



## **Using Social Media to Maximize your AFI Grant**

*AFI Virtual Coffee webinar Series*

**September 6, 2016**

Megan: Good afternoon and thank you so much. As I just mentioned, for joining our fourth and final webinar in the AFI Virtual Coffee webinar series. The name of this one again is “Using Social Media to Maximize your AFI Grant.” In this webinar, we’re going to talk about a variety of different ways that grantees have used social media effectively, and sometimes not so effectively. And really just have a conversation about how we can capitalize on social media to really culture and support our AFI grants and what might those ways be.

Just some context setting, these webinars in the series really have been intended to be really interactive and engaging. We want to provide a platform for grantees to be able to connect and learn from each other. Throughout this entire series, you’ve heard from some AFI grantees, partners, and had the opportunity to discuss tips, tools and generate ideas for successfully maintaining your grant. We want this to be the same, so we really want to hear from you.

Ok. So just to introduce, we’ve got myself, I’m the Senior Program Manager here at CFED. We have my colleague Alicia but she did not list herself, we also have Chris Kingsley from Las Casa, Kate Bovitz from Portland Housing Center, and Alex Moore from Community Works. You’ll hear from each of these grantees in just a moment.

But I’m going to go through some housekeeping details first. So, if once you connect to the audio, if you’re having trouble dialing in on the telephone which is typically the most effective way with getting quality audio on these, if you are having trouble go and ahead you can listen in on your computer, by clicking the option in the control panel. And go ahead and connect your speakers or headsets to your computer for best quality. If you’re having any technical difficulties please go ahead either type any questions have into that chat box or you can email my colleagues, at Alicia at [ahadley@cfed.org](mailto:ahadley@cfed.org). Just a couple final notes, this webinar is being recorded. All attendees are currently muted to ensure that sound quality of video recording and transcript will be available with this and all of the previously webinars on the [IDAresources.hhs.acf.gov](http://IDAresources.hhs.acf.gov) at a later date. This webinar will last approximately 90 minutes.

Alright, so the purpose of this webinar as I shared before is for participants to hear about tips and tools for developing, utilizing social media to support your AFI grant; hear from fellow grantees those I just listed talk about their experiences using social media, asks questions and share ideas for the best ways to use those social media to support your grant. You know, once again this webinar is intended to be a free space and a platform to connect and learn from each other from grantees around the county. So we hope you’ll keep comments and questions coming throughout the entire webinar. We’ll be collecting a sharing questions and responses from or end and either possibly following up on a later date to answer other questions.

Just a reminder, any questions or comments use that chat box in your screen, we’re continuously monitoring it on our end.

So first just a few questions for you, so we got some poll questions out here and we hope that you will answer them in the polls and let us know and let us know kind of where you're at in this poll. This whole social media utilizing, utilizing social media.

So the first question, is what types of social media are you currently using? So you'll see we've got Facebook, Twitter, LinkedIn, and there's an option for Other. And so if you're using some other type of social media, just go ahead and type it in there. I'll give you just a few minutes to answer that. Alright thanks for those responses. Ok, looks like about 94% of you are using Facebook, we got 56% using Twitter, about 40% of you using LinkedIn. And about 30% of you using other. So, if you chose other, please just share kind of what that other form of social media that your using through chat box so we can be aware of that, thanks everybody.

Alright, let's move on to our next poll. Alright, so at what stage or stages of the AFI project do you use social media? So some of our options here that you're going to see are: during recruitment; during enrollment; during savings period, as your savers or savings; or during asset purchase. So maybe that's your sharing of client's success stories or what not. Alright just give you a few minutes to answer these questions. Alright thanks everybody for answering those questions. It looks like the overwhelming majority of you all you use recruitment 77% that's the time that you use the social media. I'll be curious later, hopefully in the conversation with our guest grantees a couple of those about whether its recruiting the favor or really kind of just sharing the opportunity out maybe with other partners. What kind of recruiting is it indirect? Etcetera. Enrollment is another way we've got, 38% of you doing that, 23% was during the savings period, and then 38% during assets purchase. So that is fantastic thanks so much for sharing that information guys.

Alright, another poll. Are there any challenges that you are facing using social media tools more effectively? So here's where we want to talk about kind of how we make things better. The challenges here include: staff capacity, technical knowledge, relevant to target population or maybe reach even. Or lack of understanding on how to effectively utilize social media. So give just a minute for you all the answer these questions. Alright, great thanks so much for answering that. So it looks like 73% of you, not shocking, feel that staff capacity is a challenge to effectively using social media. Technical knowledge about 40% of you relevant to target population about 33% of feel that, interesting, and 73% of you share that knowing how to effectively social media is a challenge. So yeah, that's pretty interesting. Hopefully we can dive more deeply some of this a little bit later.

One more final question and then will get to our panelists and our discussion. What tools do you currently use or use it as your organization that helps you to manage your AFI project? And you can just go ahead and write that into the chat box. We'll give you just a minute to collect some of the responses to just curious if their certain tools, methods, there's a lot of different platforms for Twitter. There's different platforms for the combine Facebook, Twitter, all of that. If there's ones that we didn't even mention that are up there, we would love to hear. I would actually include mass text messaging. We hear about this a lot, one sort of.... It's not exactly social media, but it is a technological innovation. What's out there? What are you guys using? Or what would you even be interested in using? Give you a moment to type some response here. Awesome, we got some really good answers coming in, so Vista Share is one. So Excel is one, (inaudible) definitely a couple of people here sharing that there using websites, like their organizational website, MichiganIDA.com. I love this blog with the personal email, with a link to the blogs. So that's really interesting. Lots and lots of Goggle sheets, and knowing that's

definitely seeing in some cases, organizing using Google Forms, as a means of signing up for different things. Works kind of Google Groups, and chats for sharing information. So that's really interesting. Email, and phone calls primarily. Ok great, well keep those coming in, I think this is really useful. You got a lot of really good ideas coming through, but now I think what I'd like to do is go ahead and first turn it over to our other moderator for this session, Chris Kingsley. Chris would you like to go and introduce yourself?

Chris: Yes. I would. So thanks for having me on. Can you hear me alright?

Megan: Yup. we can hear you.

Chris: Alright great. Well, thanks for having me on and thanks everyone for joining us again. I'm looking forward to the conversation we're going to have today. Especially looking forward to hearing from our panelist as we think about the social media. I don't want to call the dilemma but it's kind of that nut that I think probably a lot of us who are the webinar are trying to crack, just a real quick context from myself. I'm from La Casa Inc., which is Community Development Corporation here in Goshian, Indiana. We are a pretty local organization mainly serving our own county and the surrounding counties. And we are a very manufacturing driven economy. And our not particularly on the cutting edge of technology. So we see as an organization of growing utilization of social media, of smart phones the whole deal. But we don't necessarily try and stay right on the front edge of that work because of the target population that we have. That said, we've been thinking about a lot recently about how to use that as an engagement tool. We talked about, and I would be really interested to hear about what other people have to share today, but we've talked about how do we create platforms for positive peer-influence for our savers where they can feel motivated, encouraged by each other. But social media can also accomplish just getting the word out there and hopefully getting people to share some of the stories of success and recruiting other supporters for the program and stakeholders. So really looking forward to hearing what different people are doing.

We've done some of the technological innovations, we do do the mass texting. We do a monthly mass text to our participants that just gives them feedback based on their savings from the previous month. And that's been something... I'm big into the behavior psychology and I'm interested in how we can do especially use technology to enforce and reinforce behavior change in the folks we're working with and that's been one that we had a lot of positive feedback on, and I think we're still looking at how to do really best use social media to accomplish some of those same purposes.

So I'm coming in to this, this is actually a webinar I was planning on attending, regardless and I'm coming into this really interested to hear from our panelist in terms of what they have to share and also just interested in some of the feedback that we'll hear throughout this session from all of you, who are participating.

So I think given that introduction kind of the path going forward is we're going to hear a little bit first from Kate Bovits from the Portland Housing Center. And she's going to share and present a little bit on how they've been using social media in their context for their IDA program. From there we're going to go in and hear from Alex Moore, from the Community Outreach, oh sorry, Community Works. And how they're doing things there and kind of throughout that we do want to just encourage you to be asking questions in the chat box. I'll be monitoring that so that as Kate shares if there's questions specific to what she's sharing about, I can kind of intervene and ask some of the questions and make sure we get

those and then we'll kind of break out into more of conversation. Some between the three of us but also inviting in questions and input from all of you who are in attendance today. So, Kate with no further ado, why I don't I turn it on over to you.

Kate: Alright thanks very much. I will start out with a brief overview of exactly who we are at Portland Housing Center, and what our IDA program has been and just a brief overview of our use of social media. And I will try to keep a lot of the details for the question and answer session. And of course, can share any of that any of that at any time.

So Portland Housing Center, we are a nonprofit organization we were founded in 1991. And we were founded to ensure that all Portland, Oregon residents have equal access to information and resources to achieve home ownership. We specialize in providing each of our homebuyers with education, counseling, financial resources, and other home buying support. We've helped more than 7,000 families become successful, financial secure, home owners. And we prepare the homebuyers for the challenges that they'll face and guide them through the home buying process. We also offer mortgages with fixed interest rates, that's kind of a separate part from the nonprofit.

So I administer the IDA program, the Individual Development Account program. I believe everybody on the webinar is familiar with the IDAs, sometimes I have to explain that, but as I understand everyone understands what IDAs are.

So we have had an IDA program since 2003 at Portland Housing Center. We received most of our funds from the state government. And AFI has been matching those funds with grants since 2008. So we've had a 131 AFI graduates since 2008. We had programs in 2008, 2012, and the most recent grant that we're administrating right now is from 2014. We currently have 86 AFI participants enrolled in our IDA program. And 1,800 people overall in our Portland Housing Center pipeline. Our AFI participants have a fantastic graduation rate, it's even higher than the state program alone, 70%. But that graduation rate is something that since I got here I've always been trying to improve because as we know we have limited resources for administration and so, just on a purely mission driven basis we want all of our participants to enter program to be able to graduate. And from administrative point of view it's also more costly, in terms of the administration to have people constantly dropping out and rejoining the program. So 70 percent graduation rate for AFI clients is probably determined in part by just their tenacity of character before even joining the program but were proud of that, and if you want to jump to the next slide I'll just show the place on our website where we have...we make sure that we always have accessibility of links when your using social media of course more often and the more prevalent you can include opportunities to connect and join people may be looking for it at the top of the page, they may be looking for it at the bottom of the page.

If you jump to the next slide also, I'll show the bottom of the very same webpage. Our webpage in the background, you see there and this is the bottom of the very same webpage where we include a currently not busy this picture was taken over the Labor Day weekend. So there has bent in a recent Facebook post, or PHC Tweets. Today for example, there would already be a Facebook feed there, and PHC Tweet feed there, just to constantly provide access to these resources.

So on the next slide, just bringing up some of the challenges and opportunities some of which that have already been mentioned. But there is a need to be familiar with social media, before you embark on the, before you try to use the opportunity that is presents you really need to be familiar with the social

media. And provide frequent opportunities to clients to connect. And some people are going to connect and some are going to like it. They're going to love it, but some people never will and to us at least the Portland Housing Center, were just trying to reach the people who are open to using it. And it's not going to be for everyone and we accept that.

So that's our Facebook page, and then if you jump to the next slide excuse me that was our webpage. It gives links to our social media. This is our Facebook page. So there a couple of things if you switch to then next slide, it will show you we have had 1,400 people like us. And the next slide after that, we provide a link where people can sign up for our services. So that's important too, we've had let me look at the stats that I have here for our clicks. We have an average number of clicks per post on our Facebook feed of about 13. Some of those shoot up to 100, some of them never have clicks. We try and see what content people are reacting to and share more of that content. We have occasional conversions of people who visit our Facebook page and then end up as clients signing up for the first time at Portland Housing Center and then we our Facebook page is also, actually all of our social media sites are for past clients, for present clients, and for people who maybe future clients. So in terms of usage it's probably most being used during the saving process, but certainly even post purchase, and also for an attracting client as well.

So, we've had 1,168 websites visits generated from our Facebook page. We have run some ads on Facebook. And certainly that's led to some of the clicks that we received through our webpage. Unfortunately, we can't tell if it comes from an ad or from our page. Or at least I didn't get out that data from our Communication Specialist.

But so, I guess I'll move on to the next slide which will be on Twitter. We get less engagement on Twitter, Facebook is by far our most popular social media tool. And I think that's just a factor of Facebook being the most popular social media tool used in the general populous right now. But we do still get some engagements. wW've had 6,200 impressions on Twitter, and impression is when your linked this is for LinkedIn. Sorry I just noticed that this screen is for LinkedIn. I'll just give you some information on Twitter, guess there not a slide on that one. We have had 6,200 impressions, which means that our Twitter Tweets made it to 6,200 people's feed across 6,200 screens. We've only, sorry. And that was in the months of January through April. So that was the first quarter of this year. We got 32 clicks in a quarter, a few likes, and a few retweets and replies. Not a lot of engagement but some of it, some of the Tweets that we post our automated and so we've gotten it to a point where it does not take a lot of administrative time to keep a constant feed of Tweets running through. So were keeping the Twitter page up for now, I'll talk a little more about automation if people have questions about that later.

And the LinkedIn page is the most recent. That's the one on the screen. That's our most recent addition, and this the LinkedIn page is the one that is specifically for IDA's. I started this two weeks ago. We currently have 27 members, probably new members every day, or at least certainly every week, and this I wanted to the support group where because we're working home ownership, people earnings, earning potential often very important. I wanted to be able to share articles not only about home ownership but about networking with other concurrent IDA participants in the area. Sharing ideas on increasing earning potential. Sharing their stories where they're at in their home buying journey and just in general to have more connected network of past and present IDA participants. So that's kind of a summary of where were at in terms of our social media and I'm open to hear any questions.

Chris: Alright, thanks so much Kate. I will just kind of open it up to folks for specific questions that they would want to ask of Kate right now. And I might just ask a question or two while you all are thinking about that about that. That was really interesting how you ended there. It's always interesting kind of these different social media channels and the options that we have for we how we can use them. And you've chosen your LinkedIn group to make that specific IDA group, but also make that a place to have more resources for earning potential and things like that. I'm just curious with the group of people that you're working with are a lot of them would this be their first crack on LinkedIn? Or are you finding that a lot of them are already involved with LinkedIn?

Kate: So one of the reasons, ah that's a great question. And one of the reasons, I started group was because I had a professional account on LinkedIn and I was finding invitations from a lot of participants to connect. And also a lot of invitations on Facebook to connect. And where Facebook for me, is a more personal use, I figured LinkedIn, would be a great place for me to connect with my participants on a professional basis.

Chris: Yup.

Kate: And so the group sounded like a great idea. Where we could all kind of chat about what is important to us and be connected and then we've had a couple networking events for IDA participants to connect to each other in person. But it's always so difficult to get people, for people to have room in their schedule to come to an event like that so this at least gives us a digital space to connect with each other.

Chris: Well I think that's to me, that sounds like a great example of how your kind of tailor the purpose you have in mind to the particular social media channel that you're looking to use. It strikes me, I mentioned my interest in behavior psychology strikes me that somebody might even finding out about that the group they might actually start a LinkedIn account and that might actually be beneficial for their professional growth if they learn how to use LinkedIn and get up some of their resume on there so that seems like your kind of killing a couple of birds with one stone there.

Kate: Right and that was kind of my hope in that, some of the articles that I post, in our group are about how to most effectively use LinkedIn, it's not the only thing I post. Or I will also use people that already use LinkedIn, I just try to throw those into the mix and articles about resumes and what not. So yeah, my idea with the LinkedIn group is to see how it goes, if it doesn't go over well, I can try a Facebook Group. But I'm going to give this a go for maybe at least six months and see what kind of engagement that I can get.

Chris: Yeah. Great. And then you mentioned the Twitter, I thought that was interesting. What you shared, your kind of mentioned the fact that you had kind of limited engagement with that but you also found, you also got strategies for limiting the amount time investment you put in to that and I would imagine that across the board one of the challenges you face is how much time do you put into a particular channel or driving a particular outcome. Does that sound like kind of a struggle that you work with?

Kate: Definitely, I mean we are all working at nonprofits, right. So we have limited resources and limited amounts of time, were all trying to do everything. Two key apps or rather two key tools that are key for managing these social media outlets is one is Feedly.com. Feedly.com allows you to manage, I don't

know if you have heard of RSS feeds, so let's say the Washington Post or Nerd wallet some website that you enjoy and appreciate their content will have an RSS feed, that you could subscribe to and if you have an RSS feed manager like Feedly then it will categorize those for you. And give you an easy preview of let's say the twenty different websites that you follow and what new news or new post have been published by the twenty different sites that you might want to share with your clients.

Chris: Yeah.

Kate: So you go to Feedly, you can see a quick overview instead of having to go through twenty different websites and sort through different articles. You go to Feedly and you can at least the headlines and see oh, this looks good. Click on it, read it and never suggest posting anything that you don't read through, because you never know if it aligns to the principles of your organization. So definitely always, always read articles, before you re-post them.

Chris: Right.

Kate: But you can go to Feedly just have much quicker access to a lot of content than visiting separate web pages.

Chris: Yeah. Great.

Kate: Another key feature since you are mentioning the Tweets, you can if you are a Twitter ad user which we happen to be, and I'm sorry that I'm not up to date on what the costs are to be ad user. But you can schedule your Tweets, so Monday I can go in, or the Communication Specialist can go in, and take ten different articles from our Feedly RSS feed, from our newsfeed. And set up ten different times for those Tweets to be sent during the week. So instead of constantly having to be on Twitter and constantly remembering to Tweet to your page and to your group you can set up ahead of time, which is super key. And you can do the same on Facebook also.

Chris: Ok. There is a question coming in from Patricia Ross. And she was asking, just how often do you do your updates? And also do you have someone who does your social media?

Kate: So, we are staff of about 15 people. So we're one of those organizations where everyone has about five different jobs. And yes, we do have a Communications Specialist. She's the one who's in charge of our Facebook, and our Twitter feeds. And she's the one responsible for going in there on a weekly basis and setting up the schedules for both Facebook and Twitter. Like I said, it doesn't take her that much time with the Feedly link and with the schedule Tweets and scheduled Facebook posts.

Chris: Yeah.

Kate: But that's the same person who's responsible for our Newsletter, yeah our Communication Specialist.

Chris: Yeah. It sounds like, I mean, in terms of productivity language, sounds like you really use batching in order to kind of get the most bang for your buck by just condensed period where you set it all up for the week.

Kate: Correct. I'm the one managing the LinkedIn page with my IDA clients. And that's been more hands on as I learn the ropes and also I want to be more connected to see what is, what's the action daily who's like what. And what content is getting appreciated and if people are leaving comments or

anything like that. It's been difficult to get comments so I'm trying different ways to drag those out of people. But yeah I've been managing that one personally.

Chris: Ok. Well.

Megan: Chris I just have a couple of questions. Guys this is Megan I have just a couple questions very quickly. And then we can move on to Alex. I'm curious, Kate it seems like you're using social media kind of as a way more for the like engagement, sort of like continual engagement of the folks that are interacting with you guys in a variety of ways and possibly also as a IDA clients. So, do you find or do you track sort of people who come to you and have questions and found you through social media? Like is there something in your enrollment sheet that says that I heard about you through a Facebook post or Tweet or anything like that or people coming through those strangers do you guy's sort of virtually coming through those channels and saying, hey I just saw this Facebook ad and I'm curious about X, Y, Z?

Kate: Yeah. There is a space on our application for people to note that down. And I would definitely say that tracking the data, on all of these social media outlets is essential to figuring out how and when to target and to reach people. We've for example only have three conversions from our web, from our Facebook feed. For example, three people, who have seen our Facebook feed, clicked on the link to our page and then directly became clients. But we have a space on our application where people can write that in and we had much many more people write it that they were referred to us from Facebook. I don't have the numbers on those right now, but it is important to not only track using Google Analytics, or Facebook Analytics, but also to have that just ability to write-in on an application that they heard about you through social media so that you can understand the usefulness of the tool and then can give a cost benefit, is it worth your time to continue using these? Does that make sense?

Chris: Yeah.

Megan: Yes, that's great thank you.

Chris: I think probably there will be more questions that will come up here, but maybe for the time being we'll turn it on over to Alex Moore to hear more about how their doing things at Community Works and I think again will open back up into a time where were both of you, Alex and Kate, can kind of respond some to several questions going forward. So Alex take it away.

Alex: Ok great. Thank you. Can everybody hear me ok?

Chris: Yes. Great ok.

Alex: Ok perfect alright. Well, thank you for having me. And I hope I can answer some questions. I was sitting here like listening to Kate speak and thinking wow, yeah this is great. I do know some of this stuff (Laughs) and hopefully, can provide some helpful feedback.

But, Community Works is a CDFI, Community Development Financial Institution. And we started in 2008, as a Housing Trusts Fund. And I should preface, we're based in Greenville, South Carolina. And a really, affordable housing was our focus when we got started and because Greenville is a place that's growing tremendously. And affordable housing is kind of one of those things that, not necessarily getting left behind but we needed to pay attention to. So then in 2010, actually 2012 we actually became a CDFI and got our CDFI by certification. But we had an IDA program since 2010. And then sort of in that time between 2008, 2010, 2012 along that path we really expanded our focus from initially being affordable

housing to now really all-encompassing financial stability. And what I mean, by that is that we have a number of programs and services, the IDA being one of them, all focused on making the Greenville community as well as individual families and even business owners more financially stable. So we have a number of different products, program, services, and with that a number of audiences.

So, just to give a little bit of background on myself, I have been here since 2012. And, I have done our marketing and outreach since being here, the entire time. I been asking people, how they've been hearing about us for a while now, so I feel like I've gotten pretty good feedback there, but I've also served a number of other roles and I'm one of our Financial Coaches. We have a couple of loan programs so I've been a Loan Officer, so kind of been all of the different elements of the organization. But the whole time, I've been doing marketing, social media, our websites, as well as events and community outreach.

So I can get the next slide? Thank you. So, with the IDA and Facebook specifically has really been a game of trial and error. We did not have really any Facebook presence at all until I got here. And I was just sort of the youngest person. And so they just sort of said, here we need a Facebook. And which was fine with me, and it really has been a journey since 2012 in the four years I've been doing this and a lot for trial and error. We have tried boosted posts. But you'll see right there, I really don't think that they work. And I'll just jump into the lessons learned, we've done a little bit of everything with Facebook and again, trial and error, including: boosted posts, recruitment posts, I was really interested in seeing the poll at the beginning about what everybody is using social media for at this point. Kind of done, all of that, at every stage.

So here, so my lessons learned and I've been on a number of webinars myself. Sort of on the either end of this, so I've had a number of take a ways, so I'll try to share a few of those with you guys today. The first thing is it is all about the audience and who is really using Facebook, and how are they engaging with you. And again, for us we recognize that we have a number of programs and services, we are appearing in Greenville, but we actually have some programs that are state wide. So it's, a huge challenge. We have funders, stakeholders, clients, and service users but also the community at large and I think that the challenge is always how do you communicate to all of those in kind of one place. And the lesson learned there is that every post should be for the followers of your page. Not for you, for your organization, not what your necessarily engaged in, but what are the followers of your page going to engage with or pay attention to.

Thinking along those lines, why are they on Facebook? So why are you on Facebook? Right. Kate says that she uses Facebook for personal reasons, well I'm exactly the same way and I understand that maybe some people don't have Facebook, don't have LinkedIn, don't have any sort of social media presence, but your kind of have to just put yourself in somebody's shoes who would. And think about, for me I use Facebook to find out what's going on in the community, just learning about news, seeing what my friends are involved with, and just kind of generally keeping up with what's going on. But me personally, and I think this is true for the majority of Facebook users, I am not there to find services or find help. I'm just, it's social. It's social media. It's a very social element.

So kind of an along those lines, then sort of the same thing we found that they aren't really great for recruiting users. Again, service users, people that we want to enroll in IDA. It again, people just that's not why they're there in the first place, generally speaking. And so, it, we haven't found a ton of success in getting true enrollment numbers from social media. And when Megan called and asked me about my

input on social media. I was like, that conclusion sounds very negative. Are you sure you want me on this webinar? (Laughs) But I want to just kind of hit a couple more points and then I'll move on. Again, the four, a few big conclusions that I came to were: Facebook is really not for users of programs and services. I mean it can be, by all means, but you're just not going to get the traction that you can get, I think in other areas. So, I was, again really interested to see that 77% of people on this webinar are using it for recruitment. And again, I think that's absolute a valid used for social media, we just have not seen a ton of success with it.

The other thing that I wanted to say and I can't emphasize this enough is that there's no magic bullet when it comes to social media. I will say it again. There is no magic bullet. I think people who do struggle with social media and have these challenges are looking sometimes, were looking for that social media strategy. And I've heard that a lot. Social Media Strategy. And you absolutely have to have one. Again, I think Kate really talked a lot about the sort of things that you do need to do. You need have someone who's savvy about it. But again, there's just no magic social media strategy that's going to accomplish a 100% of the things that you want to accomplish.

And then the last thing on this slide I would say, quality over quantity. So we talked about, we already touched on Twitter, LinkedIn, Facebook, and I won't even go to Pinterest and Instagram but really I'll just be honest, we at Community Works, we kind of let our Twitter quote unquote "let it go". We use Facebook, and we use LinkedIn. But as again, Kate hinted that really it's not hugely, Twitter has not been hugely successful in the areas, sort of like we felt like we just had to have it. You know, social media, got to Facebook, got to have Twitter. But really I truly believe you don't whatever its gonna work for you, what's going to work for your organization. And again, quality over quantity of networks.

Alright, next slide. Ok, so with that bomb, what do you we use to find our IDA clients? These have been the tried and true ways that people have found us. Again in the four years that I've been doing this, we have been really lucky in creating a referral network that is really strong. And I think it makes sense because when people hear about the IDA program, they have this sense of that's too good to be true. It's really an amazing program. And that can actually be a challenge sometimes, we have people who have heard about it but don't believe us. When we tell them what it entails. But we've created our referral network and gotten partners engaged in a way that they know what the program is about and what it's really designed for, and they communicate that to their clients, their partners, their customers, I mean you'll see on there mortgage lenders are one of our big referrals because our IDA can be used for down payment assistance. That's one big win/win. There's a small business lender, again we work with small businesses they could use IDA funds, so when we have banks and credit unions that are out there doing small business lending, if someone doesn't qualify they send them to us for IDA. So it kind of match made in heaven. So I think finding those referral network partners is so key. And again I mentioned earlier, like I've been asking people where they heard about us for four years and the number one response is so and so referred me. And it's another institution, another non-profit, things like that. I have another nonprofit on there, Habitat for Humanity is, everybody comes and knows about and they do home ownership. So again, perfect match made in heaven. They know all about our IDA program and we partner with them heavily and have I'm not exactly sure what percent of our current IDA pipeline is all Habitat for Humanity, a client. That's just a few resources.

Again, I felt like when I was asked to do this, I'm like ok, social media maybe not so successful for recruiting IDA clients, so I needed to give what we have used and what has worked. And then the next

thing I have on here, is grass roots marketing. And what I mean by that, is I mean really exactly what it sounds like. We have found that word of mouth and just being in front of people, is for our clients and our community here the most successful way to get people to...And again, to have the trust, too good to be true, so I don't trust it. And as well as, just the way that our clients communicate and the way they get in touch with people. You know, they come, they just come by the office sometimes. They're not always going to be social media savvy. And it's not 100% of our clients. And not to mention, IDA is a low income program, right? And so low-income not everybody has access to a computer or Internet in the first place, so Community Events, Resource Fairs, Neighborhood Meetings, the monthly meeting of whatever neighborhood. Like we go to those as much as we can. And its varies, certain seasons are more popular. There all kinds of small festivals coming up right now, so we have like the next few weekends are booked to go to things like that.

So next slide. Alright, so what do we use Facebook for? Again, feeling like I need some help. And I put these photos here because this is what we do on Facebook, and time and time again, has been so successful is showing the stories, and showing the results of IDA program, and showing the faces. I think that nothing engages people better on social media, because its social, than people and their stories. So we have prioritized collecting success stories for again, pretty much since I've been here. And I do want to point out, these two pictures down in the lower left hand corner, that say and I hope you guys can see it. It says, "I'm saving for" that's actually, I had never thought about it, until the poll today, could be used during times of saving and at enrollment. So for a long time, we each had a policy of when they come to open the account, or when they come to actually sign the document to enroll in the program officially, we have them take this little piece of paper and write it on what is that their saving for, and we take a quick little picture. It could be on somebody's smart phone, it's just two second thing, but and we've had so much great engagement form that, and also really cool for the client themselves to really connect to that goal that there's saving it for and it may not always, it may be something like I'm saving my child's future. I'm always interested and surprised by the creative things that we see on those, you would think that they would be repetitive, but they're really not because everybody has their own personal goal. And what they're going to use the IDA program for, and that is an idea I do have to give props Americasaves.org which I'm not sure if anybody is familiar with but amazing resources and tools on saving and how to save and ways to connect to savings, they actually do monthly text messages totally free. And again its AmericanSave.org and that's been a great resource for us as an organization and our users.

Alright so what we do use Facebook for? Again success stories I mentioned, that is number one-person first and foremost that everybody connects with but, you know it can't be just success stories. And not also, we don't have the man power to kind of elect enough success stories to really fill the Facebook feed. So other things that we really try to focus on are articles, news that pertains to making the case for why our programs are necessary, and raising awareness, so those are more communicating to the community at large, stakeholders. And the other thing about Facebook that we try to do is it's a lot about branding and just letting people know what your organization is about. So those sort of articles and news and tell the story of why we're here. In the next report and data, kind of the same thing. But it really important to do it in a compelling digestible format, like info-graphics, and a lot of news outlets, and people that are doing this sort of reports are getting great about providing info-graphics, because they want you to share the data. But if you just put a statistic, you know—"64% of South Carolina's have subprime credit" on your Facebook feed, then you that as just text is not going to do very much. Images

again, pictures of people that's what people connect with. And I mentioned brand recognition again, were just trying to get the word about ourselves as an organization, we're still really relatively new. And I think just we don't have a lot of marketing dollars or advertising dollars, so people just legitimately don't know who we are, sometimes, and I think social media is one of the great ways that we can get that message out of who we are, what were about, and what we do. Yeah, so that's my slides, and I know that's a lot, but yeah any questions?

Chris: Yeah, thanks so much Alex for the presentation and sharing. I think I've asked myself as much what is social media not well suited for as I've asked what is it well suited for? So it's fascinating to hear some of your experiences in terms of what is reasonable to expect and what hasn't seemed to be reasonable to expect. Again, were going to open it up here for folks to ask questions. There's already one or two in and I've got a question or two myself. So, we'll go ahead and get started.

But one of the questions that came in was just have you seen different platforms working better for different audiences that you work with just in terms of age range, or any other kind of delineators, in terms of what platforms work best?

Alex: Sure. So Facebook, again it's hard because it seems like everybody is using Facebook to me. So we see all kind of other age ranges, well surprisingly enough of those are not I would say below maybe 20 or below years of age. I have a sister who's 16, and she thinks that Facebook is for old people. If your trying to engage high schoolers in the IDA program so they save for college or whatever I would say maybe not Facebook there because they are much more on Instagram. But we have certainly, we don't have an Instagram. But I think like it's about partnership so we have with local high schools that's how we're kind of reaching them. LinkedIn, I would say is again, it's professional network and so we do see sort of a little bit older crowd in that not necessarily just because that is where were engaging professionals again to grow that branding. And so like, we have done an initiative where we've gotten all of our board members kicking and screaming on going on LinkedIn. And then have them engage with our LinkedIn page as much as possible and just reminding them to share things. So because that is sort of the market that we see for LinkedIn, is again board members, other professionals in the industry, sort of share what we're doing, and connect in that way. So again, not necessarily, who were trying to provide services to.

Chris: Yeah. Yeah and you had mentioned that earlier in the presentation is that it sounds like your experiences has been that social media has been more effective tool kind of for engaging stakeholders than it has been for engaging savers.

Alex: Exactly. Exactly. Stakeholders and the community at large. I think, I actually rarely see clients that I know, clients engaging with our stuff nearly as frequently at least.

Chris: Yeah. Yeah. Interesting. So, you mentioned the shift over to really focusing on pictures and success stories on Facebook and one of the questions that came in is just what types of responses have you received after making those Facebook picture posts and success stories?

Alex: Sure. It ranges, time of day post and all of those best practices. It ranges but when we get, when we post success stories we normally get at least, gosh, it's so hard to say because it changes so much. But we can get upwards of 2,000 people impressions, not necessarily the people that are engaged with but people that saw it if the right person shared that post. And we do have one or two typically share it which is great and that's when you really getting engagement, when people share what you're doing.

Because otherwise the only people that already follow you are going to see it. And one thing to say about that is just because somebody follows you doesn't mean they're going to see it. Facebook has all these crazy algorithms of who gets to see what. But just because you have 1,000 follows doesn't mean that post is going to be seen by 1,000 people.

Chris: Right yeah. Right.

Alex: Yeah. But and then and just to finish to answer your question, the one great thing is that and Facebook will notify you when you have a post that performs extremely well. So I manager our Facebook and I get all of the notifications on my phone, because I'm, I don't know obsessive about it or something. But I get the notifications, 'this post is performing 90% better than previous posts or similar posts'. So, the reason I know that our success stories do well, is because always get that notification when it's the photo of a home buyer, or someone whose gone to college.

Chris: That makes sense. So, for you of course it sounds like some of the people have this idea of a direct outcome being maybe more people will enroll in the programs and you're seeing more kind of indirect successes in terms of people getting motivated, excited about the work that you're doing, which may, further down the road, actually feed some of your IDA accounts for this a bit of an indirect path for that.

Alex: Absolutely.

Chris: Yeah. And while invited, if there are any more specific questions for Alex before we move into more of general Q and A and conversation. Go ahead put that in. I would say Alex, you hinted that you said that you manage the Facebook presence. Do you pretty much handle all of your agencies social media channels? Or is that a more of a team involved in that effort there?

Alex: Yes, I managed all of it. I will say that it's intentional. I think it's great to have a collaborative, input as far getting variety of posts. However, you're going to have different levels of comfort with social media. And you're going to have people that if you are trying to make it... I have heard of organizations, where they make it mandatory, like 'you must submit this many Facebook posts per month', and I think that can work in terms of getting quantity. But getting quality, you're going to want to have single voice and someone who deals with it regularly. So that they know what has been posted, what needs to be posted coming up. And I actually manage our ... we have two, we have one for the nonprofit, CDFI. We also have a credit union as well, so I actually manage both of those. And again it's intentional because I think that clarity of voice and message and knowing what's going on, but the way that I engage the rest of the team is I frequently pester people. About hey, what do you have going on? Or you know, hey send me the events you're going to, things like that and you know, some people are great about getting in content to hey I saw this email, just wanted to past it on along to you... I'm basically the hub, I try to get everybody to send me their stuff.

Chris: Yeah. Well I mean, as you sure that kind of brings true to me, that's easy to have kind of scattered social media presence if there isn't some of kind of place that filters everything that goes through. And it seems like, you matched it as social and seems like you really are personalizing your organization's brand as you communicate social media and you don't want that to be confused brand or one where people aren't quite sure who you are, as you communicate.

Alex: Absolutely. And one, just one addition to that we did have a public relations firm that that we worked with for a while. So I did share it with them, in my place for about a year and then it was just a smooth transition back. But that's the only time, we really have more than one kind of in there.

Chris: And just out of curiosity, I apologize if I missed this. Is there one particular asset that you guys work with? Or are you guys working with all three allowable assets?

Alex: Oh yes. I meant to mention that. We do first time home buyers, small business, and secondary education.

Chris: Yeah.

Alex: Yup.

Chris: Yeah, great because that is one difference. Kate it sounds like you guys are much more focused in on the first time home ownership. And I'm just, it's interesting to me that it sounds like you've also had a little bit more, you've noticed more engagement from actual savers in your effort and I'm wondering if the assets, the particular assets itself might have an impact, we tend to see if it has more of a social media savvy group who's in that stage of life where their ready to buy their first home. Do either of you have any thoughts or comments on that?

Kate: Um, I mean we are only offering the home ownership IDA. And I don't think we've cracked the code as to exactly who it is that engages with us and why. I wish I had that answer for you, but I know that the more that we reach, the more feedback that we get. Yeah, I would say one thing I wanted to mention was the ability of Facebook to target your ads. If you're willing to pay \$100-200 dollars for a couple month's ads they have really amazing ability to highly target what group of people you want to reach with your ad. And that's a huge feature I would imagine for the people who are interested in reaching out and getting recruitment through Facebook. We don't use it much for recruitment, but the ads are by far the best tool that we have for recruitment. And for getting first clicks, first visits.

Chris: Great. Great. Well let me move on to at this point, I think this is general questions, general input that folks attending the webinar have or responses back, we certainly invite that, there's a number of questions already out here that I'm going to kind of ask back to Kate and Alex here. So one of the questions here is just, "How do you use social media to connect the general public with your client success stories? Do you recommend using things like Google Analytics or Kiss Metrics, to reach out to a larger audience and raise awareness of the organization?" So yeah, kind of what advice as you think about that question, what advice would you give people who are looking to use social media to really connect the general public with the work that their program is doing with clients?

Alex: I have a quick idea, thought about that. So again, I mentioned that we are heavily referral and network based. And again, Greenville has a great community of organizations and entities that work together and so just tagging those other organization that have something to do with that success story or with that whatever it is that you're sharing. So like for example if we had a business IDA client that just completed business IDA and was having their grand opening or something like that, then we could tag the Chamber of Commerce the Greenville Chamber of Commerce, because they're going to be a group of Chamber Member or something like that. Greenville also has a number of, has a really cool called Greenville Business Magazine and tagging them, I mean tagging both of them. So then it will go out to those entities hopefully be seen by those followers, because those are sort of general community

outlets. And so that way would not just your partner will not just get but also their followers. And so that's the one idea, is tagging anybody who could feasibly have something to do with that success story.

Chris: Yeah. Yeah.

Kate: Yeah. I think that's great input from Alex. And I would agree as well as connecting with absolutely everybody and anybody if they work in the same industry. If they are clients or former clients or previous clients, if they work in your same organization as you, or you met them at a conference. The important part of social networking is to have a huge network so that the more people who maybe incidentally like something you say, or comment on something you say, the more likely that everyone else is, to be able to see I mean all things being equally. Like Alex mentioned that uncomprehensive algorithm that people could use this to determine who's get to see what. But the more, everything else being equal, the more that someone else would be able to see what you've posted. I can't really speak very much to visibility outside of our client based, because that's not really, what we're using Facebook for except for the Facebook ads. I mean, our Facebook page is out there in case people wonder across it. But we feel people get exposure to our Facebook page, if they're not already clients. Either from current clients or from our Facebook ads, which you know at a 100-200\$ dollars depending on what organization you're working for we kind of see it as like a fail fast and fail cheap opportunity. Based on the response that we get from that ad in that period: who we target it to, what the message is. We can decide to tweak that message, tweak the audience, or send more of that message to more of that audience.

Chris: Yeah.

Kate: Yeah.

Alex: If I could actually, she reminded me of one thing. If I could just add one quick thing. When you, when she said internal, as an organization it sorts of sparked. I should totally mention that use your staff as well that is in engaging in social media, because that's a way to connect to people that maybe don't know who are. I don't expect that all my staff uses Facebook just for the sake of promoting the organization so that's not realistic. They're not going on, but maybe they will go on if I force them, but I like people to like me. So, but we like if we have an event that or something internal that we're doing even if it's a staff luncheon I'll post that on our page. And then I'm very selective about personally who I tag in things, but I'll post it as our page, our Community Work page the photo that has staff in it, and then I'll go to my personal page and you can tag people as a person. You can't tag people as a Page as a company, but you can tag people as a person, so if I'm friends with that person on Facebook, I tag them in it and it goes out to all of their people.

Chris: Yeah. Great. Well let me, this is a really good question here. That actually kind of plays right in to what were just talking about, so are there any privacy concerns or consideration if and when you are interacting with your participants on social media?

Kate: For example, in the example of sharing stories, which is where I could think most frequently of privacy concerns we definitely have everyone who shares their success story and photos to sign to waivers that they agree to have that shared on social media, but that's something that we would post without their agreement. I guess I would ask for a follow up... we wouldn't ask for any private information, we would give general information online and ask people if they wanted to have a more

private discussion to call us. But maybe that person who asked the question had something specific in mind, or maybe Alex some comments also to share.

Alex: I was just thinking about success stories as well, and exact same thing; we have a client service agreement that they sign as part of application actually regardless of if they finish the program. So, it's just part of their application document. That outside of that, yeah I don't know.

Chris: And would you say, I mean just to kind of broaden that question, are there any, any kind of even protocol, even beyond just you know legal, or confidentiality concerns, do you have any comments on kind of on protocol things in terms of how you engage with comments or even the tagging issue? Or there are times where you may not tag somebody? That's a fairly broad question. Does anyone, either one of you kind of have some quick feedback on that?

Alex: Go ahead. I can.

Kate: Go ahead.

Alex: Ok, alright, I'll dive in. I think we have a Community Works, again we've been doing it for four years. We still don't necessarily have formal policies and produces about social media. That doesn't mean that we don't follow them. It's kind of I'm the only person doing it, which is bad. We should have those but it's almost kind of common sense kind of thing. It's not a bad idea to have policies and procedures around that. In terms of like engaging with people on comments, even messaging actually, so if you're the Administrator of a page you can receive direct messages just like an email to that page so you do want to have some sort of guideline about if you receive a message you want to reply within this amount of time because if you don't engage with people on your social media that's kind of bad branding, bad messaging for output. And then in terms of comments, just our experience with it we don't have a lot of people that have ever huge like comment train. The most comments that we get are like on the success stories, like, 'Congratulations to the family we're so excited for you.' Or, if we do have something like an announcement or news people just say like congratulations. Comments are, it's actually hard to get people to comment. So it's not really a problem that we face.

Kate: I guess I could see that person, who asked the question perhaps thinking about social media bashing, which can happen on occasion. It has never happened to us. But I'm thinking about maybe what the person who asked the question is thinking. And all of the social media sites have sort of a recourse for if somebody is posted something inappropriate. Certainly it does take a person, who has their pulse on with going on your social media. But as Alex mentioned, comments are so in frequent. That's just a factor, that doesn't mean the people aren't paying attention to what you are saying, doesn't mean there not suing your articles. But comments are so in frequent that there pretty easy to keep track of if somebody were saying inappropriate then you could easily take that down or whatever procedure you need to do.

Chris: Yeah.

Kate: Or follow whatever procedure you need to do.

Chris: Absolutely. Well, that's really good feedback. It sounds like both of you have experienced comments to not be a real burden in terms of how you need to be responsive because there just aren't that many that resonates with our own usages social media. I'm curious and if people in the chat box

want to chime in. I'm just curious about that resonates with a lot of other people are experiencing as well, or if some people have found some really effective ways of generating kind of the comment level of engagements. And I suppose it depends what your purposes are, but I'll just invite if anyone wants to feedback in the chat box on that.

Kate: Right. And while their feedback on that, Chris. I'll add in, that LinkedIn, I know has a way for you when someone accepts your invitation to a group on LinkedIn, you can...the system can send them automatic email you can program what that email says. So I've used it to take a minute to introduce yourself to the group. Some people do, some people definitely don't, but it is worthwhile to use that. And then I would agree with Alex's comment that pictures and infographics lead to more clicks. And publishing during the day if we're talking about protocols as far as LinkedIn goes publishing during the work day is when people usually, most usually will use LinkedIn. Of course if it's Facebook, you can publish sometimes not during the day, when it will be more likely to be looking at it. But also asking questions in your post can be helpful for getting people to give you feedback. Once again, people aren't always going to answer your questions, but maybe at least have them thinking and you're more likely to get that response.

Chris: Great. Yeah, so another comment here just... And I'm kind of filtering through as I'm speaking here. But so do you guys do some work trying to get other organizations or people around you some of those referral partners possibly to whether it be through Twitter doing retweets or whether it be through Facebook sharing your posts. Is there kind of intentional strategy that you use there or whatever that you maybe let somebody know, 'hey we just posted this would you be willing to get on and share it?' Is that a strategy that you've used to kind of increase awareness ever?

Kate: Maybe not that specifically as far as post go. But I have included in the signature of my emails, a link to our LinkedIn group. And have you joined our LinkedIn Group? I sent out various emails to get people to join. Not as specific as at the post level but certainly when you meet people that's part of exchanging your information also saying, hey like us on Facebook. Or I just got this LinkedIn group started, if you want to take part.

Chris Yeah.

Alex: Yeah. And just to second that. I would say, we actually do share other pages' posts. And it's very informal. It's kind of everybody just sort of tries to help each other out. But I have had times where an organization, or partner, organization is trying to promote something specific and they'll just email, 'Hey Alex can you share this and the weeks leading up to the event?' And then events that we participate in, that just sort of understood that you're going to help promote it. And then actually there was an organization at one, it wasn't, again it was very informal, but a number of nonprofit and even a couple of for profits that were working in this industry, got together and said hey let's have, it doesn't have to be like a monthly meeting but let's meet one time and get everybody to follow each other's pages and then we'll create a Facebook group. And so we created a Facebook group of all of the people that do social media at all these different organizations. And we would post in that group what we had going on so that they could go back to their pages and post it because, the other challenge that some people had was just finding content to post. So it was like, hey we're partners this is easy made content let's just go and share and tag each other. I will say that the group didn't last very long because that's a challenge as well, whose doing it can change and that kind of thing, but it was a really great idea if you have people that were really committed seeing it succeed. And then as far as getting individuals to like our page, we

have done “like campaigns”. Quote unquote. Where if I’m at an event, I’ll have my bowl of candy like I would normally have and people would intently ask can I have a piece of candy, “Yes, if you go like our Facebook page.” And everybody has a smart phone, so they’ll show me do it, and they do it right there. So that’s.

Kate: Fantastic.

Alex: Yeah that’s been one thing. We try to have clients; in every person’s email signature our Facebook is in our email signature. So that’s just another way to try and keep the momentum going. And at a point we do have a steady stream of likes. I can pretty much bank on getting at least three to five new likes a week, that’s a high week, I would say at least one a week. When we’ve got a lot of content. We have a steady stream of likes. So that’s good.

Chris: Yeah. And that goes back to that whole book and study on the six degrees of separation. When you can get into another person’s network that just amplifies and really exponentially spreads your message so sounds like you’ve done some very intentional strategy, even if short lived, to do that and I know that we, in our organization are looking at a more strategic use of Facebook where will actually kind of give a pre-warning to Board Members that are particularly post is going to come out and at least a couple times of month actually feed the shares and even some comments on posts so the way that just kind of introduce more and engagement into our social media channels. So I think those are great, great comments.

I am very aware that we are approaching quickly our end to our 90 minutes, which is a shame because there’s just a lot of good information. And this is such a vast subject, but I wanted to make sure I responded, a question from early on somebody specifically was wondering how we use monthly text for savings for our clients. Just really briefly on that. We just send a monthly text for everybody who saved. It’s congratulating them for having saved in the previous month. If a person wasn’t able to save, we would send out a message, and say hey we noticed you weren’t able to put into savings last month. Is there anything we can help with? Reach out to your counselor...that type of thing. Yeah, I imagine in the follow up here, there are some questions that really jumped out of the page, that we were able to address. Those might be addressed in the future email. But I better give it back to Megan to wrap things up and thank you guys so much for your sharing. I think I probably speak for everybody in saying it’s very helpful to hear how our organizations are approaching social media, and I’ve think you’ve shared a lot of wisdom with us in terms of how to allocate our energy, and how to test things, and how to understand what may work and what may not work. So thank you so much to both of you.

Kate: Thank you

Alex: Thank you.

Megan: Yes, this is Megan. Really just a huge thanks to all of our presenters, Chris including you today. It was really great to hear your insights. I appreciate kind of getting on and having a candid conversation about this. I know that our attendees were a little quieter today, than usual and I think that’s because were really, I think everybody’s just looking for more information on this so this is constant conversation. CFED is always here and willing to kind of hear questions, facilitate conversations like this, dialogues of this nature. Share out any best practices that were reaching or promising practices that Grantees around the country are utilizing. I think the final thought that I was just kind of recommend

one of the, best ways and I'm sure you all know this, you are all the real experts here, one of the ways to find out how your savers want you to interact with them is to ask them. Right? So if you're thinking about embarking a social media strategy, something of that nature which pretty much everybody is. Not a bad idea to talk with the folks who currently serving and ask them kind of what makes the most sense. If you have a big college savings IDA program, get those students in there and say, what makes more sense for your Facebook or Instagram? And if we were use Instagram what would that look like? So definitely recommend that

But otherwise thank you so much I really appreciate every kind of everybody's engagement. And just wanted to recommend once again, the AFI Resource Center is there's resources for you. There's a calendar there for upcoming events. If you have specific questions about your program, check out the Help Desk, you can email or reach out to that phone number there, and otherwise thank you so much again. Thank you to our panelist today: Chris, Alex, and Kate. Really appreciate you being willing to jump on and do this, this is incredibly informative. And thanks to the audience and my wonderful colleagues Alicia who is currently in the room here, but thanks for putting this on. Alright have a great first day back after Labor Day. And a wonderful start to your September everybody and we'll talk to you all soon.

Chris: Thanks. Take care.

Alex: Thank you.

Kate: Thanks.