

# Social Media for Community and Public Foundations

Grant Managers Network  
Fifth Annual Meeting  
March 15<sup>th</sup>, 2010



# Our Topics

- Web 2.0 / current tools can enrich your organization's grant making process
  - At surprisingly little cost and effort.
- Should you implement them?
- Understanding of whether and how web 2.0 technologies might be appropriate
  - Let's put trendy tools in perspective
- Focus on social networking systems for grantmaking.
- “Best practices” in deploying social networking tools
- Other low-cost, free or otherwise easy-to-use technologies to benefit grantees and reduce workload.

# Agenda

- Introductions
- Obligatory Web2.0 Circumscription
- Concepts: “today tools” to Enrich Grantmaking
- Best Practices
  - In Communications
  - Deploying Social Networking Tools
  - In General
- Other Technologies
  - Benefit Grantees and Reduce Workload
  - Applications of SharePoint
- Questions and Comments

# Introductions – Lisa Rau, CEO

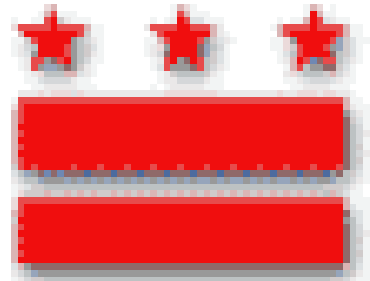
- ~20 years of experience in IT services industry
- Managed 100s of nonprofit technology consulting and software implementation projects; worked for dozens of Foundations
- Computer Scientist:
  - B.S., EECS, University of California, Berkeley
  - M.S., Computer Science, University of California, Berkeley
  - Ph.D., C.S. / Artificial Intelligence, University of Exeter, UK
- Visiting Faculty at the Univ. of PA's Computer and Information Sciences Dept (one year)
- Faculty, Center for Nonprofit Advancement's Learning and Leadership Institute
- Peer Reviewer; MD Nonprofits' Standards of Excellence Program
- Board Member, YWCA of the National Capital Area



center for nonprofit  
advancement

MARYLAND  
ASSOCIATION OF  
NONPROFIT  
ORGANIZATIONS

# Confluence Mission



LSDBE

N-TEN

To help our nonprofit clients  
achieve the greatest  
strategic value from their  
technology resources



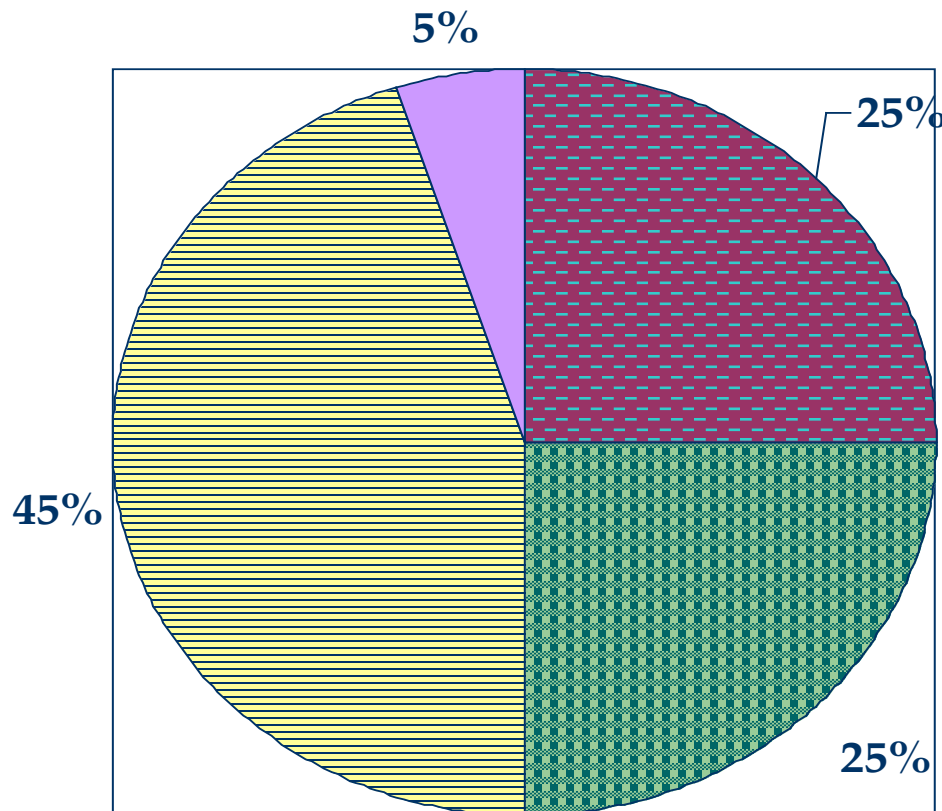
***The Alliance***  
RAISING THE BAR ON QUALITY



## Confluence Quick Facts

- Dedicated to Technology Support to Nonprofits
- Co-Founders: Lisa Rau (CEO) and Jeff Sullivan (President)
- Established March, 2001
- Offices in DC (1828 L Street, NW, Suite 725)
- Over 360 nonprofit and Foundation clients as of 1/10
- Over 30 full time staff and consultants
- Clients span fifteen states; most in DC area

# Services Breakdown



- Technology and Management Consulting
- Database, Website and Software Systems
- Infrastructure Support
- Training

# Specific to Grant Makers

- Requirements Facilitation and Documentation in support of Software Selection
  - Grant Making Database Systems
  - Grant Submission Systems
  - Grant / Proposal Tracking Systems
  - Contact Management Systems
- Extranets for Grantees
- Website Support / Integration
- Tech Support

# Obligatory Web 2.0 Circumscription

My Perspective

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# Obligatory Web 2.0 Circumscription

- “Social Networking”: We know; Facebook / MySpace / YouTube
- Common Theme: User generated content
- Includes mundane (Forward to a friend), meteoric (Twitter), obscure and only-for-techs
- Examples:
  - People who liked / bought this, also liked / bought this
  - Comments on stuff (Amazon) - Freecycle
  - Reviews (Yelp) - Wikipedia
  - Ratings (NetFlix) - Craigslist
  - Flickr; Snapfish - Netflix

# Some Relatively Common Capabilities

- **Digg:** Aggregated by user submissions across “the internet” with popularity determined by public votes
- **Delicious:** Social bookmarking service to tag, save, manage and share web pages
- **Technorati:** Search specifically within blogs - Indexes over 100 million blogs (as of 6/08)
- **Friendster:** Popular down under (90% users are in Asia); similar to Facebook
- **YouTube, Google Videos, Revver**
- **Ping.fm:** Update multiple networks at once
- **Ning:** Tool to create social networks

# More Social Networking Sites



# What Have we Wrought?

- “Think a T-Shirt Can’t Change Your Life? A Skeptic Thinks Again” (NY Times, 5/24/09)
  - Undeniably totemic power of the shirt
  - Instant Icon of Internet Culture
  - Amazon top selling apparel item
  - From selling 2-3 / day to 100 an hr
- Michael Jackson internet crash
- iPhone changes everything
- Viral = Exponential growth
- Internet + GPS
- Connect everyone and what happens?



# Why Are Social Networks Happening to Us?

- Seductive? Addictive? Shockingly powerful.
- Facebook Suggestion: Add your cousin
- “Two Mutual Friends”
- Linked in: How do you know so-and-so?
- Feeds the snoopy in us all
- Makes us feel “connection in an isolating age”
- “Emerging and Evolving at the Same Time”
- RSS: Stay up-to-date w/o visiting websites
- We really do live in interesting times!



# It's not just me: Top Visited Websites - Alexa

- 3. Facebook
- 4. YouTube
- 7. Blogger
- 11. Myspace
- 19. Wordpress
- The rest are search engines basically, or Microsoft sites

# Today Tools to Enrich Grant Making

Blogs

Twitter

Social Networks

Facebook

Photo Sharing

# How “today tools” can enrich Grantmaking - Blogs

- Senior Management’s expertise and perspective shared with community
  - IRS guidelines for complying with Pension Protection Act of 2006 (Revenue Procedure 2009-32)
    - Imposes new excise taxes on private foundations for making grants to certain types of supporting organizations
  - How economy has / will impact plans
  - Perspectives on philanthropy
  - Articles, studies, resources of interest
- Like “Letter to the Editor”
- Credit in the “transparency” column

# How “today tools” can enrich Grantmaking - What Use Twitter?

- One Big Status Update
- Imagine: What will people think when they get this as a text message on their phones?
- Announcement-like things
  - Grant cycle opening; Due Dates
  - Awards
  - The work of the grantees (“In the news”)
- Track subscription numbers but also look at “real” outcomes
- So little effort involved – why don’t you?

# Social Networks

- Social Networks need something in common
  - Geography; Interests
  - Common funder; Objective / Specific purpose
- Social Network for grantees – maybe in common giving focus area (say, environment)
  - Exchange successes and failures
  - Become aware of good practices
  - Make real-time course adjustments to programs
  - Perhaps – ideas for coordination / reduction in duplication of services
- Other Potential Social Networks? Involving Recipients / Beneficiaries? The Public?

# Best Practices – Communications Strategy

- Focus on messaging, not getting to target audience
  - Self-identification by joining specific networks
- Evolution: Press releases to Website to Social Networks
- Best Practices
  - Create an integrated communications strategy
  - Reduce effort by automatically blasting to all vectors?
  - Promote everywhere – on website, in email

# Example of Signature

Lisa,

I appreciate you checking in. We are still reviewing the proposals. We should have a decision by the end of this month.



INTERNATIONAL WOMEN'S  
MEDIA FOUNDATION

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Web Manager  
1625 K Street, NW.....  
Suite 1275.....  
Washington, D.C. 20006  
p:(202) 567-2606  
f: (202) 496-1977  
<http://www.iwmf.org>

Join our online network:



Use GoodSearch & GoodShop:

Every time you search or shop online, our  
cause earns money.



# Best Practices – Communications Strategy

- Establishing social networking presence requires cultivation
  - Answer posts, respond to questions and ask questions
  - Introduce new and useful material
- Healthy dialogues require:
  - A critical mass of engaged people
  - Not too stressing of time (i.e., too long)
  - Seeding is often recommended

# Tenets for promoting virtual dialogue

- The dialogue should take place “next to” where the subject is described
  - “comment on this article”
- Super-easy to participate
- Moderation:
  - Approved by a human it goes live
  - Poster pre-approved by a human and then posts away
  - Email copies of posts to be reviewed just-in-time

# Promoting Virtual Dialogue

- For some web content, allow readers to comment
- Create private opt-in email groups among known participants that share a bond
- Via the Facebook platform
- No mechanism to promote dialogue will be successful unless:
  - A significant percentage of targets are actively “on” the vector already and the content is compelling

## Facebook – Be a Cause

- The greatest value to using Facebook and / or Facebook Causes is for mission, not fundraising – online community!
  - Haiti exception
- Have process to ensure Guidestar profile is updated regularly
  - Required for "donate now" button on Guidestar to accept donations via Facebook Causes
- Allow fans to participate on Facebook page
  - Check page regularly for rogue comments
- Use Logo as picture

# Facebook – Be a Cause – Credit to DIOSA | Communications

- Put "http://" before all Web sites in "Updates"
- Ask pre-April 2009 fans to opt-in to receive "What's on your mind?" Status Updates
- For maximum participation, go to "Settings" under "Share" button:
  - View Settings:
    1. Default View for Wall :: Posts by Page and Fans
    2. Default Landing Tab for Everyone Else :: Wall
    3. Auto-Expand Comments :: Check
  - Fan Permissions - Check:
    - Fans can write on the wall, post photos, post videos, and post links

# Facebook – Be a Cause

- Add and use the "Links" App to get organization to show up in "News Feeds"
  - To have ability to post links when updating/sharing "What's on your mind?"
    - To web site, blog, Twitter profile, etc.
  - These links show up in News Feeds of fans
- Static Facebook Markup Language (FBML)
  - Add boxes to page
    - Include text, links and images
    - Need basic working knowledge of HTML
  - Add "Donate Now" button to Facebook Page
  - Updates are important for fundraising

# Facebook – Be a Cause

- “Notes App”:
  - Run a blog on Facebook Page
  - Notes are listed chronologically; fans can comments and give thumbs up
  - Use "Notes" to announce "Nonprofit of the Month" on the Nonprofit Organizations Facebook Page and feature Notes as a Tab
  - Tabs can be dragged and dropped
- Social RSS App:
  - Use RSS to post blog articles on Facebook Page
  - Posts to wall and friends/fans home pages
  - Feature as a Tab, under Boxes, or on home page

# Facebook – Be a Cause

- Using "Static FBML" App
- Add Web 2.0 Icons
  - Login to nonprofit account at [Change.org](http://Change.org)
    - Admin Dashboard > Get HTML for Web 2.0 Icons.
    - Insert links to profiles on Twitter, MySpace, YouTube, etc.
    - Copy code that [Change.org](http://Change.org) automatically generates
  - Add a new box and paste Web 2.0 icons code
    - Web 2.0 icons box show up under "Boxes" Tab
    - "Move to Wall Tab" to show up on home page

# Facebook – Be a Cause

- Select a vanity URL like [www.facebook.com/yourdomain](http://www.facebook.com/yourdomain)
  - New in June 2009; Act quickly!
- Add Fan Box Widget to website/blog
  - Login as Admin; under logo
  - Grab code for widget
  - Displays status updates, thumbnails of fans, Fan!" button
  - Children's Defense Fund example of widget

- Sierra Club Promotion:



Children's Defense Fund on Facebook

[Become a Fan](#)

**Children's Defense Fund**

**See Marian Wright Edelman and the Dalai Lama This October!**

The Children's Defense Fund is pleased to support Mind and Life Institute's dialogue on Educating World Citizens for the 21st Century:

Educat... [Read More](#) v

3 minutes ago

**Children's Defense Fund** "Expanding health insurance coverage to all children in America is just smart economics."

**REAL**

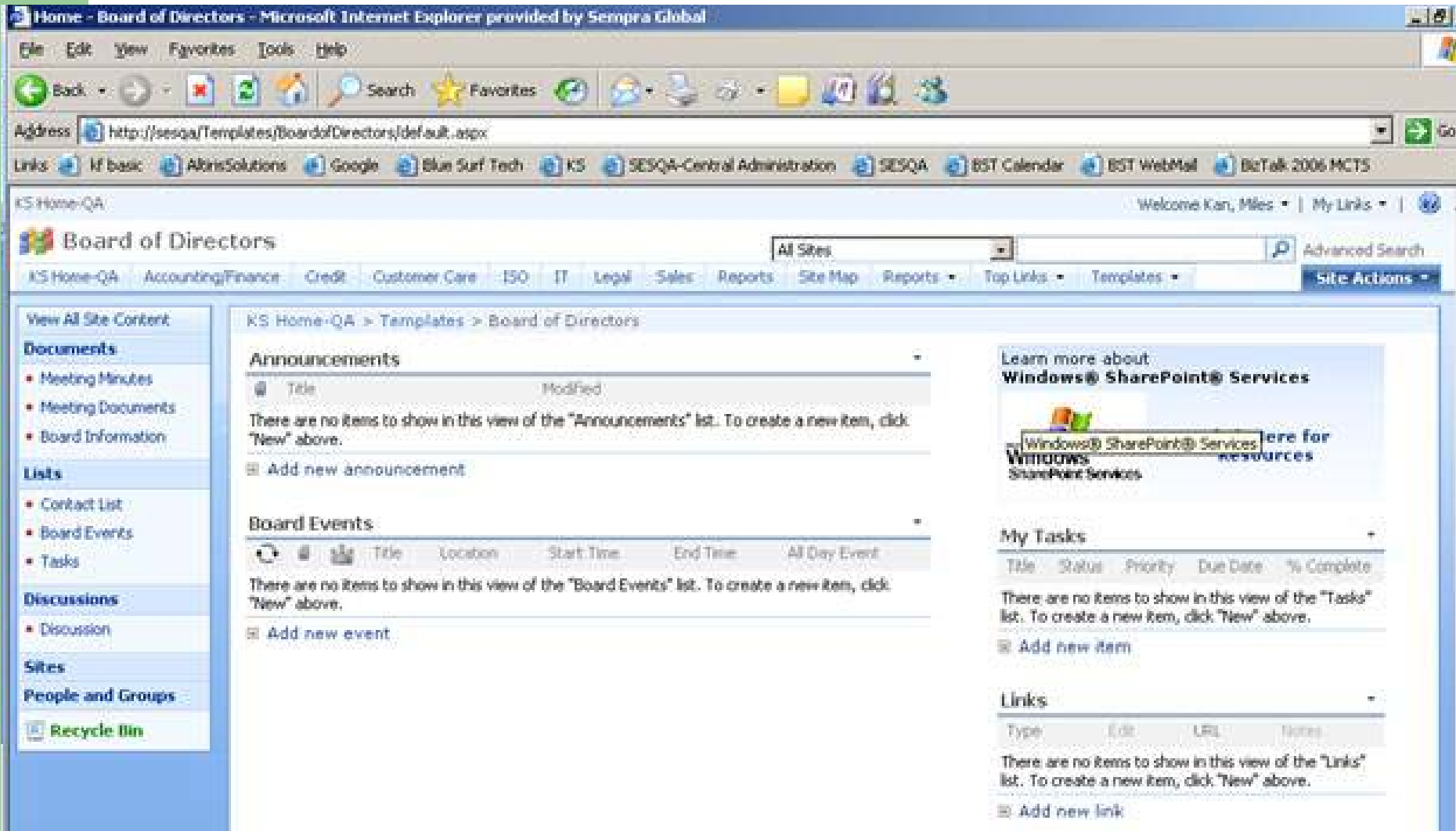
## Facebook – Be a Cause

- Use the "Favorites" function to build partnerships on Facebook
  - Link under logo "Add to my Page's Favorites"
  - "Favorite" your grantees
  - Post a comment on their wall letting them know that you made them a "Favorite"
- Have > one admin for page – just in case
- There is professional training on using Facebook!
- DIOSA's Webinar on "How Nonprofit Orgs can Use Facebook and YouTube"

# For Blogs, Facebook, Quasi-Personal Mediums

- Keep it clear
  - The personal and the professional
    - The grantee who reads the grant manager's blog and/or Facebook to ferret out likes / dislikes
    - The grants manager who checks up on the prospective grantee
- Keep it professional
  - Applicants, other foundations, knowledge experts, panels

# Other Technologies - Board Communication



The screenshot shows a Microsoft Internet Explorer browser window with the following details:

- Address Bar:** http://sesqa/Templates/BoardofDirectors/default.aspx
- Navigation:** Back, Forward, Home, Search, Favorites, and other standard browser icons.
- Page Title:** Home - Board of Directors - Microsoft Internet Explorer provided by Sempra Global
- Site Navigation:** KS Home-QA, Accounting/Finance, Credit, Customer Care, ISO, IT, Legal, Sales, Reports, Site Map, Reports, Top Links, Templates, and Site Actions.
- Left Sidebar:**
  - View All Site Content**
  - Documents:** Meeting Minutes, Meeting Documents, Board Information
  - Lists:** Contact List, Board Events, Tasks
  - Discussions:** Discussion
  - Sites**
  - People and Groups**
  - Recycle Bin**
- Main Content Area:**
  - Announcements:** A table with columns 'Title' and 'Modified'. Below the table, it states: "There are no items to show in this view of the 'Announcements' list. To create a new item, click 'New' above." Below this is a link: "Add new announcement".
  - Board Events:** A table with columns: Title, Location, Start Time, End Time, All Day Event. Below the table, it states: "There are no items to show in this view of the 'Board Events' list. To create a new item, click 'New' above." Below this is a link: "Add new event".
- Right Sidebar:**
  - Learn more about Windows® SharePoint® Services:** Includes a logo and the text "here for resources".
  - My Tasks:** A table with columns: Title, Status, Priority, Due Date, % Complete. Below the table, it states: "There are no items to show in this view of the 'Tasks' list. To create a new item, click 'New' above." Below this is a link: "Add new item".
  - Links:** A table with columns: Type, Edit, URL, Notes. Below the table, it states: "There are no items to show in this view of the 'Links' list. To create a new item, click 'New' above." Below this is a link: "Add new link".

# SharePoint

- \$20 / month, for shared, hosted Microsoft SharePoint web site for up to 50 users
- An integrative technology
- Integrated Intranet / Extranet (log in to a website)
  - Discussions
  - Documents
  - Contact Information
  - Calendars
  - Tabs – one for each type of grant
  - Comments
  - Links
  - Polls / Surveys
  - Announcements

# Other Technologies and Resources

- Other Technologies
  - Photos and Video
    - So compelling; so selling
- Other Resources
  - <http://www.digitalbuzzblog.com/the-top-10-social-media-presentations-online/>
- Your Grantees: Techsoup / Stock

# Paperless Grant Applications / Greening







- Quasi-custom web-based grants submission and management infrastructure
  - \$20K - \$75K; Hosting \$1,000 / month
- At a minimum – make grant applications online forms!
- Greening

# Paperless Grant Applications / Greening

- Streamlining Business Processes
- Make grantees type in data – solicited or public
- Pre-qualification questions
  - Prevent submission of out-of-scope requests
- Analyze across submissions not just awards
- Workflow-enabled – internal and external (auto-reminders of deadlines)
- Reduce status calls – self service
- Online reporting
- Automatic display of grants approved onto website (how cool is that?)

# ASPCA

- Twitter and Facebook links on website (footer)

	Name: <b>ASPCA</b> Type: Non-Profit Fans: 170,338 fans	<a href="#">Become a Fan</a>
	Name: <b>ASPCA</b> Type: Non-Profit Fans: 2,023 fans	<a href="#">Become a Fan</a>
	Name: <b>ASPCA</b> Type: Pets Fans: 54 fans	<a href="#">Become a Fan</a>
	Name: <b>ASPCA CAUSE</b> Type: Non-Profit Fans: 68 fans	<a href="#">Become a Fan</a>
	Name: <b>ASPCA - animal saviors</b> Type: Pets Fans: 7 fans	<a href="#">Become a Fan</a>
	Name: <b>Bounce® Partners with Petside.com and ASPCA®</b> Type: Consumer Product Fans: 88 fans	<a href="#">Become a Fan</a>

**Now it's Your Time for Questions**

*Ask Away!*



# Contact Me!

- I would love to hear from you:
  - Lisa Rau
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  - [lrau@confluencecorp.com](mailto:lrau@confluencecorp.com)
  - @lisa\_rau
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