

William Paterson University

Social Media—A New Tool for Prospect Research and Constituent Engagement



Creating opportunities for alumni and constituent engagement is a priority in William Paterson University's advancement office. The culture of the department goes well beyond securing gifts—they seek to create a dynamic community where people want to give because they've had a positive experience with the University. In fostering good will, the University looks for opportunities to "give back" and celebrate alumni and constituent accomplishments. One new strategy for building engagement is the application of social media techniques to support networking, prospect research and cultivation.

Located just outside Wayne, New Jersey, William Paterson is a state University with nearly 12,000 students and a database of over 60,000 alumni. Over the past three years, William Paterson has seen their alumni giving affected by the economic recession and is laying the groundwork across all of their fundraising programs for stronger returns as the economy improves.

Lynn Lazar, Director of Prospect Research and Research Management, outlines three key tactics for growth and engagement:

- » Applying social media for both prospect research and alumni/constituent cultivation
- » Boosting alumni relations programs through social networking
- » Inviting alumni back to campus facilities for events, including high-level cultivation events with the University's President

Applying Social Media to Engagement Activities

As William Paterson works to engage donors and alumni, they layer social media techniques, intersecting multiple departments, to maximize every possible opportunity and connection for a "touch" or gift. Their dedicated use of social media has helped them:

- » Create an active online community for the University
- » Identify new prospect lists through surveys and tracking affinity postings on the University's social media pages
- » Enhance prospect research by uncovering new biographical and contextual information that can help verify a profile and/or ignite new thinking around a cultivation approach and its timing
- » Encourage situations where alumni and other constituents are motivated to give because they have positive feelings towards the University

“We found a need to develop programs for alumni engagement to get their feet back in the door on University grounds” says Lazar. “So, we began to design programs that appealed to their interests, such as jazz or classical music concerts, art exhibits, or educational lectures. This has helped us customize our interactions with constituents and bring focus to special events and outreach. Social media is a useful tool in the process—we use it to identify, track and promote alumni interests. For example, we’ll pose a question on Facebook about a jazz artist that is coming to the University and those that respond are then noted in our database and invited to the event.”

Beyond events, social media also supports prospecting activities. “For us, looking at social media while conducting prospect research helps put together the pieces of the puzzle, sometimes even creating new opportunities to deepen a relationship.” says Lazar. “While it is not the most important research tool we use and we are careful to validate the data uncovered, it is a resource that can enhance a profile.” For example, as they assemble a prospect profile, Lazar and her team first use WealthEngine to gain an understanding of hard assets, philanthropy and other biographical characteristics.

Depending on the findings, they then will do a social media search, consider its validity, and apply sound information gathered from Facebook, LinkedIn, Twitter and other social sites to the profile. In some cases, it broadens their understanding of the prospect by showing interests, family structure, social networks, pictures, professional experience, etc.

“We really like LinkedIn because it can often validate a donor or prospect’s business and professional information,” adds Lazar. With the use of Google Alerts, they’ve also begun tracking news regarding alumni and send out weekly updates of newsworthy alumni. After a news alert is received about an alum—a promotion or other milestone—the Stewardship Manager sends a letter to them recognizing their news, sometimes it’s also posted on the University’s Facebook page. “There are many different ways to use the information gathered, for us it’s all about celebrating our constituents. Social media allows us to engage with alumni, donors, partners and the community in a faster, more meaningful and effective way.”

Techniques for Building Community

Through the use of postings on the University’s Facebook page, Lazar and others have begun to promote constituent milestones, alumni art exhibits/performances, and facilitate dialogue by posting questions and comments for followers. This technique brings alumni and donors back into the University’s fold. So far the feedback has been incredibly positive. For example, research staff identified an alumnus whose band had an upcoming performance and they sent a letter congratulating the lead singer on his accomplishments. They then promoted the concert on their Facebook page, encouraging other alumni to attend the show. “We had over 50 comments in response and the posting prompted many online conversations among followers,” explains Lazar.

“We are finding creative ways to use social media—not with the sole intention of bringing in money—but to create a buzz about us and help reconnect the University with alumni and friends. We are hopeful that this will support our engagement activities, which will ultimately help us reach our fundraising goals.”

- Lynn Lazar, Director of Prospect and Research Management,
William Paterson University

The alumnus who was performing proudly posted a copy of the letter he'd received from the University on his Facebook page, thanking them for their support. "Being fundraisers makes you so aware of the power of giving back," says Lazar "and despite the fact that some alumni aren't donors now, we're actively working to strengthen relationships for the good of William Paterson. The secondary benefit is the potential these relationships offer for new or increased future gifts."

The University also uses responses from Facebook postings to create prospect lists. They follow University threads and post survey questions on topics that identify affinity to certain programs and projects. Respondents can self-identify interest in arts programs, University news and other special projects—making them ripe for follow-up. Recently, the University began to post information about special events such as their legacy and golf events, resulting in increased traffic to their Facebook page.

In addition, they recently created an application through Iphone, Ipod and Andriod for virtual tours of William Paterson, as well as an application (Ask WillyP Mobile) which allows for constant communication with the University.

Knowledge Sharing Among Departments

At William Paterson, the research department has begun to share the anecdotal information gathered from social media with other departments such as development and alumni relations. Any notes or comments shared about individuals are placed within their integrated SunGard Banner Advancement system and filtered to the development office, increasing communication and efficiency between departments. "We took note of a Facebook posting by an alumna who mentioned her favorite flower and when a development officer wanted to reach out to thank her for a meeting, she knew what to send with the card. It may seem like a small thing, but we've found that these notes link multiple departments together to improve our understanding of our alumni, donors and prospects," shares Lazar.

Sometimes social media uncovers fundraising opportunity. "An alumni posted on Facebook that he had a new business venture," says Lazar. "While he had never given to the University before, we brought it to the attention of our alumni and marketing departments who then published an article in our alumni newsletter on him and other alumni in the same industry. He was appreciative and advancement began further cultivating the relationship. Today, we await news on a major gift request and have already been assured, at the very least, that he will give a \$1,000 scholarship gift."

"We're starting to see the impact we can make with the use of social media alongside our prospect research tools, and we like what we see," concludes Lazar. "Social media is helping us engage constituents in a bigger way and we are furthering our philosophy of giving back first, asking second."