

CASE Summit 2011

Findings and Reflections

2011 CASE/MSTONER/SLOVER LINETT SOCIAL MEDIA SURVEY

11 July 2011

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Agenda

- ▶ Research overview
- ▶ Major themes
 - ▶ Success
 - ▶ Management & staffing
 - ▶ Policies & guidelines
- ▶ Implications/Lessons Learned
- ▶ Discussion

Overview

- ▶ **Purpose:** learn how institutions are using, managing and measuring social media
- ▶ **Sponsors:** CASE, mStoner, Slover Linett
- ▶ **Methods:** Link emailed to 18,000 representative CASE members; 951 responses
- ▶ **Second annual study**

Everyone's on board

- ▶ Nearly all use Facebook (96%)
- ▶ About 3 in 4 use Twitter
- ▶ Two-thirds use LinkedIn or YouTube
- ▶ About 40% have blogs, use Flickr or offer a social community via an outside vendor
- ▶ Only 4% weren't using any social media

We like SM, but haven't fully embraced it

- ▶ **Most (73%) believe SM have great potential for achieving their goals**
 - ▶ Fewer have institutional support & buy-in (45%) or expertise for SM efforts (28%)
- ▶ **We use SM to sustain our brands (90%)**
 - ▶ But we're also very motivated by external factors like constituent demand (79%) or competition from peer institutions (84%)

What we hope to achieve

- ▶ **Top goals overall**
 - ▶ Engage alumni (84%)
 - ▶ Strengthen brand image (75%)
- ▶ **Marketing also uses SM to**
 - ▶ Engage prospective & admitted students (68% and 63%)
 - ▶ Increase awareness and rankings (61%)
- ▶ **Development more likely to use SM to engage alumni (86%) than raise funds (38%)**

What we're *not* doing with social media

- ▶ Recruiting faculty and staff
- ▶ Crisis management
- ▶ Raising private funds
- ▶ Conducting audience research
- ▶ Engaging the media

How SM use varies by geography

US

- ▶ Engage parents, prospects, donors more
- ▶ Use YouTube more
- ▶ Have more institutional buy-in
- ▶ Have more in-house expertise

International

- ▶ Control more of their own activities
- ▶ Use LinkedIn more
- ▶ Want to be more playful
- ▶ More influenced by others' success stories

How SM varies by institutional size

Large

- ▶ Use Twitter, Flickr & YouTube more
- ▶ Target government more

Small

- ▶ Use a social network aggregator site or in-house community tool (e.g. Ning) more
- ▶ Target parents, friends + supporters, alumni, prospects and students more
- ▶ More centralized
- ▶ More influenced by peer SM activity

Major Themes

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1. Success

How successful are our SM activities?

- ▶ Moderately successful (62%); very successful (25%)
- ▶ Main success metric = number of “touches” (friends, click-throughs, participation)
- ▶ Facebook is most successful platform (87% compared to 27% for next most successful platform, Twitter)

1. Success

Characteristics of institutions that succeed with SM

- ▶ Have specific goals
- ▶ More planful, less spontaneous
- ▶ Have broad institutional buy-in, support for SM
- ▶ Control SM activities (content & staff) within own dept.
- ▶ Have enough expertise in-house & don't need to look for outside resources

1. Success

Other success factors

- ▶ Go beyond Facebook: incorporate Twitter, Flickr, YouTube, blogs, Ning
- ▶ Target multiple audiences
 - ▶ Including media, employers, guidance counselors, parents
- ▶ Multiple measures of success
- ▶ More likely to have policies

1. Success

Who tends to succeed with SM?

- ▶ Larger institutions (5K+ students)
- ▶ Marketing + Communications depts
- ▶ Those with more SM staff
- ▶ Slight skew toward central depts
- ▶ NOT driven by peer SM activities

1. Success

Barriers to success

- ▶ **Lack of staffing and expertise**
 - ▶ Site development
 - ▶ Content management
 - ▶ Ongoing implementation
- ▶ **Lack of institutional clarity**
- ▶ **Slow pace of change**
- ▶ **Lack of commitment; uncertainty about SM usefulness**

2. Management & Staffing

At most institutions, SM tends to be ...

- ▶ **Controlled by the unit, including the staff & resources assigned to social media**
- ▶ **Local & dispersed throughout institution rather than centralized & coordinated**
- ▶ **Led predominantly by in-house resources rather than freelancers or vendors**

2. Management & Staffing

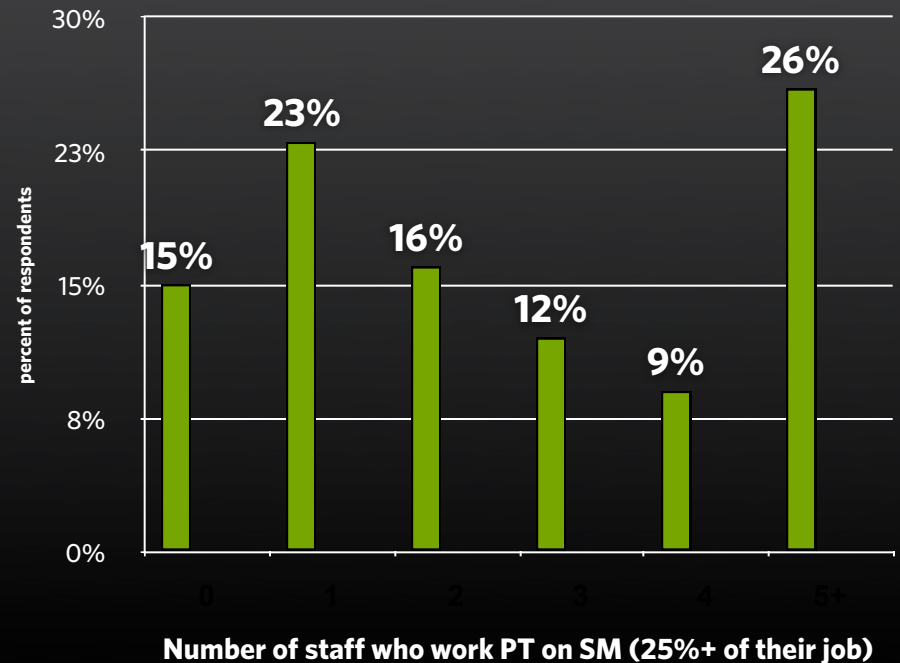
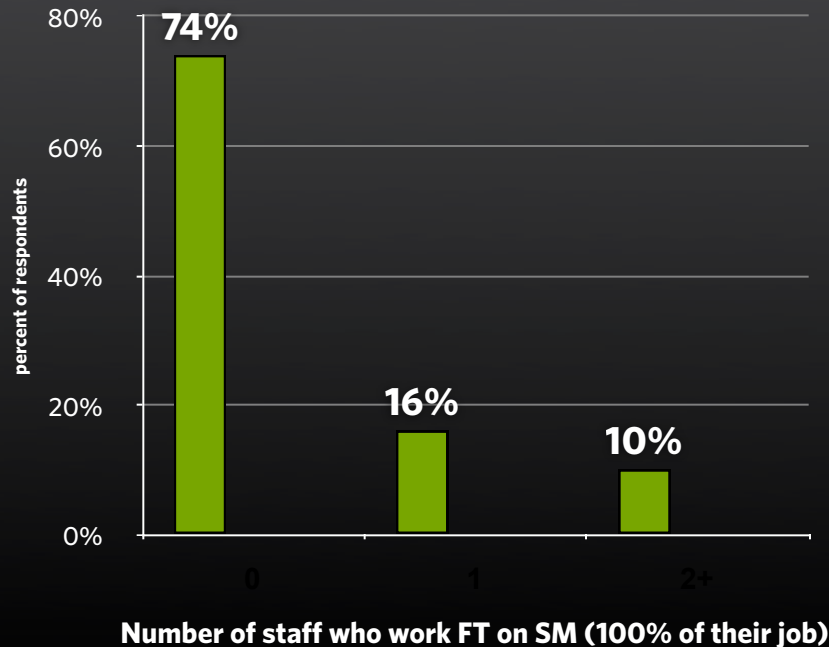
Other observations about staffing SM

- ▶ Institutions that are more successful with social media have more staff devoted to it
- ▶ 4-yr+ colleges more likely to have staff working on SM full-time at unit level
- ▶ At schools, SM more likely led by director or manager; at 4-yr+ colleges, someone junior
- ▶ At larger institutions, SM managed by staff who are more junior

2. Management & Staffing

How institutions staff social media

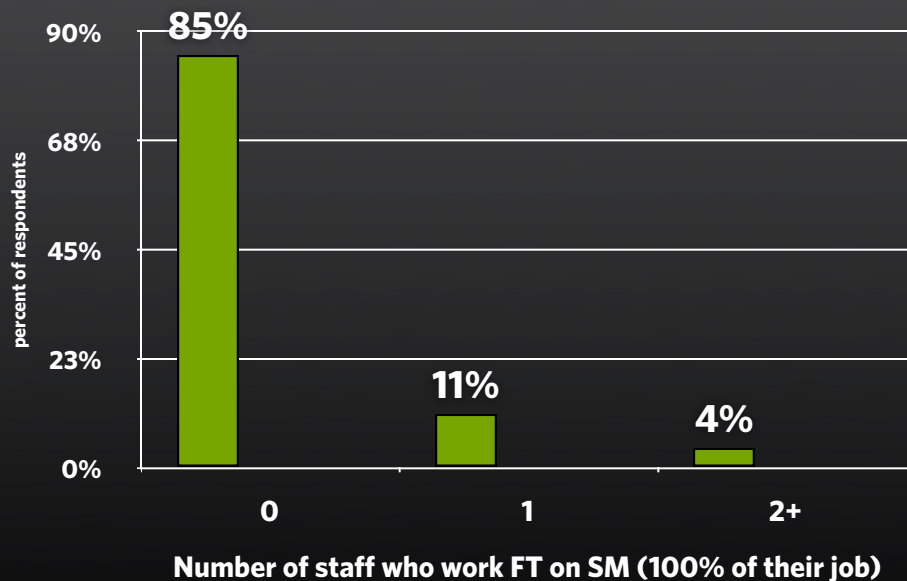
At the institutional level, one-quarter have someone working full-time, 100% dedicated to SM



2. Management & Staffing

Department-level Staffing

At the department level, 80% of departments have some part-time focus on SM



2. Management & Staffing

How Institutions organize for SM

- ▶ Distributed
- ▶ Centralized
- ▶ Coordinated

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2. Management & Staffing

Staffing levels and reports

▶ Level

- ▶ One-third are specialists/coordinators
- ▶ One-third are associate/assistant directors/mgrs
- ▶ One-quarter are directors/managers

▶ Who do they report to?

- ▶ Majority report to a manager/director
- ▶ 30% to someone above a manager/director
- ▶ 13% to someone below a manager/director

2. Management & Staffing

Distributed



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2. Management & Staffing

Centralized



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2. Management & Staffing Coordinated



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3. Policies & Guidelines

Growth & use of policies & guidelines

- ▶ Adoption of policies or guidelines for social media growing slowly
- ▶ Most institutions don't have guidelines or policies
 - ▶ If they do, branding or graphics guidelines are most common
 - ▶ Some have content management guidelines but few tackle privacy, ethical, or legal guidelines

3. Policies & Guidelines

What policies & guidelines address

POLICY AREA	NOT AT ALL	NOT MUCH	SOMEWHAT	QUITE A BIT	EXTENSIVELY	MEAN
branding & graphics	11%	12%	27%	33%	16%	3.3
content management & control	16%	20%	34%	24%	6%	2.8
privacy	18%	24%	32%	19%	8%	2.8
negative postings	20%	24%	33%	18%	5%	2.7
ethical issues	22%	27%	31%	15%	5%	2.6
legal issues	22%	28%	29%	16%	5%	2.5

3. Policies & Guidelines

Policies and guidelines

- ▶ **Creating, monitoring & enforcing policy is responsibility of Communications (55%) or Marketing (36%)**
- ▶ **40% of institution are seriously considering developing policies; 29% are unconcerned about them**

3. Policies & Guidelines

Resources & samples

- ▶ **University of Oregon:** mstnr.me/UofOSM
- ▶ **Ball State University:** mstnr.me/n7nJV4
- ▶ **Vanderbilt University:** mstnr.me/ohCuiD
- ▶ **DePaul University:** mstnr.me/DePaulSM

Implications/ Lessons Learned

Changes since 2010: Good news

- ▶ **Twitter use is up**
- ▶ **More believe that SM has value, is here to stay**
 - ▶ **But more also say others in their department aren't interested in SM**
- ▶ **More have IT & content mgmt resources they need**
- ▶ **More have policies on legal and privacy issues, negative postings**

Looking ahead

This year, we'll see institutions:

- ▶ Creating a comprehensive SM plan (51%)
- ▶ Expand SM program to new audiences (46%)
- ▶ Add new SM tools to current programs (44%)
- ▶ Develop formal policies (37%)

But we won't see:

- ▶ Getting help from prof. association (15%)
- ▶ Hiring staff (14%)
- ▶ Getting help from SM consultants (9%)
- ▶ Hiring a vendor for SM evaluation (4%)

Possible tensions or conflicts

- ▶ Most plan to expand SM but few will add resources
- ▶ Key barriers are lack of expertise & staffing: but few will hire staff or use consultants
- ▶ Low concern about privacy, ethical issues; yet the more involved you are, the more you encounter them
- ▶ Want resources, don't want to give up control
- ▶ Successful SM orgs are happy with how things are. Are they complacent?

Lessons learned: Deployment of SM

- ▶ Focus on one tool, get it right, move on.
 - ▶ “Figure out how to do one well, rather than 10 in a so-so manner.”
- ▶ Keep in mind your audience needs.
 - ▶ “The content and conversation must be relevant. In other words, your message will only be effective if the audience cares about the subject.”
 - ▶ “...make sure they’re participating in a service before you invest your time. Don’t listen to one or two people—there’s always a cool new platform to explore.”

Lessons learned: Targeting of SM

- ▶ Twitter helps to engage media

- ▶ "It has actually become more effective in some cases than formal press releases."

- ▶ Audiences are fickle.

- ▶ "Prospective students seem to want to participate after a decision is made ... i.e. admitted or deposited."
 - ▶ "... the opinions, feelings, and interests of your specific audience will wax and wane. What works today will probably not work tomorrow. So keep an eye on what people are responding to."

Lessons learned: Policies

- ▶ **Don't be afraid of negative comments!**
 - ▶ "It's OK to post a disclaimer that clarifies some content may be deleted. This spares you from having to keep profanity-laden posts or inappropriate content."
 - ▶ "Don't be afraid of negative comments about the institution. Faithful alumni will usually chime in...."
 - ▶ "We've had a few incidents that could have gone horribly wrong when students reacted to incidents on campus and became vocal on Facebook. By sticking with our guidelines we managed to avoid any major fallout from the situations."

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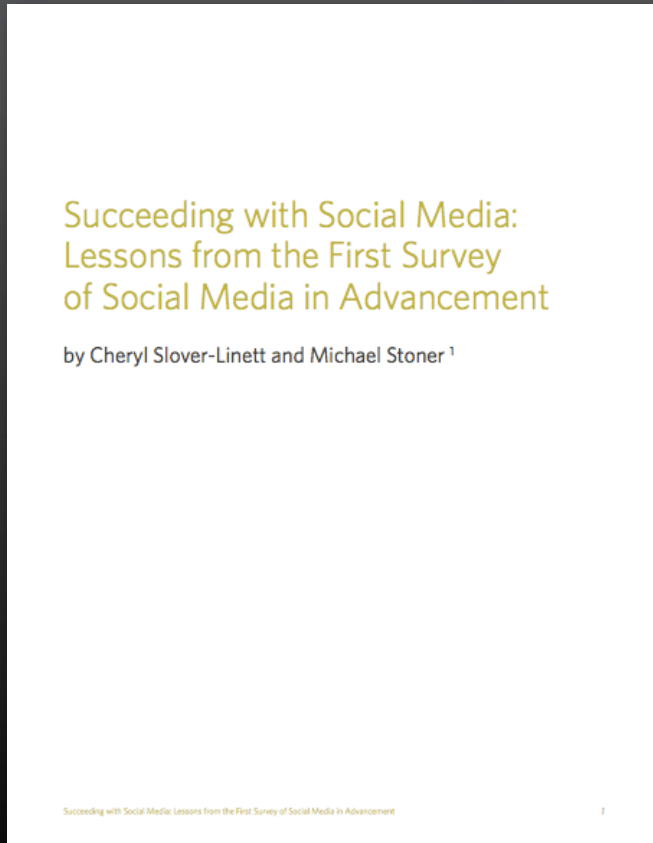
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