

Social Media Audit for Historical & Genealogical Societies

Review how your society's social media supports members, programs, and community connection.

Use this audit to spot a few useful updates. You don't need to change everything at once.

1. Revisit your society's goals

What should social media help your society do?

- Keep members informed and involved
- Welcome prospective members
- Promote meetings, programs, and events
- Share local history, genealogy, or society news
- Highlight collections, projects, or member contributions
- Connect with libraries, archives, educators, or community groups
- Encourage volunteers or other support
- Other: _____

Which goal is the priority right now?

Who are you hoping to reach?

- Current members
- Potential members
- Family historians and genealogists
- Local history enthusiasts
- Educators and students
- Community partners
- Other: _____

2. Review your society profiles

Look at the social media accounts your society maintains.

Platform or account	Profile is current?	Society purpose is clear?	Membership, event, or contact details are easy to find?
_____	Yes / Update	Yes / Update	Yes / Update
_____	Yes / Update	Yes / Update	Yes / Update
_____	Yes / Update	Yes / Update	Yes / Update

Check each item that applies:

- The society's name and profile image are current.
- The profile explains what the society does and whom it serves.
- Membership information is accurate and easy to find.
- Event or program details link to current information.
- Contact details and website links work.
- We know what information is public.

One profile update we may make:

3. Review your content

Think about the society's recent posts.

- We share event announcements with enough information to act.
- We post reminders and follow-ups for programs.
- We share local history, genealogy, or collection highlights.
- We feature members, volunteers, or society projects.
- Our posts invite people to participate or respond.
- Captions provide context for photos and historical materials.
- We credit sources and creators when appropriate.
- We have permission to share photos, documents, and personal stories.
- Our content is readable and accessible, including image descriptions or captions where useful.

Which recent post seemed especially useful to members or the community?

What kind of content would you like to share more often?

4. Review engagement and community care

- We know who checks and responds to comments and messages.
- We respond within a timeframe we can sustain.
- We have guidelines for moderating comments or group discussions.
- We know how to handle spam, conflict, or inaccurate information.
- We welcome questions from people who are new to the society.
- We know when to move a conversation to a more appropriate channel.

What would help your society respond or moderate more confidently?

5. Review account access and volunteer process

- At least two trusted people have appropriate account access.
- Access and recovery information are stored securely.
- We know who owns or administers each account.
- We have a process for transferring access when a volunteer steps down.
- Volunteers know who can review and publish posts.
- We have a shared place for approved images, logos, and event details.

What needs clarification?

6. Check your routine and results

- How often are we posting?
- Is that pace manageable for our volunteers?
- Which posts lead to useful questions, attendance, membership interest, or participation?
- Are we focusing on platforms our members and intended audiences use?
- What could we simplify, plan ahead, or stop doing?

One sign that social media is supporting the society:

One part of the process we could make easier:

7. Choose your next steps
Select one or two actions:

- Update a society profile or link.
- Make membership or event information easier to find.
- Plan a mix of announcements and community content.
- Add context or attribution to collection highlights.
- Review permissions for photos and stories.
- Clarify who responds to messages and comments.
- Confirm account access and backup administrators.
- Set a posting rhythm volunteers can maintain.
- Other: _____

Our first next step: _____

Who will take it? _____

When will we do it? _____

Your society's social media should help people feel informed, welcomed, and connected. Revisit this audit as your programs, volunteers, or goals change.