Carleton’s social media strategy
A university-wide approach to social media @ Carleton

Social media is immediate, it is engaging and it builds relationships. At Carleton University, social media is used by various faculty members and staff in administrative and academic departments to engage with diverse audiences for a variety of reasons. The Social Media Strategy Committee was struck to help Carleton continue to enhance our social media presence and create a university-wide strategy. Despite the different audiences and goals we have across the university, the following themes were consistently heard in the Committee’s discussions with faculty, staff and students at Carleton:

- Leadership and accountability
- Training and consultation
- Reputation
- Assessment

With this in mind, it is the intent that this strategy will provide support to community managers so that they can lead their social media communities effectively. This will allow us to respond to the ever-changing needs of our communities, build upon our strengths and collaboratively improve our social media efforts.

Vision

To be the benchmark of excellence in the use and effectiveness of social media communications, with all of our communities, among Canadian universities.

Mission

Through social media, Carleton University initiates and participates in conversations to build positive and informed connections with our communities. We consistently represent the university and work together to actively contribute to the achievement of its strategic goals.

Values

- We are community builders, first and foremost
- We align our efforts with the needs of our respective communities
- We are responsive and timely
- We are positive and constructive
- We are trusted stewards of the reputation of the university
What is social media?

Social media is defined as “the means of interactions among people in which they create, share, and exchange information and ideas in virtual communities and networks.”

Social media is primarily dependent on mobile and web-based technologies to create highly interactive platforms through which individuals and communities share, co-create, discuss, and modify user-generated content.

Social media is important to Carleton inside and outside of the classroom. Carleton’s Strategic Integrated Plan outlines values that focus on excellence in teaching and research, collaboration and partnerships and strengths of our people, our commitment to students and our partners. Social media gives us a platform to build on these strengths and values by allowing people to engage with one another to share information and ideas. As a result, we refer to those operating social media accounts either on behalf of their department or in their professional role as social media “community managers.”

Faculty and staff at universities use social media to communicate with a variety of audiences and for a variety of reasons – including generating pride and loyalty to an institution, promoting useful information to audiences and encouraging engagement and conversations in and outside of the classroom. Most use a combination of platforms to deliver these messages. Universities have a combination of “flagship”, or official, accounts as well as departmental accounts and faculty accounts that encourage engagement and interaction. Please see Carleton.ca/socialmedia for “Appendix A -- Social Media Audit” which was completed in December 2012.

Our strengths

At Carleton University, faculty and staff have been early adopters of social media. The ability to meet our audiences “where they are” and to have conversations with them is key to our overall communications approach. The Carleton community wants to be involved in social media, sees its importance and, as a result, many people at Carleton have an interest or passion for it.

Carleton has strong flagship accounts on today’s popular social media platforms and has rich content, interaction and engagement through these accounts. Many departmental accounts are using social media to share content and encourage interaction. Faculty and instructors are using social media to interact with students in some courses, to engage with colleagues worldwide, and to foster and promote their research. As a result, Carleton has a strong base of social media expertise on campus.


Carleton’s use of social media is “decentralized” allowing all users of social media to be flexible, responsive and relevant to our respective audiences. The fact that there are no or limited approval processes is a strength that aligns with the definition and purpose of social media. The use of social media has been driven by professional services staff and faculty/instructors. It has been a “bottom-up” evolution and therefore those using social media have an interest in it and see the value of using these tools.

The different social media communities at Carleton tend to have unique and customized voices that can be personable, edgy, or professional based on the tool and the expectations of the audience.

Social media gives Carleton another avenue to communicate with our audiences with the added benefit of engaging the community in discussions. Those who choose not to follow social media still receive communication through our primary tools and are able to stay informed.

As with other universities, social media at Carleton is used to reinforce our strategic communications to our main audiences of students (including prospective students), alumni and faculty and staff. Due to its social nature, social media communities are a great venue to share positive Carleton stories, research information as well as to answer questions and engage with our audiences.

**Methodology**

Social media use at Carleton University involves cultivating relationships with key audiences: students (including prospects), alumni, and faculty and staff.

Secondary audiences include the community in which we operate and media outlets. The working group tasked to develop an integrated social media strategy was formed to represent these audience groups and sub-groups, irrespective of whether they were using social media today or not. Please see Carleton.ca/socialmedia for “Appendix B -- Social Media Strategy @ Carleton University Proposal”.

In this way, the working group members were able to represent the needs of the communities that they interact with, as well as understanding the commonalities between the audiences and the tactics used to engage those communities.

The research for this initiative began with an overview of the latest literature on social media, notably articles and reports that focus on social media in higher education. It also involved researching exemplary social media strategies of other universities and organizations.

The development of this social media strategy is a direct reflection of the feedback that the working group received through a variety of consultations, interviews and information gathering from the following groups:
1. Community managers using social media to communicate. This includes professional services staff and faculty members at Carleton (5 discussion groups, 59 participants)
2. Carleton leadership (21 participants)
3. Current students as ‘recipients’ of social media communications (59 respondents)
4. Current employees as ‘recipients’ of social media communications (47 respondents)
5. Alumni as ‘recipients’ of social media communications

In total, over 180 individuals provided their opinions, feedback and suggestions to the working group. This greatly influenced both the identification of the challenges facing Carleton University and the solutions to their challenges provided by the participants.

**Duration**

Social media changes at a rapid pace. New social media tools are being developed on a regular basis and can go in and out of style just as quickly. Those that dominate the landscape today might fade as new tools are developed and are adopted by users.

Due to this continual reinvention, the duration of this strategy will be two years, starting in January 2014. The two-year implementation period for the strategy will allow us to strengthen the foundation for social media at Carleton while staying on top of the latest trends.

**Building our foundation**

Carleton University’s presence on social media is important. Our ability to engage and build communities through social media enhances our relationships, reputation, and strategic communication.

At Carleton, we want to continue to explore opportunities to encourage active use and connection to our community through social media. A defined strategy will build on our current strengths and help us continue to build our use of social media through themes, objectives and clearly defined goals and actions. Through collaborative efforts, we can determine the best use of social media, learn from each other, share successes, and stay current in the constantly changing social media landscape.
Theme: Leadership and accountability

Objective: That Carleton’s use of social media is one that is championed in order to raise its visibility and accountability at senior management levels.

Goal 1A: Formalize the leadership of social media at Carleton University to implement the strategy and support the efforts of academic and administrative departments with their use of social media

   Action 1A:
   - Determine a champion for social media to provide leadership for the use of social media at Carleton through the implementation of the social media strategy.

Goal 1B: Determine a strategic model for social media leadership.

   Action 1B:
   - Create a cross-functional social media advisory committee to initiate and implement a support and consultation model and to provide a permanent forum for ongoing discussion.
   - Identify Carleton’s flagship social media accounts.
   - Set priorities for enacting the goals and actions in this social media strategy.

Theme: Training and consultation

Objective: That social media community managers (and the units they represent) are prepared and supported in their use of social media.

Goal 2A: Enhance resources that support the appropriate selection and use of social media channels while setting realistic expectations about time and resource requirements. Guidelines and resources need to strike a balance between fostering independence and encouraging alignment with the broader Carleton social media strategy and community.

   Action 2A:
   - Develop a social media website as a single point of access to support, resources, training and materials, including branding materials, for social media use at Carleton to connect community managers to meaningful and helpful on- and off-campus social media tools and resources.
   - Create a planning template that can be completed by departments looking to start a social media account. Include items such as: purpose, audience, goals, monitoring, use, password management, etc.
Goal 2B: Develop social media training for community managers.

- **Action 2B:**
  - Create workshops that address the basics of effectively using social media that are unlikely to change over time (e.g. how to define goals for using social media; account naming, tracking, and security; where to get help)
  - Find and invite guest speakers to talk to the community about topics and best practices in social media.

Goal 2C: Foster the development of a peer-to-peer social media community that is able to guide and support Carleton’s effective use of social media as the landscape changes.

- **Action 2C:**
  - Identify early adopters and effective users of social media at Carleton University and invite them to actively participate in a community of practice.
  - Provide members of this community with virtual and physical spaces to meet and collaborate.
  - Give the community the power to guide and contribute to the development of training and support resources.
  - Monitor developing trends and best practices and share findings with all members of the social media community, including social media community managers.

Goal 2D: Develop specific resources to help guide the use of social media for teaching and learning purposes.

- **Action 2D:**
  - Create workshops that address the basics of effectively using social media for teaching and learning that are unlikely to change over time.
  - Seek out and share evidence-based practices on how social media can be used for educational purposes.
  - Encourage educator participation in the larger social media community at Carleton.
Theme: Reputation

Objective: That Carleton’s institutional, departmental and individual reputations are positively and consistently represented through our use of social media, with internal and external audiences.

**Goal 3A:** Departmental social media accounts should be consistent with Carleton’s branding and social media guidelines, and tie to Carleton’s goals outlined in the 2013 Strategic Integrated Plan.

- **Action 3A:**
  - Create a social media toolkit (e.g. logos, profile/background images, banners, etc.)

**Goal 3B:** Provide assistance to social media community managers with creating content and determining appropriate response to comments about Carleton University posted within social media communities.

- **Action 3B:**
  - To support content development, enhance the “using social media on behalf of Carleton University” section in the Social Media Guidelines
  - Create a response guide including audience-specific escalation processes for flagship accounts.

**Goal 3C:** Develop a Carleton University Social Media Directory

- **Action 3C:**
  - Update and maintain Carleton University’s Social Media Directory. The Social Media directory should:
    - Highlight flagship accounts
    - Include contact information for each social media account
    - Include standardized lists of current Carleton-relevant hashtags
    - Require that for accounts to be listed in the social media directory, community managers must complete the planning template.

**Goal 3D:** Develop specific resources outlining the role of social media during crisis communications.

- **Action 3D:**
  - Create social media crisis communication protocol and ensure social media community managers are aware of the protocol.
Theme: Assessment

Objective: That a continuous improvement culture is embedded in our management of social media communities based on the assessment of strengths and opportunities.

**Goal 4A:** Develop specific resources for community managers to assess their social media accounts.

- **Action 4A:**
  - Develop a resource for the social media guidelines that outlines relevant measures.
  - Provide social media content review consultations.
  - Develop and share social media success stories that provide examples of exemplary social media use at Carleton.

**Goal 4B:** Encourage regular self-monitoring and improvement of social media accounts.

- **Actions 4B:**
  - List social media monitoring tools on the social media guidelines website.
  - Share stories of changing the way social media accounts are managed based on lessons learned through monitoring.
  - Complete an annual audit that evaluates the level of engagement of social media accounts at Carleton University and report findings on the flagship accounts at senior management, ARC, and Board of Governors meetings.