Social Media Audit for History & Genealogy Organizations

Review how your organization's social media supports its mission, serves its audiences, and helps people connect with its work.

Use this audit to identify a few practical improvements. You don't need to change everything at once.

1. Revisit your goals and audiences

What should social media help your organization do?

- 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, and initiatives
- Connect with members, supporters, or volunteers
- Build partnerships with other organizations
- Encourage participation, membership, donations, or other support
- Share organizational news
- Other: _____

Which goal is the priority right now?

Which audience is the priority?

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

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

2. Review your profiles
Look at the social media accounts your organization maintains.

Platform or account	Profile is current?	Mission and audience are clear?	Contact, program, or next-step links work?
_____	Yes / Update	Yes / Update	Yes / Update
_____	Yes / Update	Yes / Update	Yes / Update
_____	Yes / Update	Yes / Update	Yes / Update

Check each item that applies:

- Our name, logo, and profile details are current.
- Our description explains what we do and whom we serve.
- Our programs, services, or participation opportunities are clear.
- Our contact details and links are accurate.
- We know what profile information is public.
- Our voice and visual identity are reasonably consistent across accounts.

One profile update we may make:

3. Review your content and mission alignment
Think about recent posts:

- Our content connects to our mission and current priorities.
- We share information that is useful to our audiences.
- We balance announcements with stories, education, and community content.
- Our calls to action are clear and appropriate.
- Posts use plain, understandable language.
- We credit sources, partners, and creators when appropriate.
- We have permission to share photos, stories, and materials.
- We consider privacy and sensitivity before posting.
- Images, videos, and links are accessible where possible.

Which recent post best reflected your organization's mission?

What content would you like to create or share more consistently?

4. Review accessibility and inclusion

- Images have useful descriptions when needed.
- Videos have captions or transcripts when available.
- Graphics use readable text and sufficient contrast.
- Posts avoid unnecessary jargon or explain specialized terms.
- Our content reflects the range of people and communities we serve.
- We consider who may be left out by our language, images, or posting practices.

What is one accessibility or inclusion improvement to prioritize?

5. Review team coordination and account stewardship

- Account ownership and administrator access are clear.
- At least two trusted people can help maintain account access.
- Login and recovery information are stored securely.
- Staff, volunteers, and partners know who can draft, review, and publish.
- We have a process for approvals, corrections, and urgent issues.
- Someone is responsible for monitoring and responding to messages.
- Account access is updated when roles or staffing change.

What responsibility or process needs clarification?

6. Check your engagement and results

- We respond to questions and messages within a reasonable timeframe.
- We know how to handle disagreement, misinformation, or sensitive comments.
- We coordinate cross-promotion with partners when appropriate.
- We review basic platform insights periodically.
- We look at meaningful actions, not only likes or follower counts.
- We use what we learn to adjust content or channel choices.

Which results matter most for your current goal?

- Event attendance
- Program or service inquiries
- Membership or volunteer interest
- Resource use or website visits
- Partner engagement
- Community conversation
- Other: _____

What is one sign social media is helping your organization?

7. Choose your next steps

Select one or two actions:

- Update a profile or key link.
- Clarify the audience and goal for each account.
- Plan content around a current organizational priority.
- Improve accessibility in posts and media.
- Review permissions and privacy practices.
- Clarify account access and publishing responsibilities.
- Set a process for responding and moderating.
- Review insights and choose a useful measure.
- Other: _____

Our first next step: _____

Who will take it? _____

When will we do it? _____

Your organization's social media should help people understand your work and find a way to connect with it. Revisit this audit as your mission priorities, audiences, or team change.