Choosing Platforms for Your History or Genealogy Organization

Choose social media platforms that help your organization advance its mission, reach the people it serves, and build lasting community connections.

Your organization doesn't need to be on every platform. Focus on the channels that fit your audiences, goals, and capacity.

1. What do you want social media to help your organization do?
Check any that fit:

- Raise awareness of our mission and work
- Reach people who may benefit from our programs or services
- Share educational content, stories, or research
- Promote events, campaigns, or initiatives
- Connect with members, supporters, or volunteers
- Build partnerships with other organizations
- Encourage donations, membership, or participation
- Share news, announcements, and organizational updates
- Other: _____

Which goal is most important for the next six months?

How will we recognize progress toward that goal?

2. Who does your organization want to reach?
Your organization may serve more than one audience. Check the groups that matter:

- Members
- Potential members or supporters
- Family historians and genealogists
- Professional genealogists
- Historical or genealogy societies
- Educators and students
- Libraries, archives, museums, or cultural institutions
- Funders, sponsors, or community partners
- The general public
- Other: _____

Which audience is the priority right now?

What would you like that audience to do after seeing your posts?

- Learn about our mission or services
- Attend an event or program
- Join, volunteer, or participate
- Share our information with others
- Subscribe, donate, or support our work
- Connect with us or a partner organization
- Other: _____

3. What content can your organization share?
Check the types of content your team could create or gather:

- Mission-related education and information
- Program, event, or campaign announcements
- Stories that show our work and its impact
- Organizational news and updates
- Member, volunteer, staff, or partner spotlights
- Historical or genealogical content
- Behind-the-scenes updates
- Calls for volunteers, participants, or submissions
- Links to publications, services, or resources
- Other: _____

Which two content areas best support your current priority?

1.
2.

What content requires special review before publication—for example, because it involves privacy, permissions, accessibility, or sensitive topics?

4. What capacity and coordination do you have?

Who will contribute to and manage the organization's social media?

- One staff member or volunteer
- A communications team
- Several departments or committees
- A communications partner or contractor
- We need to define responsibilities

How much time can the organization realistically dedicate each week?

- 30 minutes or less
- About an hour
- A few hours
- It varies by campaign or event

What process would make the work clearer?

- A shared content calendar
- A named account owner and backup
- A review and approval process
- A shared library of approved logos, images, and descriptions
- Guidelines for staff, volunteers, or partners who post
- Other: _____

5. Consider account stewardship and organizational needs

Before choosing or expanding platforms, discuss:

- Who owns and administers each account?
- Are account access and recovery details managed securely?
- Is there a backup administrator?
- Who can create, review, and publish posts?
- How will account access transfer when staff or volunteers leave?
- Who responds to public questions, comments, and messages?
- What is the process for correcting an error or addressing a sensitive issue?
- Do our policies address privacy, permissions, accessibility, and records retention?

What needs clarification?

6. Compare a few platform options

Consider your priority audience, organizational goals, team capacity, and the kinds of content you can maintain. Review each platform's current features and account options before deciding.

Platform or community	Priority audience we could reach	Organizational goal it supports	Time, skills, and coordination needed	Does it fit?
				Yes / Maybe / No
				Yes / Maybe / No
				Yes / Maybe / No

7. Choose where to begin
The platform or platforms we'll prioritize are:

We're choosing them because:

Our profiles should clearly explain:

- Who we are and what our mission is
- Who we serve
- What programs, services, or opportunities we offer
- How to participate, get involved, or support our work
- How to contact us
- Where to find current, detailed information

Our first post or campaign could be:

- An introduction to our organization and mission
- A program, event, or initiative announcement
- A story that illustrates our work
- A partner or community spotlight
- An invitation to participate, volunteer, or support us
- Other: _____

8. Review your choice
After using the platform for a month or two, review:

- Are we reaching the audience we prioritized?
- Does the content support our mission and current goals?
- Are people taking useful next steps?
- Can the team keep up with publishing and responses?
- Are account responsibilities and review steps working?
- What should we continue, adjust, or pause?

Our next step: _____

Choose platforms your organization can manage well and use to build meaningful connections around its mission. Start with a clear audience, a practical goal, and a manageable publishing rhythm.