



SOCIAL MEDIA: GETTING RESULTS FOR PLANNED GIFTS

PG CALC WEBINAR

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Over two thirds of all adults who use the internet in America use Facebook and, as of December 31, 2012, Facebook had over 1.06 billion monthly users.

These statistics point to the fact that social media, and Facebook in particular, have moved into the mainstream. Our prospects and donors are spending their time using social media, so it behooves gift planners to understand the medium and to figure out how to employ social media as a channel for communication.

This essay will review which social media sites are currently the most popular, with a focus on Facebook. Given Facebook’s dominance, we will review the advantages and disadvantages of setting up a gift planning specific Facebook page, some of the different types of content that you can post, and creative and effective ways to use Facebook ads. We will conclude with an overview of a multi-channel communications project that we undertook last year at Tufts University. This project allowed us to get a sense of the strengths and weaknesses of marketing through a traditional print postcard, a mass e-mail, and a Facebook ad.

Social Media Demographics

The Pew Research Center released a study on Social Media Demographics in February of 2013. This study demonstrated Facebook’s dominance in the social media landscape.

The Landscape of Social Media Users		
% of internet users who....		The service is especially appealing to ...
Use Any Social Networking Site	67%	Adults ages 18-29, women
Use Facebook	67%	Women, adults ages 18-29
Use Twitter	16%	Adults ages 18-29, African-Americans, urban residents
Use Pinterest	15%	Women, adults under 50, whites, those with some college education
Use Instagram	13%	Adults ages 18-29, African-Americans, Latinos, women, urban residents
Use Tumblr	6%	Adults ages 18-29
<p>Source: Pew Research Center’s Internet & American Life Project Post-Election Survey, November 14 – December 09, 2012. N=1,802 internet users. Interviews were conducted in English and Spanish and on landline and cell phones. Margin of error is +/- 2.6 percentage points for results based on internet users. Facebook figures are based on Pew Research Center’s Internet & American Life Project Omnibus Survey, December 13-16, 2012. Margin of error for Facebook data is +/- 2.9 percentage points for results based on internet users (n=860).</p>		

For those unfamiliar with these sites, or if you are part of the one-third of American internet users who do not use Facebook, let me briefly explain their basic characteristics.

Facebook

Facebook allows users to link to other “friends” and to “like” businesses, brands, charities, TV shows, etc. Each user can set their own privacy settings so their Facebook page, posts, and other interactions can be kept more or less private. I have my privacy settings set so that only my Facebook friends can see my posts and comments, for example. If you set up a Facebook “page” for yourself, your charity, or your business, then your posts may show up in your Facebook fans’ “news feeds.”

Twitter

Posts to Twitter are called “tweets” and it is important to note that all tweets are public. Tweets are limited to 140 characters. Each Twitter user can “follow” other users and be “followed.” While you are “friends” with people on Facebook, it is normal to follow people you don’t know on Twitter. For example, you can follow your favorite celebrity, author, or politician and get a sense of where they are in the world, and what interests them, on any given day.

You can also search by topic on Twitter using the hashtag (#) symbol. For example, if you want to see what people are saying about gift planning, or to find people who regularly post on the subject, search using #plannedgiving or #giftplanning to find relevant tweets.

Given the public nature of tweets, and the fact that you can follow anyone, Twitter tends to be more professional while Facebook tends to be more personal. For example, you can build a community of other gift planning professionals on Twitter and share ideas, best practices and articles with them.

The ephemeral and time-based nature of Twitter also makes it ideal for tracking and commenting on events while they happen. For example, here in Boston when the police were chasing the Boston Marathon bombers through the suburb of Watertown, residents tweeted about what they saw from their living room windows, which gave people a bird’s eye view of what was going on.

Pinterest

Pinterest is an online scrapbooking tool. It is similar to Twitter in that you can follow (or be followed) by people whom you don’t know, but what you see when you follow people are the images they post. Users generally sort their images into topic areas, such as “design,” “food,” or “gardening” to make it easier to find images that specifically interest you.

Instagram

Instagram is a photo sharing tool that is specifically for Apple users (iPhone, iPad, etc.). It allows users to apply funky filters to alter the appearance of their photos. For example, you can make them look old-fashioned. Users can follow other people to see their photos.

Tumblr

Tumblr is a micro-blogging site where users can follow and be followed.

Facebook is Dominant

For the purposes of marketing gift planning, Facebook is the only social media site of significant relevance today. The audience for all social media sites skews towards people in their twenties but, because it has such a large audience, Facebook is also seen by a significant number of older adults in the U.S.

According to the Pew Research Center, 57% of adults between the ages of 50-64 (who use the internet in the U.S.) are on Facebook, and 35% of internet users over the age of 65 are on Facebook. Usage statistics are on the rise. The Pew Research Center goes on to say that:

Social networking site users are accessing these sites more frequently than in the past. In a separate survey conducted in November 2012, some 41% of social networking site users said that they access these sites several times a day — a statistically significant increase from the 33% of users who said that they accessed social networking sites with that level of frequency in August 2011. (Pew Research Center, February 13, 2013)

Here are the complete results of the most recent Pew Research Center study on Facebook usage.

<u>Facebook</u> <i>% of internet users who use Facebook</i>		
Use Facebook		
All internet users (n=860)		67%
a	Men (n=418)	62%
b	Women (n=442)	72%
Age		
a	18-29 (n=164)	86%
b	30-49 (n=254)	73%
c	50-64 (n=231)	57%
d	65+ (n=183)	35%
Education attainment		
a	Less than high school/high school grad (n=261)	60%
b	Some College (n=250)	73%
c	College + (n=345)	68%
Household income		
a	Less than \$30,000/yr (n=223)	68%
b	\$30,000-\$49,999 (n=152)	62%

c	\$50,000-\$74,999 (n=127)	69%
d	\$75,000+ (n=248)	73%
Urbanity		
a	Urban (n=261)	72%
b	Suburban (n=442)	65%
c	Rural (n=157)	63%
<p>Source: Pew Research Center’s Internet & American Life Project Omnibus Survey, December 13-16, 2012. N=860 internet users. Interviews were conducted on landline and cell phones. The margin of error is +/- 2.9 percentage points for results based on internet users.</p> <p>Note: Percentages marked with a superscript letter (e.g., a) indicate a statistically significant difference between that row and the row designated by that superscript letter, among categories of each demographic characteristic (e.g. age).</p>		

This study shows that Facebook usage crosses all demographics. Approximately two-thirds of American adults, regardless of gender, educational background, household income, and urbanity, use Facebook if they use the internet.

Facebook Pages

As you consider how to use Facebook to promote gift planning, one of the first questions you’ll need to answer is whether you want to start your own gift planning Facebook page, or whether you will post gift planning messages on your charity’s main Facebook page. A few years ago, starting your own gift planning page was simple, but Facebook changes quickly and it is a challenge to keep pace.

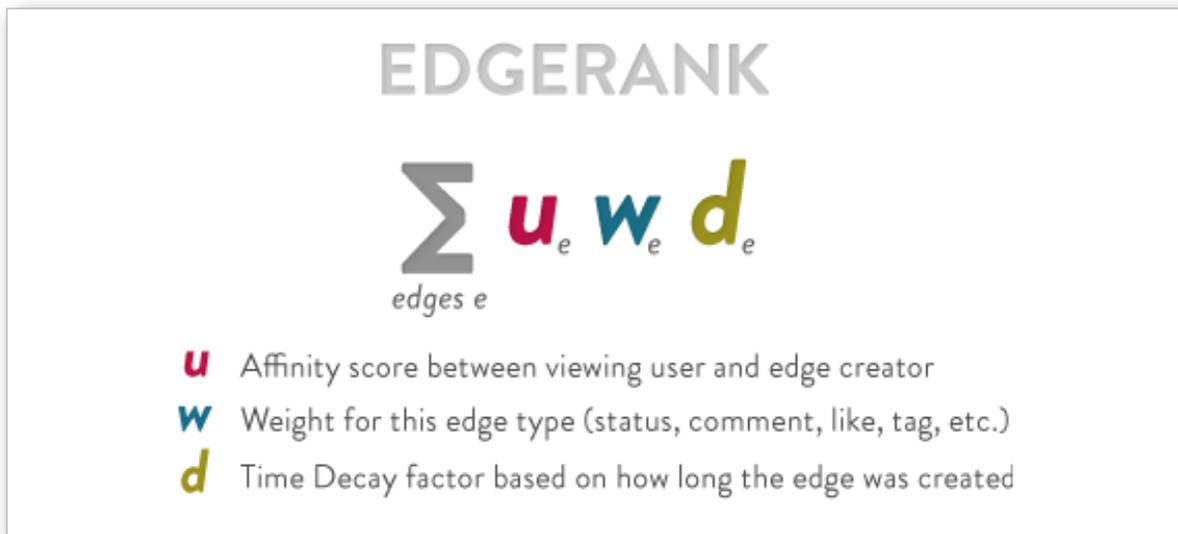
Even though it can be a lot of work, there are advantages to starting and maintaining your own gift planning page. We started ours at Tufts University in 2010 (www.facebook.com/charlestuftssociety). The page is branded with the name of our legacy society (Charles Tufts Society) and its mission is to share “news about bequests, gift planning, and tax efficient ways to support Tufts.”

One of the primary advantages of managing your own, gift planning specific Facebook page is that your donors can self-identify as being interested in gift planning by liking the page. In addition, you can create a community, and get to know that community better, by interacting with the people who like your Facebook page. You probably won’t want to discuss any given individual’s gift plans on Facebook, but you can ask people to tell you why they appreciate your organization and what it has meant to them in their lives.

Facebook is very useful for sharing timely information. For example, you can let fans of your page know about changes in charitable gift annuity rates or in the status of the IRA charitable rollover as soon as the news is released.

The major downside to creating and managing your own Facebook page is that you need to understand Facebook’s algorithm, Edgerank. One recent trend in Facebook usage is for people to spend more time reading their news feed than on individual or brand profile pages. The website comScore reports that “40% of users’ time is spent in their news feed and only 12% on profile and brand pages.” This means that you need to make sure that your posts appear in your fans’ news feeds in order to have any confidence that they will be seen.

When you login to Facebook and look at your news feed, you are not seeing all the posts that are generated by your friends, and the businesses, groups and charities that you like. Instead, Facebook curates your news feed using their proprietary algorithm called Edgerank. The algorithm gives prominence to posts from people or organizations that you frequently interact with (by “liking” their posts or leaving a comment, for example). It also prioritizes generally popular posts in terms of how much overall interaction any given post has received (i.e., does it have a lot of “likes.”) Edgerank penalizes posts that have received negative feedback, making them unlikely to appear in your news feed.



(Graphic from www.jonloomer.com)

There is a lot of online discussion regarding what “type” of post Edgerank favors most. Some people say that it prefers images and short text posts and de-emphasizes posts with links to articles. I believe that, given it is an algorithm, Edgerank simply responds to what your fans like and, therefore, the task of a good Facebook page administrator is to experiment to figure out what provokes your fans to “like,” comment, or share your posts. Are people more likely to respond at a particular time of day or on a specific day of the week? Do they, in fact, like photos more than videos, for example.

Given Edgerank’s exacting standards, you may want to post gift planning messages on your charity’s main Facebook page, as opposed to starting and maintaining your own page. Posting to your charity’s main page means that users who already have a high affinity with that page will be more likely to see your posts.

Types of Posts

Regardless of whether you manage your own page, or post messages to your charity's main page, here are some suggestions for messages you can post that are relevant to gift planning.

- Posts about different types of planned gifts and/or making gifts tax-efficiently. Such posts are usually links to mainstream articles and the goal is to teach people about gift planning and to establish credibility by showing people that the Wall Street Journal, New York Times, and USA Today, for example, discuss these types of gifts in their publications. One way to find these articles is to set a Google News Alerts for words such as "charitable bequest", "charitable gift annuity", and "charitable remainder unitrust."
- The timely nature of Facebook's news feed allows you to announce "breaking gift planning news" on Facebook, such as ACGA rate changes, the status of the IRA charitable rollover, and changes in estate tax legislation.
- Posts about the impact of gifts that your charity has received from trusts, estates, and other types of planned gifts. Such posts demonstrate that your charity is worthy of support by letting people know about the bequests and other estate gifts your charity has received. You can post about a variety of gift sizes and purposes in order to demonstrate that planned gifts come in all shapes and sizes.
- Posts about your charity's history. In the case of Tufts, the goal is to connect alumni to the Tufts they knew when they were a student, and to pull at their heartstrings. Such posts are also a good way to demonstrate that your charity has received bequests throughout its history. Or perhaps, as is the case with Tufts, it was founded by a bequest.
- You can also steward members of your legacy society, or other donors, by featuring them on your Facebook page.

The following are some examples of the types of posts referenced above:

facebook Rebecca Scott Home

Charles Tufts Society Timeline Founded Highlights Liked Admin Panel

1852

Founded in 1852
In Medford, Massachusetts.

Tufts University was founded in 1852 when Charles Tufts' gave 20 acres of land on Walnut Hill in Medford, Massachusetts on the condition that it be used to build a college. Charles Tufts bequeathed an additional 80 acres of land through his will.



Like · Comment

Now
February
2012
2011
2010
1927
1910
Founded

 **Charles Tufts Society** shared a link.
March 9

This fund, created by Charles Tufts Society member Dr. Roderick Lewin, D57, allows residents in oral and maxillofacial surgery from Tufts Dental School to travel around the world to perform surgeries to treat cleft lip or palate in children. (c.c. Tufts University School of Dental Medicine - Alumni Relations)



Giving to Tufts - Profiles in Giving
giving.tufts.edu

The first thing a visitor notices in the waiting room of the SDME Hospital Craniofacial Unit in Dharwad, India, are all the children waiting for treatment who were born with cleft lip or palate. Their deformities



Charles Tufts Society

December 22, 2011

Tufts University was honored to receive a gift from the Estate of Brent Jackson, A64, earlier this year. Mr. Jackson had a lengthy career at the Museum of Science and attributed his career choice to his time at Tufts, where he majored in biology. He loved Tufts and, in addition to a generous bequest, Tufts received Brent's collection of Jumbo memorabilia and mementos from his time on campus.



Like · Comment · Share

5 2 1

5 people like this.



Ann Romer Wonderful! Hope to see his collection one day. I can give you my Kippie drinking mug and my 4 small diaries. :-)

December 22, 2011 at 10:43am · Like



Jill Hecht Maxwell I knew Brent Jackson at the Museum of Science but I did not know that he went to Tufts--nor that he had passed away!!! How lovely that he saved all these Tufts things and shared them with the rest of us.

February 10 at 2:13pm · Unlike · 1

 **Charles Tufts Society** shared a link.
November 2, 2011

Congratulations to Charles Tufts Society member Mike Savicki, A90, on receiving the Distinguished Achievement Award from Tufts' Athletics Department this year! Click on the link to read his story and watch the moving video by Charles Tufts Society member, Steve Eliopoulos of Gravity Boston.

Unlimited Potential
now.tufts.edu

When Mike Savicki, A90, one of the top wheelchair marathoners in the country, received the 2011 Distinguished Achievement Award from the Tufts Athletics Department on Oct. 15, it was the latest in a long line of accolades for the star athlete.

Like · Comment · Share  2

 **Charles Tufts Society**
November 8, 2011

Nov 8, 2011 11:02am
Check out this video of a sea turtle's CT Scan at the Cummings School of Veterinary Medicine at Tufts. The CT Scan was funded in part by a gift from the estate of Zelda Cushner.



Like · Comment · Share  4



Charles Tufts Society
March 10

In honor of International Women's Day, which was on March 8, we recognize Cornelia Maria Jackson (1822-1893) of Wrentham, Massachusetts whose bequest established the "The Cornelia M. Jackson College for Women" and the "Cornelia M. Jackson Professorship of Political Science." (c.c. ATA - Association of Tufts Alumnae)



Like · Comment · Share

11 people like this.



Charles Tufts Society The photo is three Jackson tennis players, 1922 (Permanent URL: <http://hdl.handle.net/10427/3285>), image from the Melville Munro Collection, Digital Collections and Archives, Tufts University.

March 10 at 7:15pm · Like



Ann Romer Still proud to be a Jackson College grad of Tufts University! Class of 1960.

March 11 at 2:12pm · Like

 **Charles Tufts Society** shared a link.
November 4, 2011

This can be a particularly tax efficient gift for people who are at least 70 1/2 years old.



The Upside of Gifts Made Directly From I.R.A.'s
www.nytimes.com

The donations can be valuable to some taxpayers because the required minimum distribution raises their income, which limits some itemized deductions.

Like · Comment · Share  3

 **Charles Tufts Society** shared a link.
January 6

Glad to see charitable giving made the list, along with a another plug for charitable gift annuities.



7 resolutions for retirees in 2012
www.huffingtonpost.com

Retirees may be past the days of resolving to work out more or buy fewer \$4 coffees. Yet when it comes to money in particular, resolutions may be even more important for those living on fixed

Like · Comment · Share  3  1

 3 people like this.

 **Margot D. Lenhart** Good post. Thanks!
January 6 at 4:18pm · Like

 **Charles Tufts Society** shared a link.
February 17 

Physics and Astronomy majors take note... member of the [Tufts Alumni Association](#) and Charles Tufts Society, Steve Eliopoulos, A89 and his wife, Joyce, have established an endowed fund to support student research in Physics and Astronomy via Tufts' Summer Scholars program.

 **Giving to Tufts - Profiles in Giving**
giving.tufts.edu

At this exact moment a subatomic particle called a muon is passing through your body by the tens of thousands and they've all died well before you could finish reading this sentence. The measurement of

Like · Comment · Share  1

 7 people like this.

 **Margot D. Lenhart** Kudos to Steve & Joyce!
February 17 at 9:15pm · [Like](#)

 **Anthony Monaco** Many thanks, Steve and Joyce!
February 18 at 10:19am · [Like](#)

 **Donald R. Megerle** Steve and Joyce are true Jumbos!!!!!!
Hugs!!!!
February 18 at 10:27am · [Like](#)

 **Eric Johnson** Joyce and Steve are the best. Thanks again!!!
February 18 at 10:54am · [Like](#)

Note: Anthony Monaco is Tufts University's President and Eric Johnson is the Vice President for Advancement. It was great stewardship for these two university leaders to thank the donors in this public forum.

You can also use your Facebook stories to bring a fresh stream of news stories to your gift planning website. See below where the Facebook news feed appears on the gift planning website (www.tufts.edu/giftplanning).

The screenshot displays the gift planning website's interface. On the left is a vertical navigation menu with categories like 'Faculty and Staff Giving', 'Gift Planning', 'Bequests', and 'Charitable Gift Annuities'. The main content area features a video player with a silhouette of a person in a hat, a play button, a progress bar, and a 'vimeo' logo. Below the video is a heading 'MAKE YOUR DREAM COME TRUE FOR THE UNIVERSITY YOU LOVE' and a paragraph explaining the gift planning office's services. To the right of the video is a promotional box for 'The CHARLES TUFTS Society' with a 'Find us on Facebook' button. Below the video player are two smaller promotional cards: 'Look Ahead, Give Back' featuring a woman and 'Impact of Bequests' featuring a woman and a child. On the far right is a Facebook social plugin showing the 'Charles Tufts Society' page with a 'Like' button and a news feed item about charitable bequests.

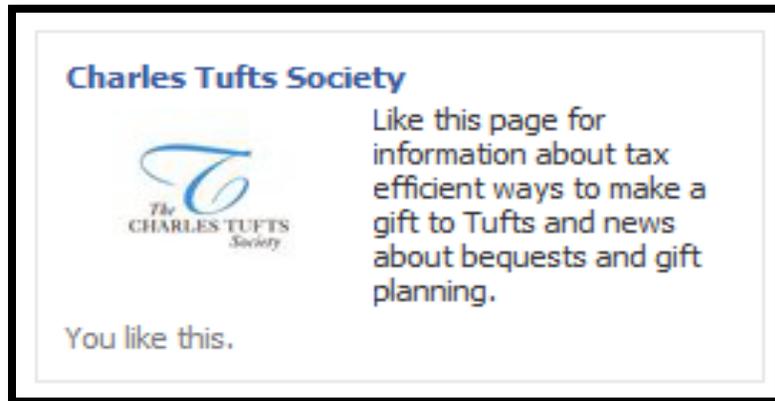
Facebook Ads

Facebook ads allow you to target specific audiences based on the demographic data that Facebook has collected from its users. Ads can promote your page or promote an event, for example, and they can be very inexpensive.

For example, the first ad that we created to promote Tufts' gift planning page was targeted to the following demographic:

- Aged 40 and over
- Interested in Tufts University, Tufts alumni, Fletcher school

- Living in the U.S.
- Who do not already “like” the Charles Tufts Society Facebook page



Facebook offers a wide range of demographic data that you can use to tailor the ad for a specific audience, and lets you know how many people each combination of criteria will reach. Ads can include links to Facebook pages or link to websites outside of Facebook.

Some of the Criteria Available for Targeting your Ad

- Graduates from specific high school, college, university
- “Likes” or has an interest in specific institution
- Live in city/state/county
- Age
- Gender
- Connected to people who like your page, or people who have friends connected to a particular page
- Activities
- Business/Technology
- Ethnicity
- Events (e.g. new job, has birthday in 1 week, recently moved)
- Family Status (e.g. new parent, newlywed)
- Games
- Movies, Music, Shopping, Travel
- Sports (e.g.. people who like your college team)

Example Facebook Ads:

To get your creative juices flowing, below are some suggestions for ads that could be tailored using specific demographic criteria that can be found in Facebook’s Ad Manager.

If you are a community foundation

Create an ad that promotes a retirement planning workshop. Your workshop could include information about using an IRA, or other retirement plan, as a great way to make a tax-efficient planned gift. Target the ad to “Baby Boomers” who live in the geographic area covered by your foundation.

If you are an educational institution

Create an ad that leads people to your gift planning website to learn more about leaving a legacy. Ads can include up to 90 characters (with spaces) so what about something like, “Love Acme U? Learn How to Leave a Legacy.” Target the ad to alumni and/or people who have indicated that they are interested in your institution, who are over the age of 50, and who live in the United States.

If you are a hospital

Create an ad that links to the gift planning page on your website that says something like “Help Memorial Hospital Save Lives Now and Forever” and target the ad to people over the age of 50 who have indicated they have an interest in your hospital or medical center.

If you are a social welfare organization

Create an ad that says “Change takes time. Support the ABC today and tomorrow” and link the ad to a specific site that uses the same language and invites donors to make both an annual fund gift and receive information about including your charity in their wills or other estate plans. Target the ad to people over 40 who have indicated they are interested in your charity, or in the specific subject your charity addresses (poverty, women’s health, the environment, rivers, etc.). An additional suggestion is to make different versions of the ad and target each one using specific interest keywords in order to test which interest keywords provoke the highest response.

Target people who are likely to be updating their estate plans

Offer a free estate planning organizer (including your suggested charitable bequest language) to anyone connected to your charity who is a “Newlywed (1 year)” or “Parents (Child 0-3)” since these are life events after which people typically create or update their wills.

Target people who are updating their retirement beneficiary information:

Send people to a page on your website with information about the benefits of naming your charity as a remainder beneficiary of their retirement plan. Target the ad to people who have indicated they have “Event – New Job” and have indicated they have an interest in your charity.

As with all gift planning marketing, there are artful and ham-handed ways to communicate these messages. Since social media does allow you to target people very specifically, remember to be close, but not creepy.

Case Study in Using Facebook as Part of a Multi-Channel Marketing Campaign

Tufts University has benefited from using social media as part of a multichannel planned-giving marketing approach. In July 2012, Tufts offered a customized Estate Planning Organizer to donors. The organizer was offered through print, email, and social media marketing.

The goal of the marketing piece was to offer something of value so that donors who were interested in estate planning would identify themselves. The secondary goal was to disseminate Tufts’ suggested bequest language; that information was clearly secondary and was provided at the back of the Estate Planning Organizer. Additionally, Tufts intended to use the Estate Planning Organizer as a way to gather metrics that would test the effectiveness of print postcards vs. email blasts vs. Facebook advertising.

Print Postcards

Tufts University has traditionally sent out print pieces about gift planning that invited alumni and friends to respond by sending in a reply card, or by calling or emailing the office for more information. For the past five years, we have sent out an average of three postcards per year, and while we have tracked the reply cards, we weren’t tracking all the ways that people could respond, including through phone calls and emails in response to the print postcard.

For this marketing piece, the print postcard did have a traditional reply card that allowed donors to request a copy of the Estate Planning Organizer which would then be mailed to them. In addition, we gave people the option of downloading a PDF copy of the organizer from our website. In order to track how many people downloaded the PDF as a result of the print postcard, we created a specific web “landing page” that was uniquely tied to the postcard.

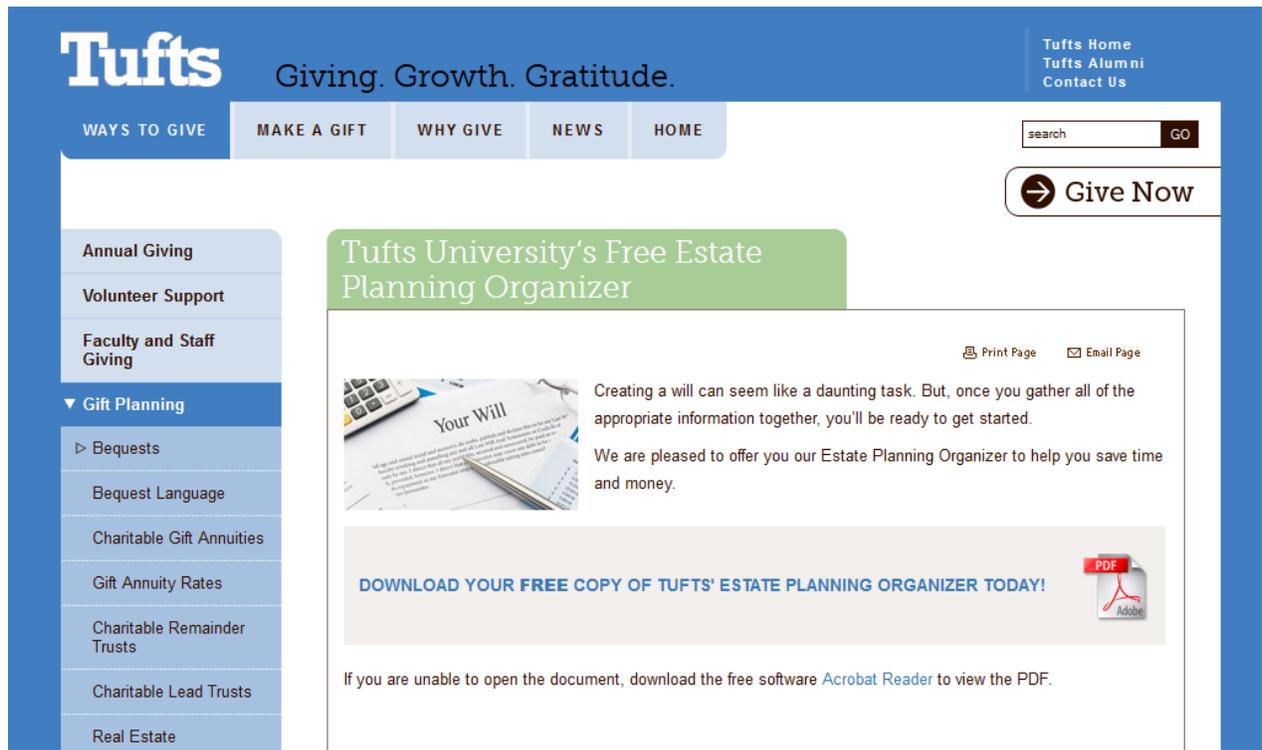
Here are the results for the print postcard:

	# of people mailed	# of direct PDF down-loads from website*	<i># of reply card requests for a paper copy</i>	<i># of email requests for a paper copy</i>	<i># of phone calls for a paper copy</i>	Total response (down-load and paper copy)	Cost for postcard (printing, fulfillment postage)	Design	Cost per respondent
Postcard	29,400	63	119	0	9	191	\$13,308	Free-lance designer	\$69.67

*If we count everyone who clicked/visited link as someone who downloaded the PDF

In other words, we sent out 29,400 postcards and 128 people requested that we mail them a paper copy of the Estate Planning Organizer and an additional 63 people downloaded it directly from our website. Calculated on a per-response basis, we spent \$69.67 to identify each person who was interested in Tufts’ Estate Planning Organizer.

Here's what the landing page on Tufts' gift planning website looked like:



Email Blast

We tried to time it so that the postcard, email, and Facebook advertisement all happened at about the same time. Because the print postcard was mailed using Tufts' nonprofit indicia, we sent the email two weeks after the postcard went out in the hopes that it would arrive at about the same time. We targeted the same group from the postcard with the email but it ended up being a smaller group, as we either do not have email addresses for all the postcard recipients or they have chosen to opt out of Tufts' email blasts.

Here are the results for the email blast:

	# of people emailed	# of emails opened	# of direct downloads of PDF from website*	# of email requests for a paper copy	# of phone calls for a paper copy	Total response (download and printed copy)	Cost of email (printing, fulfillment, postage)	Design	Cost per respondent
Email Blast	14,849	2,880	340	14	0	354	\$0	Internal designer	\$0.00

*If we count everyone who clicked/visited link as someone who downloaded the PDF

Like the postcard, the response to the email was immediate. The email led individuals to a separate landing page to track the number of people who downloaded the PDF from the email blast and it was the most popular method for receiving the Estate Planning Organizer. No one called the Gift Planning Office for a paper copy, but a small number of people did request a paper copy by email. A few phone calls and emails came in from individuals who had some technical difficulties, mostly related to accessing a PDF.

Of the people who received the email, 19 percent opened it, and of the people who opened it, 12 percent downloaded the PDF of the Estate Planning Organizer.

Here's what the email blast looked like:

From: " Tufts University" <onlinecommunity@tufts.edu>

Date: July 12, 2012 1:17:29 PM EDT

To: Tufts alumni

Subject: Tufts' Free Estate Planning Organizer will save you time and money



Thinking about creating or updating your will?

Tufts' [FREE estate planning organizer](#) will help you gather all of the appropriate information together, so you'll be ready to get started.

Creating a will can seem like a daunting task. Tufts' estate planning organizer will help you collect the relevant financial and personal records and begin to think about estate planning decisions you'll need to make. Locating these items and thinking through these choices in advance will save you time and money when you meet with your attorney.

Download our FREE organizer today!

Or, if you prefer, send an email to giftplanning@tufts.edu or call 1-888-748-8387, and we will send the organizer to you by email or regular mail.

When you put your plans in place, **please consider including a [bequest](#) for Tufts.** Your gift will have an impact at Tufts for years to come.

Questions? Contact us:

Tufts Gift Planning Office
80 George Street, 3rd Floor
Medford, MA 02155
Phone: 1-888-748-8387
Email: giftplanning@tufts.edu
Web: www.tufts.edu/giftplanning
Facebook: www.facebook.com/CharlesTuftsSociety

The Gift Planning Office is prohibited from giving legal or financial advice, and nothing provided in this message should be interpreted as such. We encourage you to consult with your own advisor before creating an estate plan.



Having trouble with the links? Please copy and paste the URLs below into your Internet browser:

Free estate planning organizer:

http://giving.tufts.edu/ways_to_give/giftplanning/bequests/organizer2.html

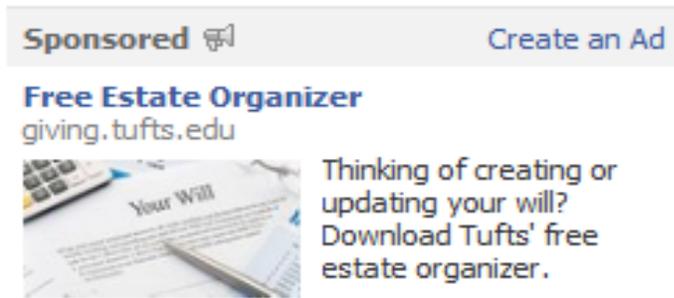
Learn more about bequests:

http://giving.tufts.edu/ways_to_give/giftplanning/bequests.html

Facebook Ad

Tufts already has a Facebook page to promote gift planning. It is branded in the name of Tufts' legacy society and is used to send out "news about bequests, gift planning, and tax-efficient ways to support Tufts," at www.facebook.com/CharlesTuftsSociety.

The Gift Planning Office had promoted the Charles Tufts Society Facebook page with a paid Facebook ad in the past, so we knew it was possible to specifically advertise to a Tufts audience through Facebook.



The Facebook ad targeted the following demographic of 12,640 users:

- live in the United States
- are exactly 40 years old and older
- “like” tufts alumni, tufts university, #Tufts University, #The Fletcher School of Law and Diplomacy, #Tufts University School of Dental Medicine, #Cummings School of Veterinary Medicine, or fletcher school at tufts university

Note: Past advertising taught us that we got better results when we targeted the advertisement to people who indicated they “liked” one of Tufts’ Facebook pages as an “interest” as opposed to people who had indicated they were Tufts alumni as part of their Facebook profile. When we targeted all Tufts alumni on Facebook, the unhappy memories of a few alumni who didn’t have a good experience at Tufts were reflected in their comments. The people who indicated they were “interested,” by definition, liked Tufts. Many of the people who flagged Tufts as an “interest” were also alumni.

Here are the results from the Facebook ad:

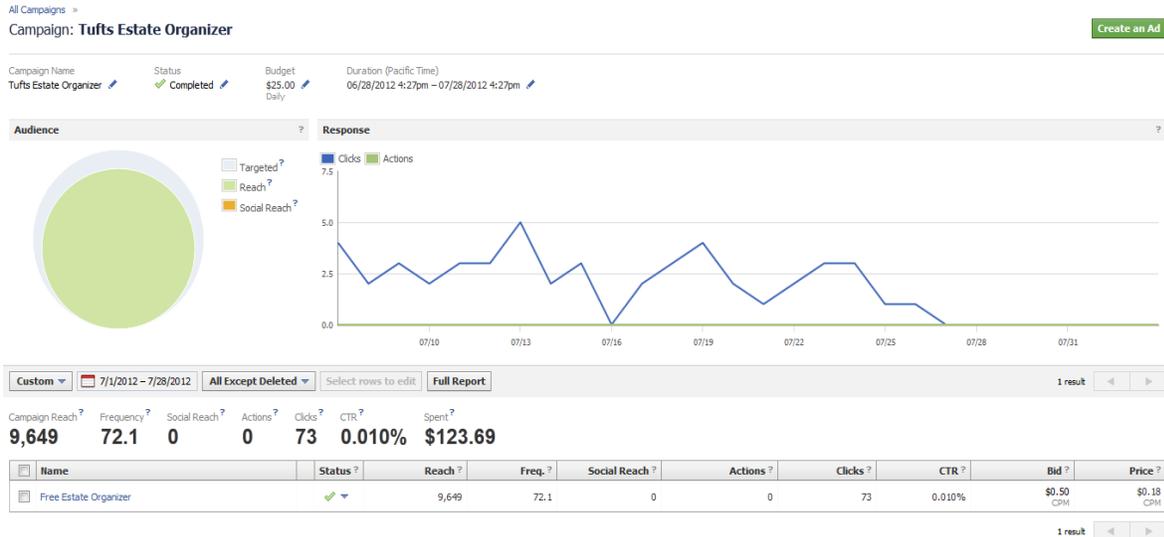
	# of people in target audience	# of people reached	# of direct downloads of PDF from website*	# of requests for paper copy	Total response (download and printed copy)	Cost for ad placement	Design	Cost per respondent
Facebook Ad	12,640	9,649	73	0	73	\$123.69	Gift Planning created ad	\$1.69

*If we count everyone who clicked/visited link as someone who downloaded the PDF

We ran the ad for a month, which is a very long time for a Facebook ad, and once again, we had posted a link that led to a separate landing page to track people who downloaded the PDF of the Estate Planning Organizer through the website. While the number of respondents was lower overall, the cost per respondent was also low due to the inexpensive nature of the advertisement.

Facebook advertisements come with built-in metrics. Our ad was seen by 9,649 people out of our total potential audience of 12,640 Facebook users (those who met our targeted criteria), who each saw the ad an average of 72.1 times. Our ad was clicked on 73 times for an average click through rate of 0.010 percent. The total cost of running the ad for the month was \$123.69, for an average cost of \$1.69 per respondent.

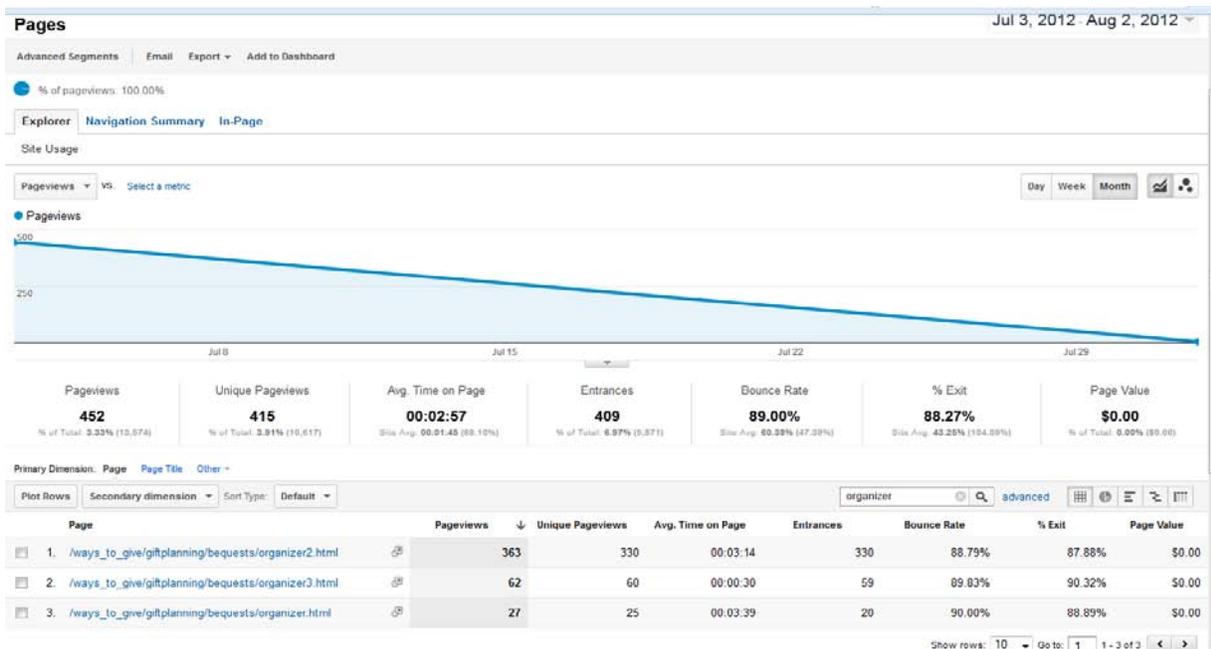
Facebook’s advertising metrics:



Google Analytics

One of the advantages of employing different landing pages is that it gave us the ability to use the metrics provided by Google Analytics to let us know how many people downloaded the PDF of the Estate Planning Organizer through each of the marketing channels (print postcard, email blast, and Facebook ad).

Here is a sample of what the Google Analytics looked like for part of the time our campaign ran:



Conclusions for the Multi-Channel Marketing Project

	# of people mailed or targeted	# of people who opened email or reached by ad	# of direct downloads of PDF from website*	# of reply card requests for paper copy	# of email requests for a paper copy	# of phone calls for a paper copy	Total response (PDF download and printed copy)	Cost (printing, fulfillment postage for postcard or ad placement)	Design	Cost per respondent
Post-card	29,400	n/a	63*	119	0	9	191	\$13,308	Free-lance design	\$69.67
Email Blast	14,849	2,880	340*	0	14	0	354	\$0	Internal design	\$0.00
Facebook Ad	12,640	9,649	73*	0	0	0	73	\$123.69	Gift planning created	\$1.69
TOTAL	n/a	n/a	476	119	14	9	618	\$13,431		\$21.73

*If we count everyone who clicked/visited link as someone who downloaded the PDF

The email blast elicited the greatest number of requests for a copy of the organizer and it was the most cost effective.

While the postcard was the most expensive, the reply card, phone call, and email requests for a paper copy of the organizer were the only methods that allowed us to track the names of the specific individuals who replied.

Advertising on Facebook doesn't mean advertising only to young people, because ads allow you to target a specific age group.

Creating a Facebook advertisement using the "cost per thousand impressions" method to a highly targeted group is cost effective.

Other results from this project included 11 new people who let the Gift Planning Office know that they have a gift for Tufts in their estate plans, one new bequest intention that a donor has already put in their plans and a second bequest intention in progress as a result of the Estate Planning Organizer marketing effort. The postcard had a checkbox on the reply card asking people to let us know if they already have Tufts in their estate plans. Neither the email nor the ad, as created, allowed us to obtain this information directly.

We also saw from this effort a wide age range of people responding to the postcard mailing, which indicates that individuals of all ages among our alumni and friends are thinking about estate planning. This reinforced our understanding that Gift Planning marketing should not be limited to our most senior supporters.

Next Steps for Social Media Marketing Metrics at Tufts

In order to use these metrics to drive the gift-planning marketing strategy in the future, we must look for ways for email and social media users to reveal their identities to allow for specific tracking and follow-up.

Ultimately, the best marketing channel is the one that inspires the most/largest gifts and the reality is that this won't be known for some time. Going forward, it would be a worthwhile project to tie realized bequests back to marketing responses.

None of the landing page metrics reveal the age demographics of those who visited our site from our email or Facebook ad. Were the people who clicked through the Facebook ad younger than the people who downloaded the PDF through the email blast? We will look for additional metrics that can give us this information in the future.

Conclusion

The social media landscape changes quickly and it is hard to keep up with the changes if you aren't a regular user. If you don't really like Facebook and social media yourself, partner with other people in your organization who do and invite them to help you explore ways to use social media to share your message.

If you do use Facebook yourself, use your personal experiences as a mini-case study. How do you like to interact with people and pages on Facebook? What types of posts most interest you?

Experiment and try things out. One of the great things about social media is that you can delete anything that misfires or simply stop doing things that aren't working.

Facebook and other social media are shaping new ways for individuals to define who they are, what they like, and how they share that information with the world. We already know that the charities people support are an important aspect of their self-identity. What we need to learn is how people will want to express that aspect of their lives through social media.