. Standards for Excellence accreditation is available to individual organizations through a rigorous peer review process in selected locations and nationwide through the Standards for Excellence Institute.

For more information about joining the Standards for Excellence Institute or to obtain additional copies of the booklet or educational resource packets visit our website at www.standardsforexcellenceinstitute.org
Topical Bulletin: Communications, Engaging the Public and Social Media

As the Standards for Excellence: An Ethics and Accountability Code for the Nonprofit Sector states:

Communications, Engaging the Public and Social Media

A nonprofit should have written, board approved administrative policies that are periodically reviewed by the board. At a minimum, these policies should address issues such as crisis and disaster planning, information, communications, and social media.

Nonprofits should provide a meaningful opportunity for the public to communicate with a representative of the organization.

Nonprofits should assure that any educational or advocacy information provided to the media and policy makers, or distributed broadly, is factually accurate and provides sufficient contextual information to be understood.

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<th>✓ KEY PHRASE</th>
<th>COMMUNICATION</th>
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<td>✓</td>
<td>The imparting or interchange of thoughts, opinions, or information by speech, writing, signs and symbols.</td>
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Communication is a comprehensive component of any organization’s infrastructure, involving and impacting all aspects of operations and programming. It is in many ways just as important as the effective execution of mission-based initiatives. Promotional, messaging, publicity, engagement, and opinion-shaping influences can determine the ultimate success or failure of those initiatives.

Benefits of establishing communications policies and a communications plan:

- Increases public awareness of the organization’s mission and programs
- Widens the organization’s sphere of influence
- Ensures consistency in messaging and public image
- Exercises control over how the organization is portrayed to the public
- Builds synergy and teamwork by involving every component of the organization
- Helps streamline organizational strategic planning, prioritizing, and actions
How to Begin
If there is a member of the board with expertise in communications, he or she should work with the executive director to develop a comprehensive communications policy. In the absence of such board expertise, the executive director should consult with a communications expert or several experts – for example, a human resources expert for internal communications and a social media expert for external communications – and involve key staff in the development of this policy. Once the policy has been approved by the board, the staff should then produce a communications plan to implement that policy, under the guidance of executive leadership and also subject to review and approval by the board of directors.

The Communications Policy
An organization’s communications policy should provide clear guidance for each aspect of its internal and external communications. The key elements of a communications policy are:

- **Statement of Purpose** – The policy’s goals are (1) to ensure consistent projection of the most positive, professional, and accurate organizational image to the public; and (2) to facilitate effective, professional, and respectful communications between and among the board, organizational management, and the staff.

- **Public and Policy Relations** – Public relations communications are more specific to the organization’s interactions with the media, legislative or other policy-making entities, organizational partners, and entities or individuals with opposing missions. These components of the policy establish specific media contacts within the organization; describe if, how, and in what media the organization can advertise; and may even contain position or briefing papers on specific key topics related to the organization’s mission and values.

- **Internal Communications** – Internal communications policies cover information exchanges among staff, between the staff and the executive director, between the executive director and the board, and among the board members. This section of the policy encompass email, written, and oral communications; the individuals that are included in certain types of communications; and whether, or the degree to which, personal communications are permitted or restricted in the workplace. Internal communications policies should also include language governing the tone and manner of all modes of communications in order to create and sustain a professional work environment.¹

- **Trademarks, Logos, and Seals** – These are the policies governing the identification of the organization internally and publicly. They include:
  - the specifications (official pantone color number, sizes and proportions, etc.) and permissible placements of the organization logo(s) in both print and electronic media;
  - preferred or required font styles and sizes to be used in all visual communications; and
  - references to the organization’s registered trademarks.

¹This policy should also be duplicated in the organization’s Equal Employment Opportunity policy, harassment and hostile work environment policy
An organization’s style guide would also become part of this component of the communications policy.

- **External Communications** – This is the policy component that governs the organization’s public profile and the projection of its mission and activities to the community and its constituents. External communications policies provide guidelines on the modes of disseminating program information; guidelines on the use of social media, both organizational and any expectations of staff’s individual use; the approved phrases and key words to be used when describing the organization and its constituents or communities (for example, “people who are homeless” versus “homeless people”, “La Rasas” versus “Hispanic” or “Latino”). This policy should also articulate required descriptions, copyright statements, employment policy statements, and legal disclaimers, as well as dictate their required uses in all modes of communication.

- **Privacy, Security, and Confidentiality** – This policy provides guidance on information technology and on the documentation, storage, and dissemination of Personal Identifier Information (PII) such as social security numbers and other personal information about staff and program participants. It also states what contact information can and cannot be released to whom and under what circumstances, and acceptable business use of communications software and hardware resources.

- **Crisis and Disaster Planning** – The board should develop the organization’s policy for dealing with both “mission-based” and environmental crises and disasters. The policy should identify who is authorized to speak to the media, to staff, and to constituents on behalf of the organization and under what circumstances. It should include any standard responses acceptable for use by other key staff and stakeholders. It should also make provisions for actions, decisions, vital service continuation, and other essential functions in the absence of telephone communications or internet access in the event of an emergency. For more information on this topic, see the Standards for Excellence educational bulletin on *Crisis and Disaster Planning*.

- Related documents appearing as attachments to the communications policy may include the organization’s strategic and development plans, other related policies, letterhead and other document samples, and lists of authorized contact persons.

**The Communications Plan**
With the communications policy as its foundation and the organization’s mission as its guide, the organization’s staff should produce a communications plan in order to articulate and implement the communications policy. The plan often outlines the step-by-step process of managing communications resources toward implementing the organization’s communications policies. The plan should reflect precisely how the roles of the board, management, staff, and key stakeholders as articulated in the communications policy will be actualized on a daily, monthly, quarterly, and annual basis, as appropriate.
The key elements in developing a communications plan include:

- **Assignment of Responsibility** – A team of staff and stakeholders should be assembled to spearhead the planning process, preferably with an appointed or elected chair or team leader.

- **Analysis of the Internal Organizational Environment** – This includes (1) a thoughtful review of the organization’s mission and vision statements to establish boundaries; (2) a review of current and future operations status, staff, and material resources; and (3) a review of other active or pending organizational plans (strategic, fundraising, information technology, recruitment, etc.) to ensure that the various parts of the organization are supportive of each other and the mission.

- **Analysis of the Organization’s External Environment** – The team should identify external forces that will impact the organization’s communications content (for example: legislative, environmental), including the organization’s strengths and weaknesses in terms of controlling or shaping that impact.

- **Identifying Service Constituents and Other Target Audiences** – The value and effectiveness of a communications plan centers on its value to the intended recipients. First identify those with whom the organization will communicate and then what those entities and individuals will want to hear and see to ensure the plan’s maximum strategic effectiveness. Members of these recipient groups should be involved in the planning process at this point, as soon as the groups are identified.²

- **Messaging** – What will the organization say, how will it say it and what does it want its audience to do about it? Clear messaging should educate, inspire, and move its recipients to action.

- **Selection of Media** – Based on the internal and external analysis and comprised of the messaging outcomes, the organization should identify the specific media to be used to in order to maximize each of the five modes of communications: electronic, visual, audio, print, and face-to-face.³ In addition to the application of “media” as modes of communications (website, internet, podcasts, brochures, etc.), the plan should include the use of media outlets (local and national television, newspapers, magazines, radio, etc.).

- **Establishing Benchmarks** – The plan should include goals and objectives that determine the success of each outreach effort. What will the measures of success be? (for example, number of event attendees? number of petition signers? number of social media “likes” and “shares?”) Setting and evaluating benchmarks will help the plan to effectively grow the organization – and grow with the organization.

- **Plan Ratification and Distribution** – the final plan document should include the organizational mission and vision statements, an introductory summary of each of the

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³ Patterson and Radtke, 2009.
planning outcomes, a statement of the benchmark objectives, a budget reflecting allocation of existing resources and resources to be pursued and developed, and a timeline for implementation. Once approved, the plan should be distributed to key staff and stakeholders. The entire plan – or subsets of the document, at the board’s discretion – should be distributed to the entire staff.

It is no accident that the process cycles for development and communications are nearly identical – one is about fund-raising, the other is about friend-raising. Neither can be fully successful without the other. Many organizations place the communications and development roles under the same management to ensure this mutual support. The communications planning and execution process is often linked to the organization’s development and fundraising process. It should also reflect the meaningful involvement of any volunteer management activities in order to achieve and sustain constituent engagement.

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<th>KEY PHRASE</th>
<th>ENGAGE:</th>
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<td>To occupy the attention of a person or persons; to attract and involve.</td>
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Historically, many nonprofit organization’s communications activities could be characterized as a one-way monologue – the organization communicates its policies and procedures to its leadership and staff, and its mission, programs, and services to its constituents and the community. “Public engagement” is the beginning of a dialogue – the invitation, encouragement, and facilitation of two-way exchanges of information and ideas between the organization and the public. Perhaps an educational foundation in England said it best when referring to public engagement as "the involvement of specialists listening to, developing their understanding of, and interacting with, non-specialists."4

**Benefits of Engaging the Public**

- Provides direct and real-time feedback regarding organizational programs, services and activities
- Identifies potential volunteers, donors and other resources
- Informs and enhances the organization’s customer service activities
- Creates ad-hoc spokespersons for the organization’s programs and activities
- Exercises influence over the public perception of the organization

**How to Begin**

When planning public engagement strategies:

- Create teams or task forces that engage the public in the organization’s strategic planning, brainstorming toward problem-solving, or organizing activities that address unmet needs.
- Devise engagement activities for the board, management, and staff. Ask for constructive feedback about the policies, procedures, and programs by which they are bound and ensure all voices are heard, from the entry level to the executive level.
- Ensure that those most directly impacted by your programs and services have every possible means of informing the organization’s provision of those programs and services.
- Ensure that individuals and groups with existing influence are not the only ones consulted by the organization for feedback. Identify relevant, but underrepresented, constituencies and engage them directly in organizational activities and programs to gain new and different perspectives. For example, create a way to consult local youth about innovative programs for senior citizens.

Examine all of your organization’s programs, projects, activities, communications, locations, and physical facilities to identify opportunities to elicit and receive public feedback. Some widely used methods are surveys, suggestion boxes, toll-free numbers, free webinars, and contests.

Sample tactics for engaging the public include:

- Provide free training to individuals in some hands-on aspect of the organizational mission, as appropriate.
- Identify board members, management, or staff who can speak effectively about the mission of the organization and the issues it addresses. Market those stakeholders to speaker’s bureaus, libraries, conferences – any event or organization that can serve as a platform for public exposure and resulting dialogue.
- Implement a “Talk to the Expert” interactive webinar or presentation for your constituents. Have a leader from the organization or a high-profile figure in the subject matter conduct a brief presentation followed by a question-and-answer opportunity. As an alternative to a live event, use a blog or social medium to solicit questions in advance for the expert (this also has the added advantage of driving repeat visits to the blogsite or website).
- Launch a petition or campaign about a pressing issue requiring actual and/or electronic signatures as an easy way to empower the community and constituents to address the organization’s mission.
- Institute an annual or semi-annual comprehensive customer survey to be used as a meaningful assessment tool for the organization. Engage volunteer stakeholders to encourage the timely participation of other stakeholders, constituents, and community members to meet a specific response rate goal.
- While electronic opportunities for participation are rapid and cost-efficient, consider to what degree your target audience or constituents have internet access and/or prefer electronic communications. Consider direct mail opportunities, including a self-addressed stamped envelope whenever possible to increase the response rate. Consider in-person engagement activities where our participants can network and assemble in a convenient location.
• During events, empower attending staff and stakeholders to elicit real-time feedback. Debrief shortly after the event to capture and consider that feedback, asking questions such as: How do you like that activity? Was the menu to your liking? Did the chosen speaker give you the information you needed or expected?"

**KEY PHRASE**

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<th>SOCIAL MEDIA:</th>
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<td>A group of mobile and internet-based applications that allow the creation and exchange of user-generated content.</td>
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This most important phrase in this definition of social media is “exchange of user-generated content.” If organizational communications were historically a one-sided monologue – and engaging the public is essentially a dialogue – the advent of social media begins a virtual partnership, with individuals and other organizations sharing the task of analyzing and responding to mission-related issues, policies, and events. The social media user is neither primarily an information recipient, as in standard communications, nor primarily an information transmitter, as with successful public engagement. With social media platforms, the user becomes an active collaborator and the empowerment of the user community is the greatest factor in the platform’s appeal.

**Benefits of Establishing a Social Media Platform**

• Reduced demands on staff for disseminating organizational information by making the answers to frequently asked questions available to the public at large
• Exponentially raises the organization’s public profile by engaging the community in promoting programs, events, and activities
• Allows rapid response to emergent situations and circumstances
• Demonstrates public support for your organization by building a community of “friends,” “likes” or “followers”

With millennials leading the charge as today’s activists, every nonprofit must consider seriously the surging use of social media by 18 to 34-year olds and the appropriate use of these platforms in reaching its audience and constituents. In a recent report by the Pew Research Center, in 2013, 71 percent of online adults reported using Facebook, 22 percent using LinkedIn, 21 percent using Pinterest, 18 percent using Twitter, and 17 percent using Instagram. All percentage were up two to four percentage points from the previous year.5

**Before you begin**

**Answer “Yes or No”**

The first question to be answered is whether an organization’s mission, programs, and constituency warrant social media engagement beyond a basic website, and whether the organization’s current resources can establish or support that engagement. While every organization should have some digital or internet presence, not every organization is suited to an active social media component. For example, an organization serving a constituency unlikely to

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5 Pew Research Center’s Internet Project Tracking Surveys, 2012-2013, data collected August 7-September 16, 2013.
have access to the internet may answer this question differently from one serving a watch-dog function on current public events.

**Answer the question “Why?”**

Identify the top two or three goals for engaging in social media that your organization wishes to achieve (you can also use the “Benefits of a Social Media Platform” list herein to help you identify potential benefits that may not have been considered previously). Once the goals for social media outreach have been identified, these goals should drive the decisions as to the platforms in which the organization should engage. This analysis should also include objective means of determining whether the named goals are being effectively achieved.

**Who is in control?**

There is no way to control opposing viewpoints of the conversation in the interactive world of social media – in fact, it is best not to try. While it is possible to establish an approval process for comments, then the question becomes “who will manage that process timely and effectively?” The board should be directly involved in the analysis and decision-making regarding these issues, as it is responsible addressing any legal, moral, or financial liabilities that may arise from participating in un-vetted public interactions.

**Getting Started**

**Focus your Energy and Resources**

There are numerous social platforms available, with more being introduced all the time. It takes significant time and activity to build a community through any social medium, so focus first on the one or two platforms best-suited to achieve your immediate goals and maximize your existing resources. You can engage in additional platforms after you’ve built some momentum in your primary media.

- **Facebook** – An online social networking service. Users create a personal profile, add other users as “friends,” and exchange messages, images, and information. Users may join common-interest user groups and categorize their friends into lists. According to Facebook’s home page, there are over 1.23 billion monthly active Facebook users worldwide, including 945 million mobile active users. A Facebook page is now an important social medium for any organization, and while some elect to have a single comprehensive page, others set up individual pages for each program or activity.

- **Twitter** – An online social networking and microblogging service that enables users to send and read "tweets" – short text messages limited to 140 characters. Users access Twitter through a website interface mobile device application or “app.” Twitter runs a not-too-distant second to Facebook in the social media race for utility and influence, and is particularly effective in the immediate distribution of a real-time message in emergency or time-sensitive situations.

- **YouTube** – A video-sharing website on which users can upload, view, and share videos. The site displays a wide variety of user-generated video content, including video clips,

TV clips, music videos, and amateur content such as video blogging, short original videos, and educational videos. Organizations whose missions embrace the visual or performing arts or transformational services should consider this an essential tool. YouTube also holds great utility for the posting of educational videos, presentations, event and project documentation, and other visual media for any organization.

**Blogging** – A “blog” (contraction of the phrase “web log”) is a discussion or informational site consisting of individual "posts" or entries. While most often the work is by an individual, "multi-author blogs" (MABs) from organizations are on the rise and are supported by other social media platforms.

**Check Out the Competition**
Take a look at what other organizations with similar or competing missions are doing. Try to employ what impresses you without duplicating it, and make notes to avoid what discourages your interest.

**Put your Best Foot Forward**
If the selected social medium allows for the personalization of your organizational presence, take full advantage of that option. The more compelling and unique your digital presence, the more attractive and engaging it will be to potential followers. Develop a “look and feel” for your visual media and a “tone and feel” for your verbal media that truly reflect your organization – and be consistent with these profiles.

**Assign Responsibility**
Effective use of social media takes consistent effort, preferably with some historical memory. If possible, responsibility for populating and monitoring the organization’s social media platforms should be assigned to a single person who can devote a meaningful amount of time to the task – not spare time, but full time or part time. This person does not have to actually do everything, but he or she must be responsible for seeing to it that regular updates; responses to posts, messages and inquiries; and real-time responses to emergent occurrences are accomplished through support from other staff or volunteers.

**Give and Take**
For those media that allow for links and connections, such as Facebook and YouTube, reach out to other organizations with which you partner or wish to partner and establish mutual platform links. This gives you a jumpstart on building your own community while increasing your value as an information resource for your own followers.

**Enhance your Existing Social Media Platforms**
- *Narrow your focus:* Create an additional group or groups based on one or more aspects of your programs and services and establish a presence for them on your platforms. A narrower or more specific focus can potentially increase both the number of viewers and followers and their level of engagement. You may also be able to become an “official sponsor” of an existing and active group comprised of your service constituency – check your platform’s policies and procedures to find out if you can and how.
- *Ask an expert:* Sometimes looking at the same thing with a new and informed eye can reveal easy ways to enhance what you are already doing and suggested what more you
can do. This can be a professional consultant or a member of your community who is a very active participant in social media – or both.

- **Pull your friends closer:** Send an email to your existing community specifically inviting them to connect with your organization’s social media platform(s).
- **Ideally, update the content of social media should daily:** If this is not the case for your organization, determine if and how it can become the case or what other frequency is feasible.
- **Add a blog, if you do not have one already.** You can feature original articles or – if your resources are limited and there is an existing blogger harmonious with your focus and context – invite him or her to feature that blog on your site or write blogs for you.
- **Pay attention to the youth:** They are the donors, volunteers and constituents of tomorrow.
- **Always provide an avenue for donating time, energy, and money to the organization in your social media platforms**
- **Always provide an opportunity to get involved in the events and activities announced in your platform:** Be sure to report on the event, project, or program after the fact to spark interest in future opportunities to participate.

A Special Note: Too often organizations emphasize using social media to acquire as many “friends” and “followers” as possible. While the number of subscribers can reflect the organization’s popularity, the emphasis should be on driving conversations about the issues addressed by the organization’s mission that are important to the community and then facilitating their engagement in those conversations. Serving as an informational resource is also an important function.

**Selected Resources**

**Publications**

*Communications Toolkit: A Guide to Navigating Communications for the Nonprofit World,* Hershey, R. Christing. Cause Communications, 2005

*Generating Buzz: Strategic Communications for Nonprofit Boards*, Patterson, Sally J., Boardsource, 2006.


**Sample Policies**

“Sample Communications Policy,” Dunn, Kelly, [www.workforce.com](http://www.workforce.com), April 2000


Social Media Governance Policy Database
123 Social Media Policy Examples

Web 2.0 Governance Policies and Best Practices

The Nonprofit Social Media Policy Workbook, idealware (April 2012)
http://www.idealware.org/reports/nonprofit-social-media-policy-workbook

**Websites**

http://www.socialmediaexaminer.com/10-ways-non-profits-can-benefit-from-social-media/
This article contains good information on software applications and products that can make your web page and internet communications more manageable and interactive, including online polls and surveys, creating chat rooms, and tools for combining your social media activities onto a single platform.

http://www.youtube.com/nonprofits
YouTube offers special services for videos posted by certified nonprofits, including donation buttons, event streaming, video annotations, and public engagement overlays.

http://www.slideshare.net/search/slideshow?searchfrom=header&q=online+volunteer+recruitment&ud=any&ft=all&lang=**&sort=
Slideshare.net has several instructional videos on using the internet and social media to engage the public, and recruit volunteers

*See, Say, Feel, Do: Social Media Metrics that Matter*, Fenton Communications

**Attachments**

Attachment A: Social Networking Policy, reprinted with permission of The Arc Baltimore.
Attachment B: Sample Nonprofit Style Guide, Standards for Excellence Institute
Attachment C: Essential Communications Tools, from Generate Buzz! Strategic Communication for Nonprofit Boards, Sally Patterson, BoardSource 2011. Reprinted with permission of Sally J. Patterson.

**Acknowledgements:** Special thanks and acknowledgments to Eraka Rouzoroundu for her development of this bulletin and to Sally Patterson for her contributions to this resource.
Source: The Arc Baltimore

The Arc Baltimore takes no position on your decision to start or maintain a blog or participate in other social networking activities. However, it is the right and duty of the company to protect itself from unauthorized disclosure of information. The Arc Baltimore’s social networking policy includes rules and guidelines for company-authorized social networking and personal social networking and applies to all staff.

General Provisions

Blogging or other forms of social media or technology include, but are not limited to, video or wiki postings, sites such as Facebook and Twitter, chat rooms, personal blogs or other similar forms of online journals, diaries or personal newsletters not affiliated with The Arc Baltimore.

Unless specifically instructed, employees are not authorized and therefore restricted from speaking on behalf of The Arc Baltimore. Employees may not publicly discuss clients, products, employees, or any work-related matters, whether confidential or not, outside company-authorized communications. Employees are expected to protect the privacy of The Arc Baltimore and its employees and clients and are prohibited from disclosing personal employee and nonemployee information and any other proprietary and nonpublic information to which employees have access. Such information includes, but is not limited to, customer information, trade secrets, financial information, and strategic business plans.

Employer Monitoring

Employees are cautioned that they should have no expectation of privacy while using the internet. Your postings can be reviewed by anyone, including The Arc Baltimore. The Arc Baltimore reserves the right to monitor comments or discussions about the agency, its employees, clients, and the industry, including products and competitors, posted on the internet by anyone, including employees and non-employees. The Arc Baltimore uses blog-search tools and software to monitor forums such as blogs and other types of personal journals, diaries, personal and business discussion forums, and social networking sites.

Employees are cautioned that they should have no expectation of privacy while using company equipment or facilities for any purpose, including authorized blogging.

The Arc Baltimore reserves the right to use content management tools to monitor, review, or block content on company blogs that violate company blogging rules and guidelines.

Reporting Violations

The Arc Baltimore requests and strongly urges employees to report any violations or possible or perceived violations to supervisors, managers or the HR department. Violations include discussions of The Arc Baltimore and its employees and clients, any discussion of proprietary information, and any unlawful activity related to blogging or social networking.

Discipline for Violations
The Arc Baltimore investigates and responds to all reports of violations of the social networking policy and other related policies. Violation of the agency’s social networking policy will result in disciplinary action up to and including immediate termination. Discipline or termination will be determined based on the nature and factors of any blog or social networking post. The Arc Baltimore reserves the right to take legal action where necessary against employees who engage in prohibited or unlawful conduct.

Acknowledgment

Employees are required to sign a written acknowledgement that they have received, read, understood and agreed to comply with the company’s social networking policy and any other related policy.

Authorized Social Networking

The goal of authorized social networking and blogging is to become a part of the industry conversation and promote web-based sharing of ideas and exchange of information. Authorized social networking and blogging is used to convey information about agency products and services, promote and raise awareness of The Arc Baltimore’s brand, search for potential new markets, communicate with employees and customers to brainstorm, issue or respond to breaking news or publicity, and discuss corporate, business-unit and department-specific activities and events.

When social networking, blogging, or using other forms of web-based forums, The Arc Baltimore must ensure that use of these communications maintains our brand identity, integrity and reputation while minimizing actual or potential legal risks, whether used inside or outside the workplace.

Rules and Guidelines

The following rules and guidelines apply to social networking and blogging when authorized by the agency and done on company time. The rules and guidelines apply to all employer-related blogs and social networking entries, including agency subsidiaries or affiliates.

Only authorized employees can prepare and modify content for The Arc Baltimore’s blog located on The Arc Baltimore’s homepage, and/or the social networking entries located on sites such as Facebook or Twitter. Content must be relevant, add value, and meet at least one of the specified goals or purposes developed by The Arc Baltimore. If uncertain about any information, material, or conversation, discuss the content with your manager.

Any copyrighted information where written reprint information has not been obtained in advance cannot be posted on The Arc Baltimore’s sites.

Business units and departments are responsible for ensuring all blogging and social networking information complies with The Arc Baltimore’s written policies. Department heads are authorized to remove any content that does not meet the rules and guidelines of this policy or that may be illegal or offensive. Removal of such content will be done without permission of the blogger or advance warning.

The Arc Baltimore expects all guest bloggers to abide by all rules and guidelines of this policy. The Arc Baltimore reserves the right to remove, without advance notice or permission, all guest bloggers’ content considered inaccurate or offensive. The Arc Baltimore also reserves the right to take legal action against guests who engage in prohibited or unlawful conduct.
Personal Blogs

The Arc Baltimore respects the right of employees to write blogs and use social networking sites and does not want to discourage employees from self-publishing and self-expression. Employees are expected to follow the guidelines and policies set forth to provide a clear line between you as the individual and you as the employee.

The Arc Baltimore respects the right of employees to use blogs and social networking sites as a medium of self-expression and public conversation and does not discriminate against employees who use these media for personal interests and affiliations or other lawful purposes.

Bloggers and commenters are personally responsible for their commentary on blogs and social networking sites. Bloggers and commenters can be held personally liable for commentary that is considered defamatory, obscene, proprietary, or libelous by any offended party, not just The Arc Baltimore.

Employees cannot use employer-owned equipment, including computers, company-licensed software, or other electronic equipment, nor facilities or agency time, to conduct personal blogging or social networking activities.

Employees cannot use blogs or social networking sites to harass, threaten, discriminate, or disparage against employees or anyone associated with or doing business with The Arc Baltimore.

If you choose to identify yourself as an Arc Baltimore employee, please understand that some readers may view you as a spokesperson for The Arc Baltimore. Because of this possibility, we ask that you state that your views expressed in your blog or social networking area are your own and not those of the company, nor of any person or organization affiliated or doing business with The Arc Baltimore.

Employees cannot post on personal blogs or other sites the name, trademark, or logo of The Arc Baltimore or any business with a connection to The Arc Baltimore. Employees cannot post company-privileged information, including copyrighted information or company-issued documents.

Employees cannot post on personal blogs or social networking sites photographs of other employees, clients, vendors, or suppliers, nor can employees post photographs of persons engaged in company business or at company events.

Employees cannot post on personal blogs and social networking sites any advertisements or photographs of company products, nor sell company products and services.

If contacted by the media or press about their post that relates to The Arc Baltimore business, employees are required to speak with the Executive Director, Chief Advancement Officer, or their designee before responding.

If you have any questions relating to this policy, your personal blog or social networking, contact your manager or Human Resources. Reprinted with permission of The Arc Baltimore, 2014.
**Attachment B**  
Sample Organizational Style Guide

*This Guide generally follows the Associated Press Stylebook for style preferences.*

Every board member and staff person should have a copy of the organization’s style guide, or be able to access a copy easily. The Guide should be included in all employee orientation/training processes and each stakeholder should be held accountable for adhering to it.

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A

**Abbreviations**
- Don’t use postal abbreviations (MD, VA) in text **except** when referring to multiple locations in write-ups. (see STATES)
- NE, NW, SE, SW
- Spell out United States

**Acronyms** – Spell out organization names on first reference. Use acronyms later. As a rule, only use acronyms if they are well known; don’t make them up. For example, “Internal Revenue Service” – spell out full name (capitalized) on first reference, and “IRS” is acceptable on second reference.

**Active voice** is always better than passive voice (Anytime it is not clear from a sentence who is doing the action, it is probably passive.). **Passive:** A decision was reached that you should be fired. **Active:** I decided to fire you.

**Address format** – Describe how your organization’s address should be formatted.

“**And**” should be spelled out. The ampersand ‘&’ should only be used if it is officially part of a proper name or organization

**Apostrophes:** Watch this in particular with references to organization names.

B

**Board** is singular and is not capitalized. **Board members** is plural, two words, and not capitalized. *The board is meeting in the conference room. The board is excited about its new strategic plan.* OR *The board members are ready to meet. They have worked hard on this strategic plan.*

**Board chair** is preferable to chairman, chairwoman, or chairperson.

**Board member** is the preferred generic terminology, as opposed to trustee or director. At many foundations, however, trustee is used. Go with the preference of the organization you’re referring to.

**Boardroom** is one word.

**Bylaw** is one word, no hyphen.
Capacity building is two words when used as a noun (e.g. Organization is engaging in capacity building). However, it is hyphenated when used as an adjective (e.g., Organization has a new and exciting capacity-building strategy).

Citations – see Turabian, Kate, *A Manual for Writers of Term Papers, Theses, and Dissertations* 6th ed. 1996.

Colors – Insert information about color palettes in place for your organization

Co-branding: On all program documents - - be sure that “Project of Organization” is stated prominently with the Organization’s logo.

Committee should be treated like the word board, and not capitalized. (e.g. “We’re inviting the investment committee to meet on Thursday.”)

Corporate form - use LLP not L.L.P.

Courtesy titles – Refer to both men and women by first and last name: Jill Jones or Mike Jones. Use the courtesy titles Mr., Miss, Ms., or Mrs. only in direct quotations or when specifically requested. See Titles.

Credentials – use CPA not C.P.A and CFRE not C.F.R.E.

Dash – there are differences between hyphens, en dashes, and em dashes.
- Hyphens are used within words, as in “write-ups” (use hyphen/dash key)
- En dashes are used like the word “to,” as in “ages 3 – 5”
- Em dashes are used to separate out a phrase for emphasis or dramatic effect. (e.g. “The fundraiser was so successful — bringing in $5 million — that we decided to do another one next year.”)

Data is plural. Make sure your verbs and possessive pronouns agree in number. (e.g. *The data are stored in the research folder.*)

Dates – write numbers using only numerals (cardinal number) rather than 1st, 2nd, 3rd, 21st (ordinal number) (e.g. “The fiscal year starts July 1.”) Using ordinal numbers is more common and acceptable in speech or conversational writing (e.g. “We had a delightful picnic on the 4th of July.”) Use date format: September 20, 20xx. Do not use ‘September 20th’. If you do not use the numeric day in the date, it should read ‘September 20xx’ not ‘September, 20xx’ (no comma required).
Disabilities – see more at www.apastyle.org/disabilities.html

Put people first, not their disability
Comment: Preferred expressions avoid the implication that the person as a whole is disabled or defective.

**PREFERRED**
- person with (who has) a disability
- child with a congenital disability
- child with a birth impairment
- person with mental illness or psychiatric disability

**PROBLEMATIC**
- disabled person
- birth defective child
- child with a birth impairment
- mentally ill person

Dollar and other numeric amounts - when exact amounts are not critical to report, it is generally preferable to use rounded amounts. In general, do not use cents for dollar amounts over $99.99 or a decimal for amounts in the three digit millions or billions: “the $700 billion rescue package,” “the state has a $243 million projected shortfall this fiscal year,” “the special session of the legislature approved $1.3 billion in additional revenues.”

Electronic media – Below is a list of common terms and their preferred spelling.
- database
- email
- FTP
- Internet
- LISTSERV* (tm) – the generic term is electronic mailing list
- online
- PDF
- URL
- Web

First – not 1st for numerical order.

For-profit is hyphenated.

Font for external documents: Insert fonts that have been chosen for the organization. For headers, use xxx; for normal text, use xxx or xxx. Font size should be at least 11 pt. Organization’s emails and website should use xxx.

Footnotes: Do not use footnotes to reference information. Use an in-text citation such as, "According to the Standards for Excellence codes, “Communications, Engaging the Public and Social Media” bulletin…” Do not use footnotes to add anecdotes or extra information to your article.
Use the same method of citation regardless of your source. Books and journal articles, for example, should both be cited in the same method.

**Foundation** is capitalized on second reference when referring to a specific foundation (not foundations in general).

**Fundraising, fundraiser** is one word.

**Grammar Notes** – Avoid use of contractions (e.g. It IS in the conference room; versus It’s in the conference room). Reflexive pronouns – when referring to people use “who,” when referring to organizations, use “that”.

**Grantmaking, grantmaker** is one word.

**Grassroots** is one word.

**Hyphenation** – Hyphenate words like decision making and conflict of interest only when used to modify a noun. Do not hyphenate these words when used as nouns.

Examples: Improve your decision-making skills. Let young people get involved in organizational decision making. I suspect there is a conflict of interest there. Every board should have some sort of conflict-of-interest policy. (except policymaking, which is one word)

**In-kind** is hyphenated when it is used as an adjective, as in “in-kind donation”

**Inc.** should not be used unless it is part of the organization’s name that it uses every time it mentions its name. Please do not put Inc in an organization’s database record. If Inc. must be used, set it off with a comma. If it is in the official name, use it on first reference, and drop it for subsequent references.

**Internet terminology**
- **Internet, World Wide Web**: proper nouns, capitalize
- **website**
- **web page**
- **email**: not hyphenated, lowercase
- **online**: one word, no hyphen
Less vs. fewer – Less should be used with nouns that can’t be counted, as in “let’s talk in here where there is less noise.” Fewer should be used with nouns that can be counted, as in “fewer people showed up for the rally than we expected.”

Logos – The organization has one logo – describe logo. Logos can be found INSERT LOCATION.

Logo Guidelines

• Never change the colors of any part or parts of the logos
• Never skew, tilt, copy, paste, enlarge or shrink the logos
• Never change the size of the logo beyond the minimum size. Writing should ALWAYS be readable.
• Never add additional elements to the logo
• Never rearrange the elements of the logo
• Never print the logo over a patterned background or place it on a background that would compromise the readability of the elements
• Never crop the logo or let it bleed off the page
• Never change the proportional sizing of the logos

Logo Color Options:
The Logo should only appear in the designed colors. There is also a black and white option. Select the color scheme that will create the most contrast with the background and does not clash with other colors.

Clear Space:
Assure that there is ample white space between the logos so they do not appear crowded.

Sizing standards for Organization logo:
Big Logo: (H)1.48” by (W)3.5”:

Medium: 1.06” by 2.5”:

Minimum Size: 0.64” by 1.5”:

Long sentences containing many clauses, commas, semicolons, and that run-on to several lines should be shortened. If a sentence contains a long list of items, particularly complicated items, separate them out into a bulleted list.
Low-income is hyphenated when used as an adjective. If low and moderate are both descriptions of kind of income, they both require hyphens, even if separated from income. (e.g. “Kathy’s 24-hour clinic serves children from low- and moderate-income families.”)

M

Media is plural. Make sure your verbs and possessive pronouns agree in number.

Memos are only used for internal purposes. When writing a Memo, the logo should still be in the header and the standard format is:

Memorandum
Date
To:
From:
CC:
RE:

N

Nonprofit – One word, no hyphen.

Numbers (see also dollar and other numeric amounts above)

- Numbers 10 and above are written in numerals, nine and under should be spelled out. Exception – if a sentence contains numbers like nine and 103, you should default to the numerals, and make them 9 and 103.
- Decades should be written as 1930s not 30s or ’30s.
- Use hyphens between numbers of rulings, a five-to-four ruling.
- Format phone numbers using periods as in our letterhead, 202.452.6262. Please note, Dynamics database defaults to (123) 456-7891
- When writing toll-free or long distance numbers, do not list the “1.” 800.883.6262
- When writing percentages, use the numeral for all values and spell out percent. 4 percent. Use % when in a table or figure.
- When writing monetary values, always use the dollar sign and the numeral for values fewer than 1 million. Spell out million or billion and round down the nearest tenth. Never spell out dollars except in general use. I found a dollar. I have $1.50. He won $4.2 million in the lottery. Use dollars and cents, even if there are no cents (i.e. $50.00).
- Write times as follows: 11 am, 5 this morning, at 10:30 last night, Do not write 11:00 or 11 o’clock. Make sure am and pm are always lowercase without periods and a single space between the time and the am or pm reference. Be sure not to be redundant in writing time. I woke up at 7 am in the morning.
Ongoing is one word.

Organization is singular. Make sure your verbs and possessive pronouns agree in number. The organization has 10,000 members.

Organizational Name: XXX is our legal name. We commonly use our trade name, xxx, not yyy or YYY. However, when using our trade name within a document, you should spell out our entire trade name for its initial use, and you may refer to us as xxx afterwards.

Paragraph spacing Either indent or insert an extra line of space to distinguish a new paragraph. Do not do both.

Percentages spell out the word percent (e.g. “next year only 20 percent of our budget will come from foundations.”) See Numbers.

Policymaking is one word.

Power Point Presentations for Organization can be found here XXXX.

Programs: Organizational programs and services should be listed in alphabetical order as follows:

(insert official program titles here)

Punctuation

- Use commas before “and” and “or” at the end of a series. We bought apples, oranges, and bananas.
- Use a comma between the name and a suffix. Sammy Davis, Jr.
- Do not use slash “/” in text unless part of a name.
- Place one space before — and after — em dashes.
- Dashes and hyphens – see Dash
- Put one space between sentences, not two.

Quotation marks – Double quotation marks are used in the following ways:

- around directly quoted material
- song titles
- short-story titles
• short-poem titles
• articles appearing in any periodical (newspaper, magazine, journal, newsletter)
• essays
• episodes of television or radio series
• chapter titles of books
• around words being used in a special, abnormal sense — do not put quotes around slang words or phrases

R

Racial Inclusive Language: Racial/ethnic groups are designated by proper nouns and are capitalized. When names of colors are used to refer to human groups, they are capitalized (e.g., Blacks instead of blacks; Whites instead of whites). Hyphens are not used in multiword labels (e.g., Mexican Americans instead of Mexican-Americans). See more at www.apastyle.org/race.html

Really: Don’t use the word “really”…it undermines the effectiveness of the word that you’re modifying. Make your point without it, or choose a new word as your subject.

S

Semi-colons
Semi-colons are generally used for two reasons. According to AP “use the semicolon to indicate a greater separation of thought and information than a comma can convey but less than the separation that a period implies.”

1. Clarify a series
   Use semicolons to separate elements of a series when individual segments contain material that also must be set off by commas.

   e.g. The menu for the day included, for brunch, quiche, cantaloupe, and croissants; for tea, chamomile and crumpets; and for dinner, roast beef, potatoes, and asparagus.

   The point of using a semicolon here is to avoid confusion that might occur if the wrong items are attached to particular lists.

2. Linking independent clauses
   If two clauses are not joined by a conjunction (and, but, or, yet, for, nor, so) and form a compound sentence, use a semicolon to connect them.

   e.g. The taxi refused to take me to 50th Street; I had to catch a ride with Kathy.
So if you don’t like using the semicolon in this way, your options are to add a conjunction, or split the sentence into two.


Start-up is hyphenated, as in “She’s the head of a successful Internet start-up” or “We often fund start-ups if their board leadership is strong.”

States – Primarily for the purpose of text, where space is at a premium and there are often multiple locations listed for a nonprofit’s service area, use Montgomery County (MD), Falls Church (VA), Prince George’s County (MD), rather than spelling out the state name. (e.g. the Institute serves families in Montgomery County (MD) and Washington, DC.)

That vs. which

- Use that to introduce a clause that contains information essential to the meaning of the sentence. Do not use a comma before “that.” The Nile is the river that gives Egypt life.
- Use which to introduce a clause containing information that is not essential to the meaning of the sentence. Set off the nonessential clause with commas. The Nile, which flows into the Mediterranean, gives Egypt life.

Time – use am and pm without periods. (see NUMBERS)

Titles are always capitalized.

Very Don’t use the word “very”...it undermines the effectiveness of the word that you’re modifying. Make your point without it, or choose a new word as your subject.

Volunteerism rather than voluntarism

web-based has a lowercase w and is hyphenated when used as an adjective.

work plan is two words.

Year-round — hyphenated when used as an adjective

Insert a list of the organization’s registered trademarks if any.
ATTACHMENT C
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