



Social Media: Getting Results for Planned Gifts



Date: May 30, 2013
Time: 1:00 – 2:30 Eastern Time
Presenter: Rebecca Scott
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Tufts University School of Medicine





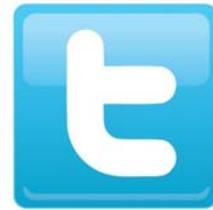
Agenda

- An overview of the social media landscape
- Facebook pages and advertising
- Integrating social media into your planned giving communications



Social Media: Today's Major Players

- Facebook
- Twitter
- Pinterest
- Instagram
- Tumblr



Instagram



Facebook

- Allows you to link to “friends” and “like” businesses, groups, or charities, for example.
- You can post status updates (text, links, photos, and videos) about your life for your friends to see.
- You can set your account to be more or less private.



Facebook

- Facebook earnings report on 1/30/2013
 - 1.06 billion monthly active users (MAU) as of December 31, 2012
 - 618 million daily active users (DAU) for December 2012
 - 680 million mobile MAUs as of December 31, 2012



Twitter

- Your posts are limited to 140 characters.
- All posts are public.
- You can follow people and be followed, and these people may or may not be your friends (celebrities, experts, authors, journalist, etc.).
- You can search subjects by hashtag (#). For example, #plannedgiving or #oscars.



The Others

- Pinterest – online scrapbooking
- Instagram – photo sharing with cool filters
- Tumblr – short form blogging



“Demographics of Social Media Users” – Pew Research Center Study (February, 2013)

	% of internet users who use...	This 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



“Coming and Going on Facebook” — Pew Research Center (February, 2013)

“As recently as September 2009, 47% of online adults used social networking sites.

Today 69% of online adults — representing more than half of the *entire adult population* in the United States — use an online social network of some kind.

On a typical day nearly half of all adult internet users access a social networking site.”



“Coming and Going on Facebook” – Pew Research Center (February, 2013)

“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...”



Facebook Demographics - Pew Research Center

- Facebook users
 - “Facebook remains the most-used social networking platform, as two-thirds of online adults say that they are Facebook users. Women are more likely than men to be Facebook users, and Facebook use is especially common among younger adults.”



Facebook Demographics - Pew Research Center

% of internet users who use Facebook

Gender	
Men	62%
Women	72%

Age	
18-29	86%
30-49	73%
50-64	57%
65+	35%



Facebook Demographics - Pew Research Center

% of internet users who use Facebook

Educational Attainment	
Less than high school/high school grad	60%
Some college	73%
College +	68%

Household Income	
Less than \$30,000 per year	68%
\$30,000 - \$49,999	62%
\$50,000 - \$74,999	69%
\$75,000 +	73%



Facebook Demographics - Pew Research Center

% of internet users who use Facebook

Urbanity	
Urban	72%
Suburban	65%
Rural	63%



Promoting Gift Planning Through Facebook

To have a gift planning page, or not to have a page, that is the question.



facebook

Search for people, places and things

Rebecca Scott

You are posting, commenting, and liking as Rebecca Scott — Change to Charles Tufts Society



Charles Tufts Society

506 likes · 1 talking about this · 0 were here

Liked

Message

College & University

News about bequests, gift planning, and tax efficient ways to support Tufts.

About



Photos



Likes



Map



Videos



Advantages of Having a Facebook Page

- You can build a community of people who are specifically interested in gift planning.
- You can get to know that community by interacting with them.
- You can provide specific planned giving news alerts (new CGA rates, IRA rollover extensions).
- You can steward donors and/or legacy society members by noting their activities.



The Disadvantages of Managing a Page

- You must understand Facebook's algorithm, *Edgerank*, in order for your posts to be seen in people's news feeds.
- Need to post consistently in order for your page to be active and vital.



What is Edgerank?

- Most people who “like” your page rarely actually visit your page.
- Instead, they see your posts in their news feed.
- comScore reports that 40% of users’ time is spent in their news feed and only 12% on profile and brand pages.



What is Edgerank?

- The algorithm is trying to figure out what each user wants to see most.
- It is comprised of:
 - Affinity
 - Weight
 - Time Decay



What is Edgerank?

EDGERANK

$$\sum_{\text{edges } e} u_e w_e d_e$$

- u** Affinity score between viewing user and edge creator
- w** Weight for this edge type (status, comment, like, tag, etc.)
- d** Time Decay factor based on how long the edge was created

www.jonloomer.com



What is Edgerank?

- You will see more posts when:
 - You interact more with that author
 - You interact more with that type of post
 - Many of your friends/users have interacted with a post
- You will see posts less frequently when users give a post negative feedback

• from Postrocket.com



What is Edgerank?

- Does Edgerank favor photos? Text updates? Videos? Are links to articles bad?
- You are looking for the widest reach and you have to experiment.
- Edgerank favors what your fans like. So you need to figure that out. Do they engage with photos, text, at a particular time of day, etc.?



What is Edgerank?

- While Edgerank may make for a better user experience, it is more work to make sure your fans see your posts than it used to be.
- You have to decide if you want to create and maintain your own gift planning page or to post gift planning messages to your charity's main page.



Two Quick Tips on News Feeds

- You can toggle between “Top Stories” and “Most Recent” where it says “sort” under the status update box.
 - “Top Stories” uses Edgerank, so you can see how it filters the stories you see.
 - “Most Recent” does not use Edgerank, so you will see everything that your friends, and other pages you like, post.



Two Quick Tips on News Feeds

- You can make sure you are notified about all the posts from a page by checking “get notifications” from the drop-down menu under “like” or “friends.”
 - Or by making someone a “close friend.”



Types of Posts - Impact



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)



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.





Types of Posts – Timely News



Charles Tufts Society shared a link.
February 27

Struggling to understand the new federal estate tax rules that resulted from recent legislation? You might find this helpful explanation useful for your planning.



New estate tax rules call for new planning tactics
www.reuters.com

NEW YORK (Reuters) - After years of changes and political arm-twisting, the federal estate tax rules became clear and stable with the



Charles Tufts Society shared a link.
April 3

The April 15 deadline for filing your taxes is fast approaching! For those of you who are still working on your taxes, here are some tips from the IRS to ensure your charitable deductions really pay off, including any gifts you made to Tufts in 2012.

Nine Tips on Deducting Charitable Contributions
www.irs.gov

Giving to charity may make you feel good and help you lower your tax bill. The IRS offers these nine tips to help ensure your contributions pay off on your tax return.



Types of Posts - Credibility

 **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

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



Types of Posts - Stewardship



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 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.



Facebook Insights

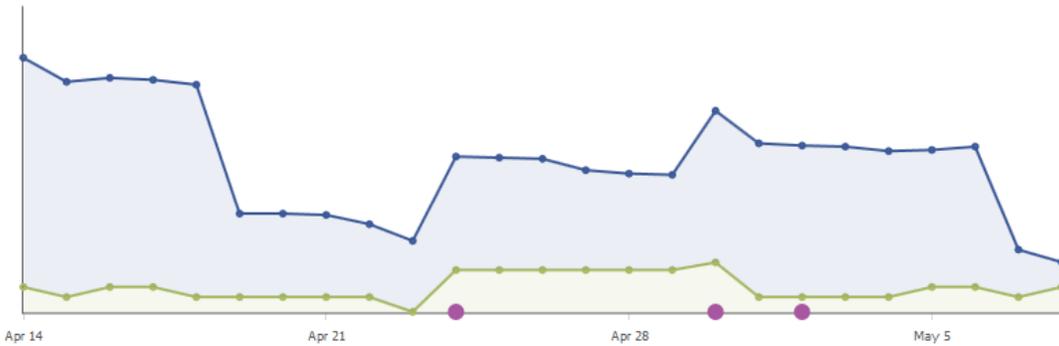
Overview Likes Reach Talking About This Check-Ins

All dates and times are in Pacific Time

Export Data

Total Likes[?] 508 ↑0.59% Friends of Fans[?] 265,792 ↑0.48% People Talking About This[?] 4 ↑300% Weekly Total Reach[?] 23 ↓-80.34%

Posts[?] People Talking About This[?] Weekly Total Reach[?]





Facebook Insights

Date ?	Post ?	Reach ?	Engaged Users ?	Talking About This ?	Virality ?	
4/3/13	The April 15 deadline for filing your taxes i...	314	14	3	<div style="width: 0.96%;"></div> 0.96%	
2/12/13	Hairstyles come and go, but some things ...	253	34	10	<div style="width: 3.95%;"></div> 3.95%	
3/5/13	Warning, "Downton Abbey" fans: spoilers ...	226	20	9	<div style="width: 3.98%;"></div> 3.98%	
11/21/12	Every day, we are grateful for the wonde...	205	30	17	<div style="width: 8.29%;"></div> 8.29%	
9/18/12	This Wall Street Journal article illustrates ...	199	14	3	<div style="width: 1.51%;"></div> 1.51%	
10/4/12	Our office gets a lot of questions about w...	196	14	2	<div style="width: 1.02%;"></div> 1.02%	
1/15/13	Are you trying to sort through the new C...	168	13	3	<div style="width: 1.79%;"></div> 1.79%	
1/4/13	Is updating your financial and estate plan...	150	5	--	--	
11/27/12	This holiday season, start a new tradition ...	147	12	5	<div style="width: 3.4%;"></div> 3.4%	
10/17/12	When drawing up her estate plans, Anna ...	146	15	5	<div style="width: 3.42%;"></div> 3.42%	



Facebook Insights

- 60% of our fans are over 45

People Who Like Your Page (Demographics and Location) [See Likes](#)

Gender and Age [?]



Countries [?]

- 478 United States of America
- 3 India
- 2 United Kingdom
- 2 Ethiopia
- 2 China
- 2 Canada
- 2 Italy

Cities [?]

- 63 Boston, MA
- 20 Medford, MA
- 18 New York, NY
- 13 Somerville, MA
- 12 Los Angeles, CA
- 11 Washington, DC
- 8 Brooklyn, NY

Languages [?]

- 478 English (US)
- 16 English (UK)
- 2 Korean
- 2 Greek
- 1 Russian
- 1 Spanish
- 1 French (France)



Facebook Ads

- Allow you to build your audience.
- Can be cheap and you can set daily or total maximum spend amounts (\$5 or \$10/day).
- Pay per 1000 impressions or pay per click.
- Target specific messages to specific audiences.



Facebook Ads

Charles Tufts Society



The logo for The Charles Tufts Society, featuring a stylized blue 'T' above the text 'The CHARLES TUFTS Society'.

Like this page for information about tax efficient ways to make a gift to Tufts and news about bequests and gift planning.

You like this.



Facebook Ads – Ads vs. Sponsored Stories

Ad Preview [Edit](#)

Tufts Alumni - School of Medicine
 Be true to your school. Like this page to keep up-to-date with Tufts Medical Alumni news.



You like Tufts Alumni - School of Medicine.

[View on Site](#) · [Create a Similar Ad](#)

Targeting [Edit](#)

- This ad targets 7,540 people:**
- who live in the United States
 - who like #Tufts Medical Center
 - who are not already connected to Tufts Alumni - School of Medicine

Close

<input type="checkbox"/>	Tusm Likes tufts alumni Sponsored Stories	0	0	0.0	0	0.000%	Optimized
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Sponsored Story Preview [Edit](#)

 Rebecca Scott likes Tufts Alumni - School of Medicine.



Tufts Alumni - School of Medicine
[Like](#)

Targeting [Edit](#)

- This sponsored story targets 940 users:**
- who live in the United States
 - who like tufts alumni
 - who are not already connected to Tufts Alumni - School of Medicine
 - friends of people who liked the page Tufts Alumni - School of Medicine, friends of people who checked in to the page Tufts Alumni - School of Medicine or whose friends are already connected to Tufts Alumni - School of Medicine



Facebook Ads

- Potential Criteria to Target Ads
 - Graduates from specific high school, college, university
 - “Likes,” or has an interest in, specific charity
 - Live in city/state/county
 - Age
 - Gender
 - Connected to people who like your page, or people who have friends connected to a particular page



Facebook Ads

- Potential Criteria – Broad Categories:
 - Activities
 - Business/Technology
 - Ethnicity
 - Events (e.g. new job, recently moved)
 - Family Status (e.g. new parent, newlywed)
 - Movies, Music, Shopping, Travel
 - Sports (e.g.. people who like your college team)



Facebook Ads – Ideas for Targeting Ads

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.



Facebook Ads – Ideas for Targeting Ads

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.



Facebook Ads – Ideas for Targeting Ads

- Example ads in the corresponding paper:
 - Educational institutions
 - Social welfare charities
 - Hospitals

Remember... be close, but not creepy!



Facebook Ads – Rebecca’s Crystal Ball

You will be able to buy ads based on
status update keywords.



Facebook Ads

- A great idea to reach out to your alumni/fans
 - Run an ad that shows up a week before their birthday and invite them to “Click here to receive a special birthday gift.”
 - They click through to a page where they have to fill out some demographic information you are looking for, and then you send them a small birthday gift, like a keychain, bookmark, etc.



Integrated Campaign Case Study

- To test the reach of different platforms, Tufts ran an integrated campaign last summer:
 - Print postcard
 - E-blast email
 - Facebook ad
- We offered donors the opportunity to receive a free estate planning organizer.



Integrated Campaign Case Study

Goals:

1. To offer something of value so that donors who were interested in estate planning would identify themselves.
2. To disseminate Tufts' suggested bequest language.
3. To gather metrics that would test the effectiveness of print postcards vs. email blast vs. Facebook advertising.



Integrated Campaign Case Study

- Here are the print postcard results

	# of people mailed	# of direct PDF downloads from website*	# of reply card requests for a paper copy	# of email requests for a paper copy	# of phone calls for a paper copy	Total response (download 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



Integrated Campaign Case Study

The screenshot shows the Tufts University website with the following elements:

- Header:** Tufts logo, tagline "Giving. Growth. Gratitude.", and navigation links: Tufts Home, Tufts Alumni, Contact Us.
- Navigation:** "WAYS TO GIVE" menu with sub-items: MAKE A GIFT, WHY GIVE, NEWS, HOME.
- Search:** Search bar with "GO" button.
- Call to Action:** "Give Now" button with a right-pointing arrow.
- Left Sidebar:** Menu items: Annual Giving, Volunteer Support, Faculty and Staff Giving, Gift Planning (expanded), Bequests, Bequest Language, Charitable Gift Annuities, Gift Annuity Rates, Charitable Remainder.
- Main Content:** Article titled "Tufts University's Free Estate Planning Organizer". It includes a sub-header "Your Will", an image of a document and calculator, and text: "Creating a will can seem like a daunting task. But, once you gather all of the appropriate information together, you'll be ready to get started. We are pleased to offer you our Estate Planning Organizer to help you save time and money." It also features "Print Page" and "Email Page" icons.
- Footer of Article:** "DOWNLOAD YOUR FREE COPY OF TUFTS' ESTATE PLANNING ORGANIZER TODAY!" with a PDF icon.



Integrated Campaign Case Study

- Here are the results of the e-blast email:

	# 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

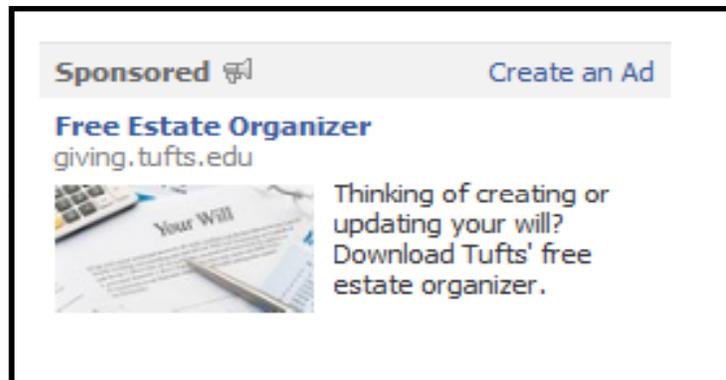
*If we count everyone who clicked/visited link as someone who downloaded the PDF



Integrated Campaign Case Study

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





Integrated Campaign Case Study

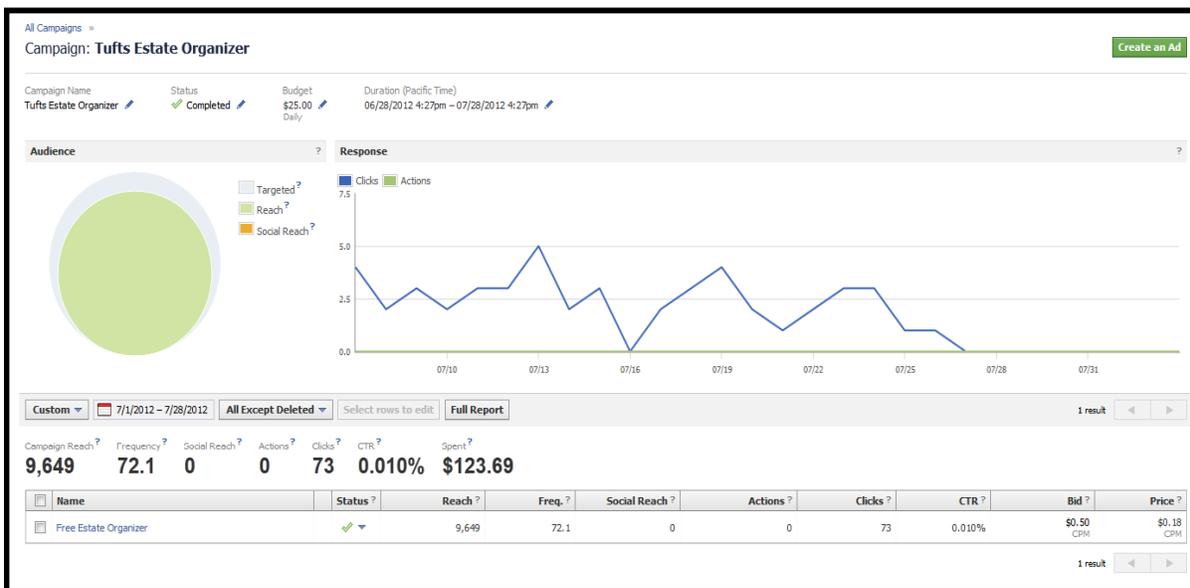
- Here are the results of the Facebook Ad:

	# 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 Office created ad	\$1.69

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

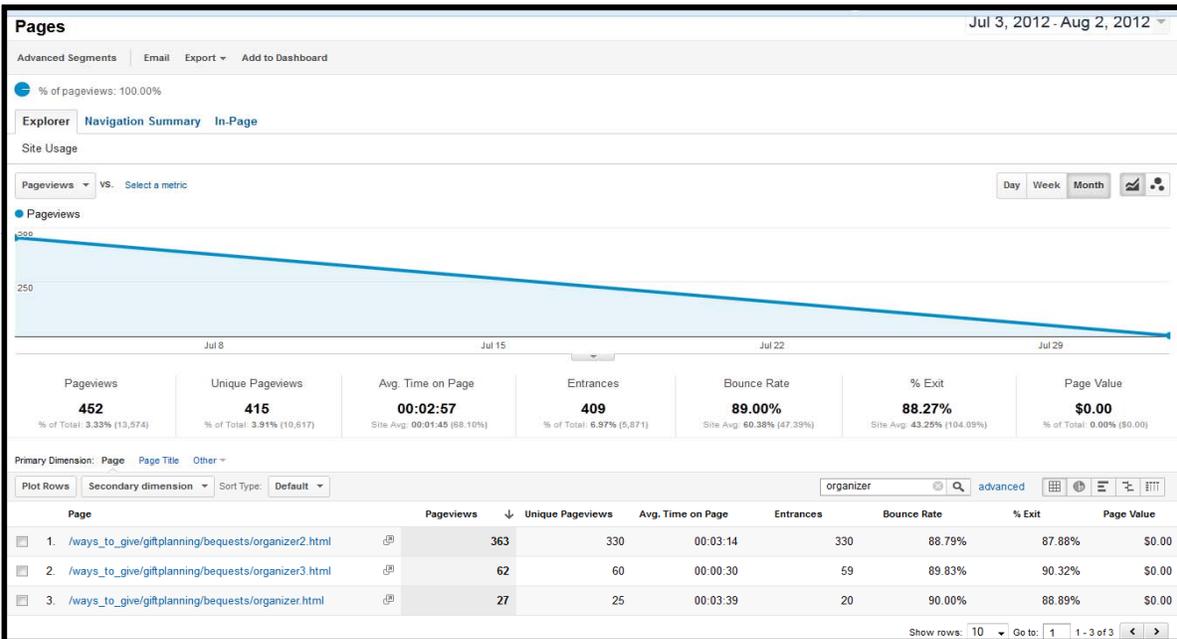


Integrated Campaign Case Study





Integrated Campaign Case Study





Integrated Campaign Case Study

	# 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
Postcard	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 Office created	\$1.69
TOTAL	n/a	n/a	476	119	14	9	618	\$13,431		\$21.73



Integrated Campaign Case Study

Conclusion

- 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.
- None of the landing page metrics reveal the age demographics of those who visited our site from our email or Facebook ad.



Final Thoughts

- Experiment.
 - You can always delete.
- Use your own experience as a guide.
 - How do you use social media in general and Facebook in particular?
- If you aren't a fan of social media, partner with someone at your organization who is.



Questions and Answers





Still Have a Question?

Contact: Rebecca Scott
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E-mail: rebecca.scott@tufts.edu

Twitter: [@rebeccascott](https://twitter.com/rebeccascott)

www.facebook.com/charlestuftssociety