

We've all heard the numbers about the growing use of social media. Alumni are avidly posting on Facebook, reporters and other influencers are tweeting away, and students are fighting to become mayor of a campus or community hotspot on Foursquare. Most educational institutions have some sort of social media presence, but what are they trying to achieve with it? What does an effective social media program look like?

Earlier this year, CASE formed a social media task force to explore these questions and learn about social media engagement at member institutions. Led by Andrew Gossen, senior director for social media strategy at Cornell University in New York, and Charlie Melichar, associate vice chancellor for communications at Vanderbilt University in Tennessee, the task force began interviewing colleagues about social media activities. What was lacking was data.

"Social media is something that professionals in all disciplines are struggling with, making it a universal advancement issue," says Rae Goldsmith, CASE's vice president of advancement resources. "We needed a way to better benchmark where people are to help

us understand their needs and to help us determine what resources could be meaningful to them."

As a result, CASE, in partnership with mStoner and Slover Linett Strategies, in June launched a benchmarking survey on social media in advancement by e-mailing links to an online questionnaire to a random sample of 18,000 U.S. and international CASE members. Nearly 1,000 responded, providing a demographically representative cross section of CASE membership. The results have a margin of error of plus or minus 3 percentage points, which is comparable to reliable national research data.

SURVEY SAYS

This survey, the first in-depth look at how independent schools, colleges, and universities are using social media to engage with significant external audiences, offers some interesting takeaways.

Most institutions are using one or more social media tools, but Facebook rules. The social networking site born on a university campus reigns as the platform of choice, with 94 percent of institutions using it to engage with multiple audiences—the largest being

alumni—and 85 percent rating it as the tool that is most successful in meeting their goals. Two-thirds of institutions are using Twitter, while about 60 percent are on LinkedIn and YouTube. Approximately one-third maintain blogs, use Flickr, or have a vendor-created social community. Almost 60 percent of institutions have added social networking features to their own websites. Only 4 percent of respondents said they weren't using any social media—and most of these respondents represented development offices. After Facebook, respondents ranked their own websites with integrated social networking features as the most successful tool in meeting their goals (31 percent), edging out LinkedIn (27 percent), Twitter (25 percent), and YouTube (23 percent).

Alumni are the primary focus of institutions' social media efforts. Nearly all institutions (96 percent) are using social media to engage alumni. Next in line is strengthening the institution's image, with 92 percent using social media to create, sustain, and improve the brand; 80 percent are using these tools to increase awareness, advocacy, and rankings. Most marketing professionals are also using social media

PHOTOGRAPH © STOCKPHOTO.COM/DANIEL LAFLOIR

Results from CASE's inaugural survey
of social media in advancement

By CHERYL SLOVER-LINETT and MICHAEL STONER

Social media has been layered on to everything else. This isn't a budget issue. It's a management challenge.

to engage current students (84 percent), admitted students (84 percent), and prospective students (83 percent); 74 percent of development professionals reported using these tools in fundraising.

However, only 38 percent cited using social media for crisis and issues management as a goal—a surprisingly low ranking considering the ability of these tools, especially Facebook and Twitter, to provide real-time information. They're valuable components of any crisis communications and management plan, says consultant Andy Shaindlin of Alumni Futures.

Advancement offices' participation in social media is driven by their desire to communicate or compete. Nearly all respondents said their social media activities are motivated, at least in part, by demand from alumni or other constituents (86 percent) or competition from peer institutions (84 percent). While most respondents (71 percent) believe that social media have great potential for achieving important goals for their unit, less than half (46 percent) have the necessary institutional support and buy-in or the expertise (26 percent) to make their social media efforts successful.

Institutions are not making significant investments to support social media, either in staffing or budgetary support—only 33 percent of respondents were considering hiring additional staff members to work on social media. Meanwhile, 83 percent cite staffing for day-to-day content management as a barrier to successful social media use, and 78 percent say the same when it comes to site development.

“So you're not going to get any more people to do social media, but what you do have to do is unplug some people from doing some of what they're doing and switch their responsibilities,” says Shaindlin. “Social media has been layered on to everything else. This isn't a budget issue. It's a management challenge.”

FIGURING IT OUT

Management of social media is decentralized across institutions without much coordination, and respondents like it that way—53 percent handle social media activities within their unit with some input from other departments, while 24 percent do it without any input. Nineteen percent have another department that takes the lead.

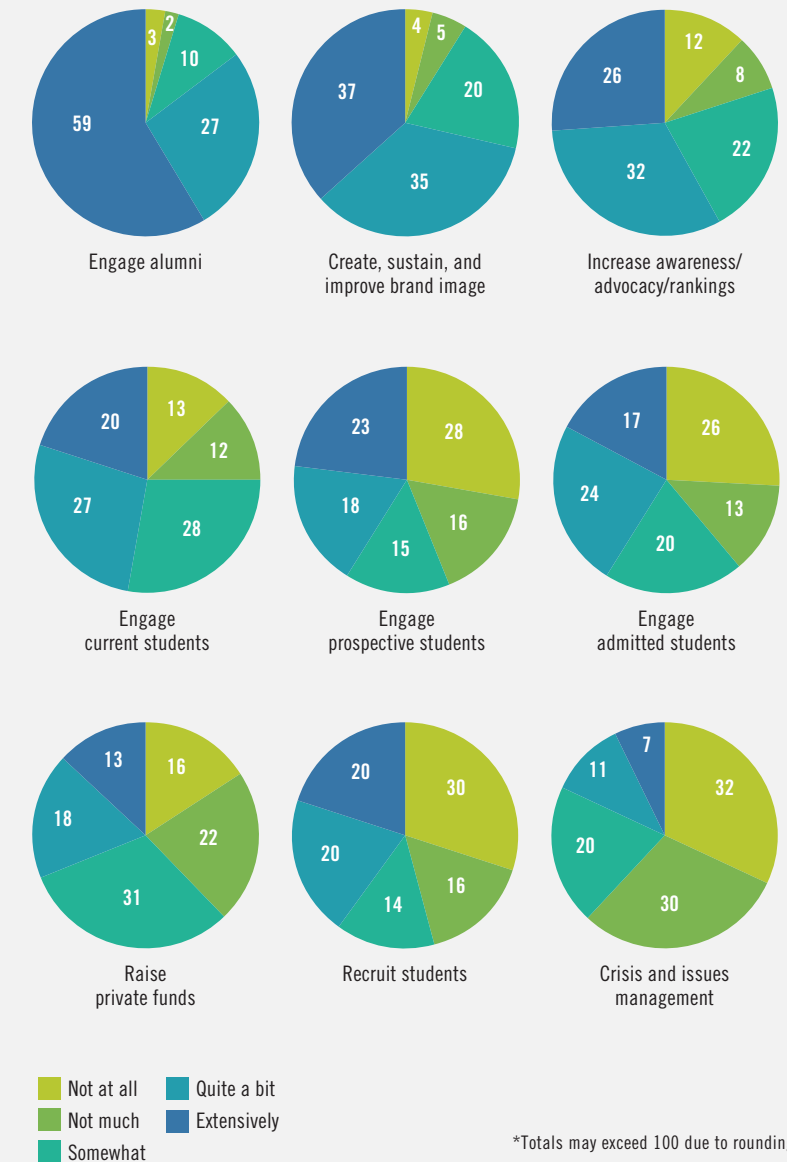
Management of social media is at the discretion of individual units, and many institutions are moving forward without the benefit of institutional policies or standards to turn to for guidance. About 60 percent have some kind of policy or guidelines regarding content or control, but the most common type covers branding and graphics. Just over 50 percent of respondents said they have some type of policy or guidelines to address privacy issues, but less than half have them for managing negative postings or addressing ethical and legal issues. While experts who speak or write about social media are invariably asked about how to respond to senior staff members' concerns about negative comments or blog postings, it was surprising to see that only half the respondents were concerned about the loss of control over content and the tone of postings by others.

Though survey respondents like the current Wild West approach to social media—an environment where there isn't much coordination, focus on policy, or standards—many recognize that they could benefit from more coordination and planning at the institutional level. In fact, only 35 percent said their development of social media is the result of planning, but 71 percent would like to see more of it in the coming year. Just 15 percent said their unit's social media are controlled by a coordinating committee or group, but 41 percent of all respondents would like to see more coordination in the near future—54 percent, however, like the status quo. Most don't see the need for a one-size-fits-all strategy, nor do they want to give up control over staffing or content.

Not surprisingly, the biggest challenges inhibiting institutions from doing more with social media are staffing, expertise, and funding. Privacy concerns, turf battles, and institutional red tape are low on the list of barriers partly, we suspect, because social media management is so decentralized, as were institutional websites at one point.

“I think my biggest surprise from the survey was the lack of concern about privacy,” says Cornell's Gossen, particularly in light of Facebook's botched attempt at changing its privacy settings and Google's management of users' personal information. “These

To what extent is each of the following goals for social media a goal for your unit? (by percent*)



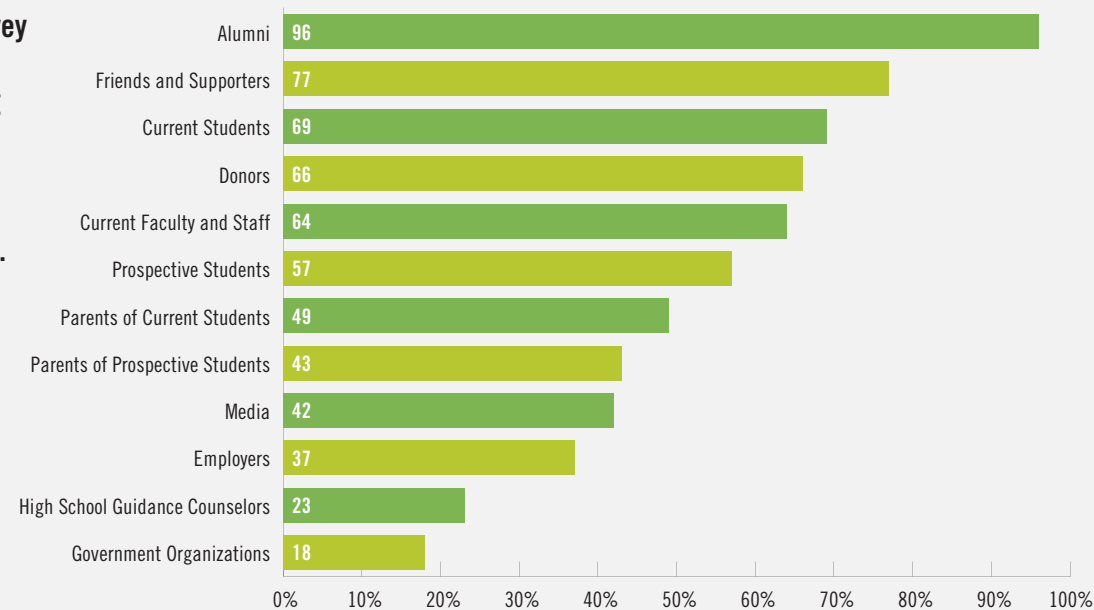
aren't esoteric issues—they're the best indicator that we should be worrying about this ourselves.”

UPPING THE ANTE

We're starting to see some coordinated yet decentralized approaches to managing social media, both within institutions and within units charged with broad communications with institutional audiences.

At Northfield Mount Hermon School, an independent secondary school in Massachusetts, about three

Percent of survey respondents communicating with these audiences using any type of social media.



dozen administrators, faculty members, and students contribute to social media platforms, including posting to blogs across the NMH domain, that are published and syndicated through NMHbook—the school’s social media aggregation site (www.nmhschool.org/nmhbook). Heather Sullivan, NMH’s director of communications and marketing, coordinates social media activities with her staff and other contributors across the various platforms. For example, a faculty member uploads images to the Flickr archive, which is managed by communications staff; an admissions staff member tweets and manages Facebook, while the alumni office is responsible for LinkedIn.

At the Emory University Alumni Association in Georgia, Stacey Gall, assistant director of technology and information management, works with Eric Rangus and Cassie Young to coordinate the organization’s social media efforts. They make sure their colleagues are well-versed in social media and able to participate where and when appropriate. They also communicate with co-workers and volunteers about planned events and get them on board to engage their constituencies. Yet social media are only part of their jobs: Rangus is the alumni association’s director of communications and Young oversees homecoming weekend, among other responsibilities.

“We’re trying to get to a point where all staff has their hands in social media,” Gall says. “We have around 70 Facebook pages and groups based mainly on events or city-specific networking. We rely on our staff, volunteers, and contacts in these locations to post and respond to comments.”

MEASURING UP

Most institutions (64 percent) consider their social media efforts to be moderately successful, another 20 percent say they are very successful, and 3 percent believe they have model programs. They say that having specific goals for activities; being more coordinated and doing more planning; controlling social media activities, including content and staff, within the department; and having enough in-house expertise are contributing factors to their success. A brave few (13 percent) don’t think their efforts have gone too well. Some of the issues this group cites as difficulties are lack of staffing, expertise, and funding; lack of institutional clarity about goals; a slow pace of change in a world that moves quickly; and a lack of commitment and uncertainty about social media’s usefulness.

How is success measured? The survey data provide limited insight into this question. Right now, institutions are primarily using metrics such as the number



To what degree is each issue a barrier to the successful use of social media in your unit?
(by percent*)



We reached our goals through the Great Depression, five wars, and 15 recessions.
But most importantly, so did our clients.

of fans, friends, and followers; analytics such as unique visitors and page views; and click-through rates.

“It’s an encouraging sign that people are beginning to measure, but the outcome measures that are used the most are the most basic,” says Gossen. “We need resources to help people conceptualize and implement more sophisticated measuring.”

While many institutions are using analytics to track their Web and social media data, Alumni

Social media initiatives can be more limited in scope yet still have significant reach.

Futures’ Shaindlin would like to see them look at the impact of these numbers rather than just the numbers themselves.

“For example, having 100 more people in the group has resulted in x percent increases in messages posted on message boards,” he says. “In other words, we should be looking at what happens as a result of the numbers, not focusing on those numbers themselves.”

Respondents also reported that they weren’t doing much surveying. Close to 30 percent of respondents were satisfied with their evaluation efforts, but 48 percent would like to see more quantitative analysis and 24 percent would like to see more qualitative reviews.

“I’m a research-oriented guy, and if we’re integrating social media into programs and not doing research, that’s a problem,” says Vanderbilt’s Melichar. “We need to be integrating more survey research into our social media programs so we can measure the impact we’re having and adjust our campaigns in response to what we learn.”

LEARNING AS YOU GO

It’s difficult right now to know exactly what success looks like, but those respondents who rate their social media activities as very successful may be underestimating what they could be achieving if they were to develop a broadly integrated, multichannel campaign. Today, social media success rarely involves focusing on just one social media platform or channel. Integrating several social media platforms with their institutional website is a path institutions are starting to take.

Many view Oregon State University’s award-winning “Powered by Orange” (poweredbyorange.com) campaign as leading the way. While OSU hasn’t yet been able to measure the campaign’s impact on the university’s brand, David Baker, director of Web communications, points to the fact that campus units have adopted its theme and imagery and used it for initiatives such as the alumni association’s Haunted by Orange Halloween homecoming event in 2009.

The launch-and-learn approach that OSU took with “Powered by Orange” underlines an important lesson for social media efforts: If you don’t try, you won’t succeed. But you don’t have to go big or go home either. Initiatives can be more limited in scope yet still have significant reach. The College of William & Mary’s mascot selection earlier this year is one such case. (The effort earned the college a 2010 CASE Circle of Excellence Award; see page 46.) Other than trying to involve as many people as possible in helping to choose a new mascot, Susan Evans, the college’s director of creative services, didn’t have specific goals in mind when the search began. Evans used a blog, Twitter, Facebook, YouTube, and Flickr to keep audiences informed from the search announcement up to the event revealing the new mascot’s identity—and earned significant media coverage in the process (www.wm.edu/about/mascot/media/index.php).

“Our main lesson was that the integration of these social media tools matters,” Evans explains. “We didn’t realize the power behind what we were doing was that we were using all of these channels together but in different ways. We did plan upfront to use all of these channels and had a strategy of how to use each of them, but all of them together gave us a cohesive presence.”

NEXT STEPS

Now that benchmarking information exists, we’re working on the 2011 follow-up to this survey. In the meantime, respondents are considering what’s next, such as creating comprehensive social media plans (81 percent), expanding current social media programs to new audiences (82 percent), adding new social media tools to current programs (77 percent), and developing formal policies (67 percent). However, in this time of tight budgets, few institutions have the resources to acquire what they need, including expertise.

“Organizational leaders have to understand how important social media is and determine how to incorporate it into the org chart,” says Shaindlin of Alumni Futures. “This isn’t really a new challenge. It occurs all the time. The world changes, and if you want to be in it, you have to change too.”

Now is the time to seek out other models and learn how social media can be integrated into existing initiatives and ongoing programs. Part of meeting the challenge is staying up-to-date on what other institutions are doing and what is possible in the world of social media. However, 60 percent of respondents said they weren’t aware of other organizations that were using social media successfully. And few institutions are reaching out to external sources, including CASE, to learn more about what might work.

“There shouldn’t be any doubt that social media is a strategic asset within institutional and communications programs that needs to be integrated into our work,” says Melichar. “We should be moving away

from knee-jerk, spontaneous solution building. We should take the time to step back and think about what we’re doing. People need to calm down. There’s too much [emphasis on] trying to ‘create buzz.’ People have enough buzz in their lives right now—we should be trying to add value to their lives, and that requires thought.”

Cheryl Slover-Linett is the founder and managing partner of Slover Linett Strategies, an audience research and planning firm based in Chicago. Michael Stoner is the president of mStoner, a Chicago-based communications and marketing consulting firm.

Share Your Stories

Let CURRENTS know about your institution’s social media triumphs and tribulations. Submit your stories to Senior Editor Theresa Walker at twalker@case.org.

Copyright ©2010 by the Council for Advancement and Support of Education; reprinted with permission from the November/December 2010 issue of CASE CURRENTS. All rights reserved.

experience
organic donor
network
growth.



Build stronger donor connections anywhere on the web with new Sage Fundraising Online.

Sage Fundraising Online makes it easy to expand your donor network. By working with your donors’ existing social media networks, it does more than generate donations—it spreads your message to your supporters’ peers, creating new donors organically. There’s no installation or administration from your end, and no need to learn complicated new technology. And on-demand reporting tools help you identify and encourage your strongest supporters.

Go to www.sagenonprofit.com/fundraisingonline or call 800-811-0961 to learn more about Sage Fundraising Online.



© 2010 Sage Software, Inc. All rights reserved. Sage, the Sage logo and Sage product and service names mentioned herein are registered trademarks or trademarks of Sage Software, Inc. or its affiliated entities.

- Financial Management
- Donor Management
- Constituent Relationship Management
- Fundraising