



Ready, Set, Go!

The 2026 Social Media Guide for Charities

Introduction

Researched and written by Third Sector Lab for OSCR, this guide is aimed at staff, volunteers and trustees of charities who want to use social media with confidence — focusing on real-world outcomes, safe practice, and approaches that small teams can actually keep up.

Charities and community organisation teams are stretched. Social media is rarely anyone's only job – most of us are also running services, raising funds, recruiting volunteers, and reporting to trustees. This guide is written for that reality.

This guide, produced by Third Sector Lab, builds on OSCR's 2015 Ready, Set, Go guide and reimagines it for 2026 – a year where social media will keep evolving, but the fundamentals of trust, clarity, and human connection matter more than ever.

Social media is no longer a side-channel or noticeboard. For many people, it's the front door to your charity – the first place they'll learn about your cause. Yet in too many organisations, it's still underfunded, treated as an afterthought, or handed to one overstretched staff member. That mismatch shows.

Audiences' expectations have shifted. They're tired of spin and crave **transparency**. They want **real voices** – staff, volunteers, and people with lived experience – not polished slogans. They want **hope as well as urgency**, especially in sectors where heavy messaging has dominated. Young people care about causes, but they'll scroll past content that feels tokenistic or out of touch. And if all you do is broadcast announcements, you'll miss the real power of social: building **community, conversation, and action**.

This guide will help you avoid common traps – like chasing awareness without impact, or letting long approval chains kill good ideas. It will also point you toward overlooked opportunities: LinkedIn and YouTube Shorts for partnership and reach, employee-generated content as the future of influence, and storytelling that sparks solidarity rather than despair.

At the heart of it are five principles that separate noise from impact:

- **Less is more.** Focus beats volume.
- **Go where your audiences are.** Meet people in their spaces, not yours.
- **Digital is everyone's responsibility.** Frontline teams hold the stories and the questions people really ask.
- **Authentic voices cut through corporate comms.** When people share their experiences with consent and dignity, it changes minds and inspires action.
- **Align audience → channel → content.** If those three don't line up, don't post.

This is a **practical handbook for 2026**. It blends narrative, checklists, and case studies so you can use it however you need: end-to-end, or dipped into section by section.

Ready → Set → Go → Measure

Table of Contents

Introduction	2
Section 1. Ready!	
<u>Ready!</u>	7
<u>Measurable Outcomes</u>	8
<u>Audience</u>	9
<u>Content Pillars</u>	10
<u>Rhythm & Roles</u>	10
<u>Consent & Safeguarding</u>	11
<u>Helpful Resources</u>	12
Section 2. Set!	
<u>Set!</u>	14
<u>Policy</u>	15
<u>Roles & Responsibilities</u>	16
<u>Data, Moderation & Security</u>	17
<u>Political Activity</u>	18
<u>Crisis & Escalation</u>	18
<u>Where Social can go Wrong</u>	19
<u>Governance Case Study</u>	19
<u>Helpful Resources</u>	20
Section 3. Go!	
<u>Go!</u>	22
<u>Lead with Usefulness</u>	23
<u>Human Stories</u>	23
<u>Formats & Checklist</u>	24
<u>Captions</u>	24

Table of Contents

<u>Editorial Rhythm</u>	24
<u>Reuse Winners</u>	24
<u>AI in Practice: Repurpose, Don't Replace</u>	25
<u>Prompting Tips</u>	25
<u>AI Golden Rules Checklist</u>	25
<u>Paid</u>	26
Where it can go wrong	26
Case Study	26
Helpful Resources	27

Section 4. Measure

Measure!	29
Outcomes first, metrics second	30
Tracking	30
Review in Rhythm	31
Share Learning	31
Transparency	32
<u>Measurement Case Study</u>	33
<u>Helpful Resources</u>	34

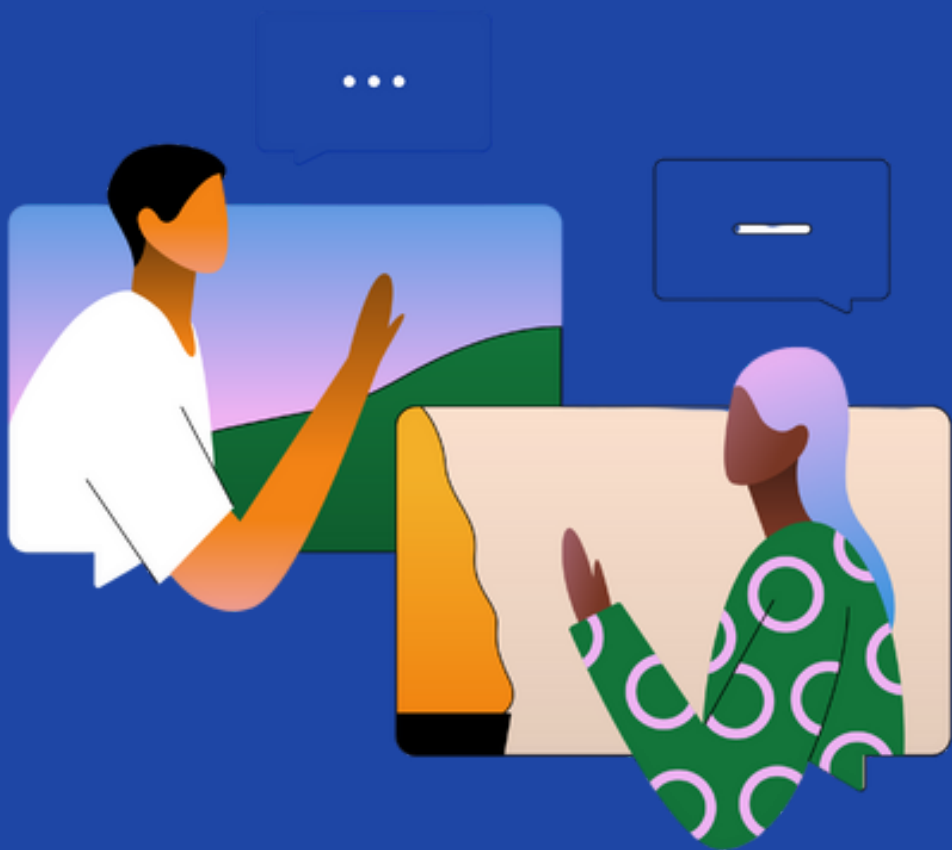
Section 5. Resources & Reference

<u>Resources & Reference</u>	36
<u>Social/Governance Folder</u>	37
<u>Print Out Guide</u>	38
<u>Resources Case Study</u>	39
<u>Bringing it together</u>	39
<u>Additional Resources</u>	40

Table of Contents

Templates & Worksheets

How to Use	42
Disclaimer	43
Outcome Planning Worksheet	44
Audience Snapshot Worksheet	45
Channel Decision Grid	46
Content Pillars	47
Role-Hats Worksheet	48
Consent Log Template	49
Moderation Crib Sheet	50
Crisis One-pager	50
Accessability Cheatsheet	50
Onboarding/Leavers Checklist	51
Story Capture Form	51
Caption Writing Worksheet	51
Quick Reference Poster	52



Section 1. Ready! *(Plan with Purpose)*

Ready!

Before a single post goes live, decide what you want to change in the world and who needs to hear from you for that to happen. That doesn't mean a glossy 40-page strategy. A page or two of sharp, shared focus will do - so long as it's clear enough for everyone on your team to use.

Start with outcomes you can measure in real life

Awareness isn't the goal - action is. A post with 1,000 likes but no sign-ups, donations, or conversations isn't success. Pick one to three outcomes for the next 8–12 weeks and make them measurable:

- "Fill 25 counselling slots by 30 Nov."
- "Recruit 40 event volunteers by 15 Dec."
- "Raise £12,000 for our winter appeal."
- "Secure 300 supporter emails to MSPs."

The wording matters less than the clarity. For each outcome, sketch the path you'll offer: a post with a clear promise → a single mobile-friendly landing page → one action (sign up, donate, apply) → a thank-you that closes the loop. If the path is messy, people will fall off. Fix that before posting.

→ Checklist - Outcome sanity check

- ☐ Is it specific and time-bound?
- ☐ Is there just one action tied to it?
- ☐ Is the journey from post → page → action simple on a phone?
- ☐ Is there one number you'll use to judge success?

Know who you're talking to

Every charity has multiple audiences. You don't need full personas the size of novels - snapshots are enough to guide tone and content:

- Who they are: "Parents of under-5s in Renfrewshire"; "CSR managers in Glasgow."
- What they need: timetables, reassurance, proof, clarity.
- Likely barriers: time, transport, digital confidence, stigma, trust.
- Where they are online: Facebook Groups, Instagram Reels, WhatsApp, LinkedIn.
- Tone that works: friendly and practical; short video; step-by-step carousel.

Spend 20 minutes with frontline staff and ask: "What questions do people ask again and again?" You'll leave with three usable post ideas - no brainstorm required. If you're short on time, AI tools can also help cluster questions or summarise patterns from surveys, feedback, or transcripts, but always sense-check with real staff and service users to keep it grounded in reality.

Accessibility isn't a polish - it's part of the plan. Keep language plain, add alt text to images, captions to videos, hashtags in CamelCase, and use photos that are real and dignified. If translation or interpreting would remove barriers, plan it upfront.

Choose fewer channels, use them better

Being everywhere spreads you thin. Instead, choose the channels that best connect audience → outcome → content.

For some, that might mean focusing on one priority channel done really well, supported by one or two secondary channels for specific audiences or purposes.

Checklist - Channel decision grid

- ☐ Is our audience really here?
- ☐ Does this channel directly serve a key outcome?
- ☐ Do we have time to reply and moderate here?

UK Stat Snapshot

- **Facebook:** 44m UK users, still strongest for local communities.
- **Instagram:** 35m UK users, with fastest growth among 25-44.
- **TikTok:** 23m UK users, dominant with 16-24s, growing in older groups.
- **YouTube:** 56m UK users monthly; Shorts now rival TikTok.
- **LinkedIn:** 35m UK users, often overlooked but critical for funders, partners, trustees.
- **WhatsApp:** 40m UK users, with Channels opening new broadcast possibilities.

Pick content pillars so you never run dry

Pillars are your **repeatable themes**. They stop you scrambling for ideas and keep the feed balanced. For most charities, repeatable content will include :

- **Help & How-to** - practical steps, "what to expect" posts.
- **Impact & Proof** - what changed because of your work.
- **People & Partners** - volunteers, staff, lived experience (with consent).
- **Join In** - events, donations, applications.
- **Values & Voice** - myth-busting, thought leadership, solidarity.

Rotate them. A pillar that doesn't serve outcomes this quarter? Park it.

Be realistic about rhythm and roles

Social shouldn't eat every hour. A realistic week for a small team looks like:

- 2–3 posts on your main channel.
- 1 post on a secondary channel.
- A couple of stories, reels, or shorts when helpful.

Consistency beats heroic bursts. Protect 60–90 minutes a week for social and treat it as a habit, not an afterthought – because regular presence builds trust, while sporadic activity makes you invisible.

Think in hats, not job titles:

- Planner (sets outcomes and pillars)
- Creator (drafts copy and assets)
- Publisher (schedules and checks links)
- Responder (answers comments and DMs)
- Recorder (notes results and learning)

One person may wear them all - just name the hats so the work is visible and easier to share.

Consent, dignity, and safeguarding

Human stories work - but only when shared with care. Always:

- Ask for informed, specific, time-limited consent.
- Offer choices (named vs. anonymous; text vs. photo vs. video).
- Explain where content will appear and for how long.
- Log consent in one place.
- Respect people's right to change their mind.

If in doubt, don't post. Composites or staff reflections are safer than risking dignity.

Minimum Legal Ages for Social Media Platforms

- TikTok – 13+ (some features restricted until 16+)
- Instagram – 13+
- Facebook – 13+
- Snapchat – 13+
- X (Twitter) – 13+
- WhatsApp – 16+ in UK/EU (13+ in some other regions)
- YouTube – 13+ (or under 13 with YouTube Kids + parental consent)
- Pinterest – 13+
- Discord – 13+ (17+ in some app stores due to content rating)

Charity Case Study – Ready in Practice

Food Train Scotland

Food Train (Scotland) faced a volunteer shortage in early 2024. Instead of blasting generic recruitment posts, they narrowed their focus: one outcome ("Recruit 100 new volunteers in 12 weeks"), one channel (Facebook), and one content pillar (human stories of current volunteers). By pairing short Reels filmed on phones with a simple "Join Us" landing page, they filled 80% of their target within 10 weeks. Their learning? **Focus beats scatter. Awareness only mattered when it led to actual sign-ups.**

Helpful Resources

CharityComms - Social media strategy templates

NCVO Know-How - Comms planning and policies

Meltwater UK 2025 Social Media Report

RNIB Accessibility Guides

SCVO Digital & Cyber Security resources

Digital Unstuck - practical starter prompts for content
and more

Section 2.

Set!

*(Govern well, post
with confidence)*

Set!

Good governance doesn't kill creativity - it enables it. When your team knows the boundaries, the approval paths, and the safety nets, they post with confidence and authenticity. Without guardrails, fear and risk-aversion creep in, and posts get stuck in endless drafts.

Why a short policy makes everything easier

A **20-page social media policy** will sit on a shelf unread. A **2-page guide** will actually get used. Keep it tight and focus on:

- Why you use social media.
- Who it applies to (staff, volunteers, trustees, contractors).
- Key principles (accuracy, accessibility, dignity, political neutrality).
- Roles and responsibilities (planner, publisher, responder, safeguarding lead).
- House rules for followers (what you welcome, what you won't tolerate).
- Escalation paths for safeguarding, complaints, or data breaches.

Publish house rules publicly so the community knows what's expected. Keep them plain and visible.

House Rules (copy + adapt)

We welcome respectful discussion. We will remove content that includes hate speech, harassment, misinformation, spam, or personal details. For urgent support, contact us at [inbox/phone]. In an emergency, call 999.

Roles, responsibilities, and approvals

Confusion about “who does what” is one of the biggest blockers in charity comms.

Be explicit:

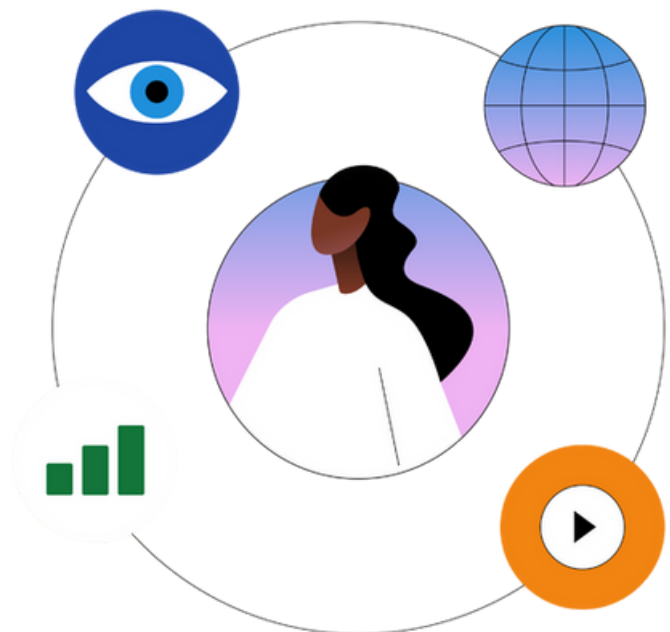
- **Account Owner** - manages logins and admin rights.
- **Publisher** - schedules and posts content.
- **Responder** - monitors comments/DMs, escalates when needed.
- **Safeguarding Lead** - decides on child/vulnerable adult concerns.
- **Data/GDPR Lead** - handles data breaches or removal requests.
- **Content Generators** - staff and colleagues actively feed into content creation

Name a backup for each. In small teams, one person may wear multiple hats - but naming them makes the work visible.

Pitfall: Overly long approval chains. Long sign-offs kill more good ideas than bad ideas ever will.

Keep it lean:

- Day-to-day posts: 1 sign-off (or none once trained).
- Sensitive/campaigning posts: 2 sign-offs max.
- Crises: pre-agreed holding statements so you don't freeze.



Consent, dignity, and data

Human stories work best – but only when **offered, not taken**. Follow three rules:

- **Informed:** explain where, how, and how long content will be used.
- **Specific:** give people choices (named vs anonymous, photo vs text).
- **Time-limited:** consent expires; log it in one place.

If you use AI tools to edit or repurpose stories, be transparent about it and keep human oversight. Trustees should understand where AI is used in your comms workflow, and boards should record decisions in line with wider digital governance. Check the [Scottish AI Playbook](#) for best practice.

If someone withdraws consent, act quickly. If in doubt, don't post.

Moderation that protects people and your mission

Your social channels are community spaces. Think of yourself as host, not gatekeeper. Apply house rules consistently – and make sure they reflect your organisation's values, so your online spaces feel aligned with who you are offline

- Frustrated service user? Acknowledge and offer to move to a private channel.
- Misinformation? Correct calmly with a reliable source.
- Harassment/hate speech? Remove and block.
- Safeguarding concern? Escalate immediately.
- Journalist questions? Thank and hand to your press lead.

Security and cyber resilience

Most breaches come from simple errors: weak passwords, old admins, no two-factor authentication. Protect yourself with:

- Password manager for staff.
- Two-factor authentication on every account.
- Remove leavers' access the same day.
- Keep a channel register with owners, purpose, and admin list.

Campaigning and political activity

Charities **can campaign** on issues linked to their purpose – but must stay independent of political parties and candidates. This matters most in an election season, when scrutiny is particularly high.

- Keep comms factual and respectful.
- During elections, have a **short internal approval route** for sensitive posts.
- Record decisions and rationale.

[See OSCR campaign guidance here.](#)

Crisis and escalation

You don't need a 30-page crisis manual. You do need a one-page checklist:

- Who to call first (safeguarding, CEO, data, press).
- How to pause scheduled posts.
- Draft holding statement: *"We're aware of X, we're looking into it, and will update by Y."*
- How to log what happened.
- **Internal comms:** send a quick update so staff and volunteers know the agreed line and don't feel left in the dark.
- **Care for people affected:** if service users, victims, or staff are involved, prioritise their safety and wellbeing before posting publicly.
- Run a quick "fire drill" once a quarter so the team knows it under pressure.

It's likely that your leadership team and your organisation's risk register will already have a wider crisis plan in place – social media should play a key part of this. Use the one-pager to capture the essentials (contacts, steps, draft statements) and make sure it links back to your organisation's broader plan so everything joins up.

Where social can go wrong

- **Awareness obsession:** chasing likes and impressions with no link to action.
- **Over-scheduling:** posts go out during a crisis because no one paused the queue.
- **Neglecting moderation:** harmful comments left unchecked.
- **Tokenism:** posting on Pride, Black History Month (BHM), or International Women's Day (IWD) with no substance behind it.
- **Burnout:** one staff member expected to be "always on."

Acknowledging pitfalls makes you safer.

Shift Your Culture

Long approval chains kill more good posts than bad ideas ever will. The **Charity Change Collective's** *Toolkit for Transformation* shows how to build trust, shorten sign-offs, and empower teams to act faster.

It's packed with behaviours and examples you can adapt for your own organisation.

[Read the Toolkit for Transformation](#)

Charity Case Study – Governance in Action

Mind (UK) publishes clear **house rules** on all its social platforms, outlining what is and isn't acceptable, and how people can access support if they're in crisis. They also share their moderation approach openly, which builds trust with audiences and reduces accusations of censorship. The result? A safer, more supportive space for service users and campaigners alike.

Helpful Resources

CharityComms - Social media policy templates

NCVO Know-How - comms policies and planning

SCVO Digital & Cyber Security resources

OSCR - Campaigning & political activity guidance

SCVO - What charities can or can't do in run up to an election

Section 3. Go!

*(Create, publish, and
build community)*

Go!

This is the fun bit – but also the place where most charities get stuck. With the right prep in place, you can focus on creating content that's useful, human, and easy to act on.

Lead with usefulness

The best question before posting is: **"Who is this for, what do they need today, and what action do we want them to take?"** If you can't answer that in one sentence, the post isn't ready.

People don't follow charities for filler. They follow for answers, help, hope, or a clear way to get involved.

Tell human stories (safely)

Stories work because they make causes relatable. But stories aren't just assets to harvest. They're **gifts of trust**.

- Keep stories simple: person → challenge → support → difference made → invitation to others.
- Always gain informed, specific, time-limited consent.
- Offer options (named/anonymous; text/photo/video).
- Respect people's dignity – no trauma porn, no pity framing.

Choose formats that make action easy

- Short-form video (reels, TikTok, shorts): 20–60 seconds, captions baked in, one clear action.
- Carousels: step-by-step guides, myth-busting, countdowns. First slide = promise, last slide = call-to-action.
- Stories/ephemeral: event reminders, polls, Q&A.
- Graphics: only when they clarify – not just decorate.
- Longer-form (YouTube, LinkedIn): explainers, reports, thought leadership.

Checklist - Is this format fit for purpose?

Does it suit the audience's habit on this channel?
Is the call-to-action clear?
Is it accessible (captions/alt text/high contrast)?

Hope-based comms

Not every serious issue needs heavy tone. Hope, solidarity, and shared wins can be just as powerful. A positive frame can make action feel possible, not overwhelming.

[Read the strategy.](#)

Captions that convert (without sounding salesy)

Write like you talk. Lead with benefit. Ask for one action.

Patterns to try:

- **Help → How → Do:** "Free warm spaces near you this week. Five locations, 10–4. Tap to book."
- **Problem → Path → Proof:** "Worried about rent? Book a 20-minute call. Last month, we helped 41 families reduce payments."

Editorial rhythm you can keep

A good social media plan isn't about doing more - it's about finding a rhythm you can actually stick to. Small, regular habits build momentum and trust far more than one-off bursts of activity.

- 10 minutes weekly → review last week, note keep/stop/start.
- 30 minutes weekly → draft and schedule 2–3 posts.
- 15–30 minutes weekly → reply to comments/DMs, tidy links.

Pitfall: Heroic bursts followed by silence. Momentum comes from rhythm, not volume.

Reuse winners until they're done

If a post lands, adapt it:

- Carousel → short Reel → LinkedIn post → local FB Group version → WhatsApp reminder.
- Same message, adapted for context. That's **alignment**.
- AI tools can speed this up by drafting variations for different channels, but always review so the tone stays true to your organisation's voice.

AI in Practice: Repurpose, Don't Replace

How AI can help charities right now:

- **Summarise:** turn a 2-page blog into three caption options.
- **Reframe:** adjust tone for Instagram vs LinkedIn.
- **Repurpose:** lift key points from a transcript for a carousel.
- **Translate:** produce draft versions in other languages (always review with a human).
- **Draft:** generate caption variations, then edit to keep your voice.

Prompting tips that work:

- Be specific: "Write a LinkedIn caption for funders about X in a professional but hopeful tone."
- Give context: paste your blog, transcript, or old post so it has source material.
- Ask for options: request three variations, not one, so you can choose.
- Edit ruthlessly: keep what's useful, cut the fluff, and add your own voice.

Checklist - AI Golden Rules

- ☐ Use it for first drafts, not final posts.
- ☐ Always review for accuracy, accessibility, and dignity.
- ☐ Be transparent internally about when and how it's used.
- ☐ Link to the Scottish AI Alliance Playbook for governance.
- ☐ Explore CAST's Library of AI Experiments for real charity use cases.

[CAST's Library of AI Experiments](#) shows real charities testing AI tools for captioning, translation, and drafting.

Paid and organic must work together

Organic content still matters for building relationships, authenticity and trust. But in 2025, unsponsored posts often reach just 1–4% of followers on major platforms.

For charities, that means:

- Test content organically first to find what resonates.
- Then consider paid promotion of posts that perform well or campaigns with specific goals.
- Treat paid as essential, not optional if you want consistent reach and impact.
- Keep your targeting tight (postcode, age, interest) and stick to one objective, one creative, one landing page.
- If the landing page doesn't convert, fix it before spending more.

Where social can go wrong (content edition)

- Over-designed graphics with no human element.
- Awareness posts with no call-to-action.
- Chasing trends that don't fit your cause.
- Posts signed off two weeks late – published after the moment passes.

Charity Case Study – Social Done Simply

Bloody Good Period

Bloody Good Period built much of its growth by pairing sharp Instagram carousels with simple calls-to-action ("Here's how to donate products this week"). Their posts blend information, activism, and humour without slipping into tokenism. They use their feed to campaign, their stories to mobilise, and their captions to link directly to tangible action. The result? A community that not only shares but also **acts**.

Helpful Resources

Hope-Based Comms Toolkit

Charity Digital - 101 TikTok

Google Ad Grants

CharityComms - How to write captions that convert

Meltwater UK 2025 Social Media Report

Scottish AI Playbook

[CAST AI Experiments](#)

Section 4. Measure! *(Learn, improve, repeat)*

Measure!

Measurement isn't about charts for the sake of it. It's about **learning what helps your mission and doing more of that**. Too many charities still confuse awareness with impact. A post with 5,000 impressions but zero sign-ups is noise. The question isn't "how many people saw this?" but "**did this change anything in the real world?**"

Outcomes first, metrics second

- Likes and views are vanity metrics unless they connect to action.
The true measures for your organisation might look like:
- Bookings filled
- Applications received
- Donations made
- Volunteer sign-ups
- Policy actions taken (emails sent, petitions signed)

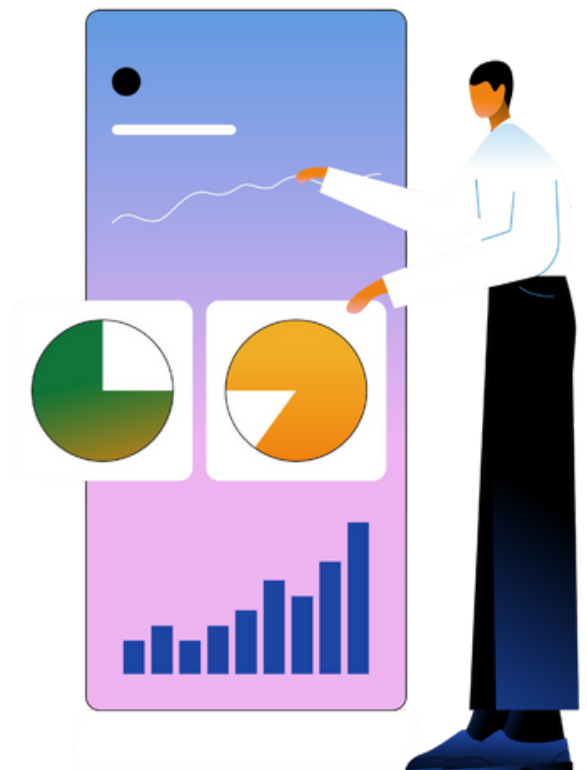
Awareness is a starting point, not a success metric.

Keep tracking light but consistent

You don't need a dashboard army. You need a simple habit.

Checklist - Minimal tracking set-up

- ☐ Add UTM tags to every link so you know which post drove traffic.
- ☐ Test your landing pages on mobile - are they quick and clear?
- ☐ Screenshot highlights from platform analytics weekly.
- ☐ Set up 2-3 GA4 goals (donations, forms, downloads).
- ☐ Ask "How did you hear about us?" on sign-up forms.
- ☐ Use AI tools to summarise performance data into plain-language takeaways – but always interpret results with human judgement.



Review in a rhythm you can keep

- **Weekly glance:** 5 minutes - what post stood out? Screenshot it.
- **Monthly review:** 30 minutes - check results against outcomes. Note keep/stop/start.
- **Quarterly reflection:** adjust outcomes, revisit content pillars, run a "crisis fire drill."

Pitfall: drowning in data. If you're tracking 20 numbers but acting on none, simplify.

Share learning across the team

Social media isn't just a comms job. Bring the whole team into the loop.

- 5-minute slot in staff meeting: "One post that worked, one learning, one experiment next month."
- Trustees: one-page summary (outcome, result, screenshot, next step).
- Funders: focus on real-world impact - not reach alone.

Sharing results builds trust internally as well as externally.

Transparency builds credibility

Audiences expect openness. Don't just share polished success stories – share the process, too. Post about what didn't work, what you learned, and what you'll try differently. It shows honesty and builds trust.

Charity Case Study – Transparency

Shelter UK

Shelter UK uses its blog and socials not just to celebrate wins but also to talk about the ongoing scale of housing need, even when progress is slow. That transparency positions them as a trusted, honest voice in a crowded debate.

Transparency builds credibility

Most charities don't struggle with measuring – they struggle with measuring the right things. Common mistakes turn data into noise instead of insight, and can leave boards celebrating reach while missing what really matters: outcomes and learning.

- Measuring everything → acting on nothing.
- Reporting reach to trustees without outcomes.
- Failing to test landing pages – good posts die on bad forms.
- Treating negative feedback as failure rather than learning.

See AI in Action

Want to know how other charities are already experimenting with AI? CAST has built a **Library of AI Experiments** - real nonprofit examples of AI used for captions, translations, content drafting, summarisation and more.

It's a practical way to spark ideas before you launch your own trial.

Charity Case Study – Light but effective measurement

Breast Cancer Now

Breast Cancer Now shifted from reporting impressions to focusing on actions. For their “Wear It Pink” campaign, they tracked one thing: sign-ups. By tagging every link and simplifying the sign-up page, they could clearly see which posts worked. The winning content? Short videos from staff and supporters explaining why they take part. Sign-ups rose 15% year on year.

Helpful Resources

Google Analytics 4 - Conversions and goals

Charity Digital - How to measure digital impact

NCVO - Impact and evaluation guidance

Shelter UK blog (example of transparent comms)

Breast Cancer Now - Wear It Pink campaign

Section 5. Resources & Quick Reference

Resources & Reference

Good systems save time. Instead of reinventing the wheel for every campaign, keep your **core resources in one shared folder**. That way, when someone new joins the team – staff, trustee, or volunteer – they can pick up the essentials quickly and confidently.

Build your “/Social Governance” folder

This should be the home for everything you need to run social media well. Keep it in a shared, secure space (Google Drive, OneDrive, SharePoint, etc.) that’s easy to update.

Checklist - What to include in Social Governance

- ☐ **Social media policy (2 pages)** - plain English, used daily.
- ☐ **Channel register** - what accounts exist, why, and who manages them.
- ☐ **Consent log** - names/IDs, dates, scope, expiry, restrictions.
- ☐ **Moderation crib sheet** - one-page “if X, then Y.”
- ☐ **Crisis one-pager** - who to call, how to pause posts, draft holding statement.
- ☐ **Accessibility cheatsheet** - alt text, captions, colour/contrast.
- ☐ **Onboarding/leavers checklist** - add/remove access, training, sign-offs.
- ☐ **Story capture form** - with consent options people can understand.



Quick Reference – Desk Printable

A one-page poster you can stick above your desk, or share with colleagues.

Before you post:

- Who is it for?
- What do they need today?
- What action do we want?
- Do audience → channel → content line up?
- First line = benefit?
- Webpage = mobile-friendly?

Make it human and accessible:

- One message per post.
- One clear action.
- Plain English.
- Alt text & captions every time.

Caption patterns:

- Help → How → Do.
- Problem → Path → Proof.

Reuse winners:

- Carousel → Reel → LinkedIn post → FB Group version → WhatsApp reminder.

Moderation basics:

- Acknowledge.
- Move sensitive chats to safe private channels.
- Apply house rules consistently.

Measurement rhythm:

- Weekly glance.
- Monthly outcomes check.
- Quarterly keep/stop/start.

Charity Case Study – Resources Done Well

Crisis (UK homelessness charity).

Crisis (UK homelessness charity) has a public-facing **media centre** that doubles as a comms resource hub. It includes house rules, brand guidelines, downloadable assets, and key messages. By making resources open, they reduce internal bottlenecks, keep messaging consistent, and empower staff and partners to share confidently.

Bringing it all together

You don't need a bigger megaphone. You need **clarity, care, and consistency.**

Pick a few outcomes that matter. Go where your audiences already are. Share human stories with dignity. Make the next step obvious. Keep content accessible. Measure lightly and adjust as you learn. And above all – back your comms people with trust, resources, and governance.

If you're starting today, keep it simple: one outcome for four weeks, one main channel, two helpful posts a week, one short landing page, and a weekly review. That's enough to build momentum. Add from there.

Additional Resources

CharityComms - Social media policy and strategy guides

NCVO Know-How - comms and impact templates

Charity Comms - Social Media Updates

SCVO - Digital & cyber security resources

RNIB Accessibility guidance

OSCR - Campaigning and political activity guidance

Training & Skills

[Third Sector Lab - free digital, data and design training.](#)

[HubSpot](#)

Templates & Worksheets

How to Use This Bundle

These templates are designed to save time and reduce friction. They give you simple structures for planning, governance, and day-to-day social media practice.

They're not meant to be prescriptive. Every charity is different - your audiences, outcomes, and capacity won't look the same as another organisation's. Think of these as starter tools: copy and paste them into a Google Doc, adapt them into a shared spreadsheet, drop them into Notion or Trello, or print them out for team meetings. The point is to make them yours, not to follow them word-for-word.

The most effective use of these templates is collective: share them with colleagues, trustees, and volunteers so digital stops being "one person's job" and becomes part of how the whole organisation communicates and learns.

Disclaimer

This guide – and the templates included – has been created by OSCR and Third Sector Lab to provide practical help for charities navigating social media in 2026.

It is not legal advice. Every charity is responsible for making its own decisions about how it communicates and operates online. You should always:

- Check your use of these tools against your charity's policies, safeguarding procedures, and legal obligations.
- Seek independent legal, data protection, or safeguarding advice where necessary.
- Remember that your trustees hold ultimate responsibility for ensuring your charity complies with the law and acts in line with its purpose.

Use this guide as a foundation – but **own your choices**. The best governance and the best content are the ones that fit your mission, your audiences, and your capacity.

1. Outcome Planning Worksheet

(From Section 1: Ready!)

Outcome statement	Timeframe	Action required	Landing page link	Success measure	Owner
Example: "Recruit 40 volunteers by 15 Dec"	8 weeks	4 social posts, 2 FB group shares	volunteers.org/apply	# of applications received	Alex

2. Audience Snapshot Worksheet

(From Section 1: Ready!)

Audience group	Needs	Barriers	Channels	Tone & format
Parents of under-5s (Renfrewshire)	Timetables, reassurance	Transport, childcare, digital confidence	FB Groups, WhatsApp	Friendly, simple carousel

3. Channel Decision Grid

(From Section 1: Ready!)

Channel	Audience here?	Serves outcome?	Capacity to moderate?	Decision
Facebook	✓	✓	✓	Keep
TikTok	✗	✗	-	Park
LinkedIn	✓	✓	✓	Prioritise

4. Content Pillars Worksheet

(From Section 1: Ready!)

Pillar	Purpose	Example formats	Call to action
Help & How-to	Answer recurring questions	Reels, carousels	"Book now"
Impact & Proof	Show what changed	Short video	"Donate"
People & Partners	Highlight volunteers/staff	Stories, photos	"Join us"
Join In	Mobilise action	Event posts	"Sign up"
Values & Voice	Myth-busting, thought leadership	Threads, blogs	"Share"

5. Role-Hats Worksheet

(From Section 1: Ready!)

Hat	Responsibilities	Named person	Backup
Planner	Sets outcomes & pillars	Sam	Trustee rep
Creator	Drafts copy, edits video	Alex	Volunteer
Publisher	Schedules, checks links	Alex	Sam
Responder	Monitors comments/DMs	Sam	CEO
Recorder	Notes results, shares learning	Alex	Admin

6. Consent Log Template

(From Section 1: Ready! & Section 2: Set!)

Name/ID	Date	Scope (where used)	Expiry date	Restrictions	Removal date
J.S.	10/01/2026	Website + socials	10/01/2027	Anonymous only	-

7. Moderation Crib Sheet

(From Section 2: Set!)

If you see...

- Frustrated service user → Acknowledge, move private.
- Misinformation → Correct calmly with reliable source.
- Harassment/hate speech → Remove, block, log.
- Safeguarding concern → Escalate to Safeguarding Lead.
- Journalist enquiry → Hand to press contact.

8. Crisis One-Pager

(From Section 2: Set!)

Step 1: Pause all scheduled posts.

Step 2: Notify: Safeguarding lead, CEO, Data lead, Press contact.

Step 3: Holding statement: "We're aware of [situation]. We're looking into it and will update by [time]."

Step 4: Log actions taken.

9. Accessibility Cheatsheet

(From Section 1: Ready! & Section 2: Set!)

- Plain English
- Alt text for every image
- Captions/subtitles for every video
- CamelCase hashtags
- High-contrast colours
- Avoid flashing/fast cuts

10. Onboarding/Leavers Checklist

(From Section 2: Set!)

Onboarding: add to password manager, grant access, share policies, assign hats.

Leavers: remove access same day, update channel register, transfer hats.

11. Story Capture Form

(From Section 1: Ready! & Section 3: Go!)

Person's name (or anon ID):

Story (in their words):

Consent (tick):

- Person's name (or anon ID): Name / anonymous
- Photo / video / text only
- Where used (website, socials, print)
- Expiry date

Signature/verbal consent logged: _____

12. Caption Writing Worksheet

(From Section 3: Go!)

Post idea: _____

Pattern: Help → How → Do OR Problem → Path → Proof

First line (benefit): _____

Call-to-action: _____

Hashtags (max 5): _____

Accessibility check: Alt text? Captions? Plain English?

13. Quick Reference Poster

(From Section 5: Resources)

Before you post: Who's it for? What's the need? What action?

Golden rules: Plain English. One clear action. Alt text & captions.

Caption patterns:

Help → How → Do.

Problem → Path → Proof.

Moderation: Acknowledge → Move private → Apply rules.

Measurement: Weekly glance → Monthly check → Quarterly review.

OSCR
Scottish Charity Regulator

