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Donor Relations 2.0: Using Web 2.0 to Connect with Donors

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Session #401: The Potential of Web 2.0 for Donor Development

Good morning.

I would like to begin by expressing my deep thanks to Jessica Lacher-Feldman, for her willingness to read this paper in my absence when I became unable to attend the conference in person. Please accept my deepest apologies for my lack of physical presence In Real Life (IRL). I hope that this paper will give you some pragmatic ideas for conducting donor relations virtually in a Web 2.0 environment.

The experience of assembling this panel is very much in keeping with its theme. I have never met any of my fellow panelists in person, but many of us are now Facebook friends after putting the session together. I'm hoping that we can manage to meet in person sometime, but in the meantime, it serves as a great example of how social networking in a Web 2.0 environment lends itself to library and archival activities, particularly when working with a particular user community that you have targeted. This panel targets librarians and archivists; I will be speaking later about targeting other donor communities.

I was asked to be a presenter on this panel because a colleague and fellow blogger (Kate Theimer of the ArchivesNext blog,) noted the topic proposal and thought I might have some suggestions as to topics, examples of 2.0 donor relations and possible speakers. I was working on my book, *Special Collections*

2.0, at the time, and blogging and twittering about it rather incessantly. (That book, co-authored with Beth Whittaker, was published by Libraries Unlimited in July). Kate put me in touch with Tara, and I sent Tara a list of ideas. One of them piqued her interest for the panel, and I was asked to present upon it as a panelist.

I learned two specific lessons from this particular web 2.0 experience. **Lesson number one**: Web 2.0 is all about do-it-yourself. If you come up with ideas for using 2.0 tools, you will likely be implementing them yourself. (Lesson 1a: be *especially* aware of this if you are the sort of person that tends to think out loud --as I am. Thinking out loud on my blog is what prompted the book proposal and, eventually, the invitation to participate on this panel).

Doing it yourself takes time. The bulk of the tools out there for social networking, sharing pictures and video, and blogging are specifically designed to be relatively easy to use, but there is still a bit of a learning curve. Recognize it, and plan for it. You will need to spend some time skimming the Web to find cheat sheets and tips, particularly as you wish to move past the more basic functionality of most sites. The bulk of these web 2.0 applications are hosted on remote servers, and don't require downloading or local systems support, but it's also a very good idea to check in with your systems folks if you are planning to do this, thus keeping them in the loop.

Lesson number two: my online presence -- how I represent myself on my blogs, on Twitter, on listservs and social networking sites-- directly shapes the public perception of me as a person and as a professional, and can lead to specific, real-life consequences,. This is nothing particularly new: those of us who have been subject to previous web site redesigns for “re-branding,” or arguments on closed library discussion listservs have seen this sort of thing before.

The difference now is that the community of users that access your self-representation is much larger and more active than it used to be. Web 2.0 users are not passive consumers of information; they are active participants in its creation, expecting the ability to tag, comment, reply, link, and forward at will. It is the act of *interacting* that keeps our users interested in our message, our materials, and our sites. Users may be drinking from the equivalent of a fire hose of information, but they are very practiced at taking small sips, and recommending particular hydrants and methods of sipping to their friends. In other words, people are far more likely to “re-tweet” something that you say on Twitter, share on Facebook, or post to your blog or Flickr account with a single click than they are to forward an email from a listserv, because all of those actions are built into their information streams as default options, requiring much less effort. Users connected to the person doing the forwarding are far more likely to trust that source as verifiable, “real” or “honest” *because it comes through someone that they actually know (or feel like they know)*.

Connecting through friends-of-friends and colleagues-of-colleagues happens much more quickly and further afield than it used to when we were strictly working solely with one-way communication for websites, and two way communication through email, phonecalls, or face-to-face discussions at conferences. While these methods of communication and networking have not gone away, they are now routinely augmented by social networking technologies. According to the survey that we completed while writing *Special Collections 2.0*, cultural heritage professionals already Twitter consistently at conferences; post status updates about events and exhibitions on Facebook, and blog about collections that they are processing using Blogger, WordPress, and LiveJournal, often posting images and videos about those materials to Flickr or YouTube. When we return to our home institutions from these conferences, we are “friending” each other as a way of staying in touch and continuing the conversation.

These online conversations are already well underway. The question is whether or not you (or your institution) wish to join in or create new conversations with colleagues, potential users, and donors, and if so, how to go about doing so in a way that will keep everyone sane and satisfied with the results.

Let me be clear: I’m *not* advocating that cultural heritage institutions go out and create a shadow presence on every social networking or web 2.0 content-sharing site and devote thousands of hours to monitoring them, to the detriment of our existing backlogs. I am merely suggesting that these technologies deserve some consideration as to their usefulness to our professional and institutional lives, both as cultural artifacts and as tools in our public relations arsenal.

As cultural memory organizations, we will ultimately be responsible for documenting them as part of the cultural record. Cultural heritage institutions do selection and appraisal as a matter of course. These texts, communities, and online documents of our cultural heritage are as worthy of undergoing the selection and appraisal process as any other cultural document; they should not be excluded from our processes merely because of their original format. The best way to understand the underlying structure of these formats, which will help us to document them, is to gain some first-hand knowledge of how they work by using them.

However, I do think it's important to recognize that not participating in these sites and communities is itself a choice, which has institutional consequences. It may sound rather Machiavellian, but keep in mind that choosing not to participate in these communities in some manner may also lead to judgments about your library or archive as an organization. Users may assume a lack of interest, initiative, or technological savvy on the part of libraries and archives that do not have some sort of socially-networked representation on the wider web outside of their institutional websites—assuming that they know of your existence at all.

As Cory Doctorow has said, "the problem is not piracy—it's obscurity."[1] While we may be content to toil in obscurity for a while, it is far easier to advocate for continued institutional funding when we can demonstrate the existence of a large user community that cares about the institution. These technologies present another way to build our institutional visibility, another way to tell our story, which is central to retaining and growing internal and external financial support for our programs. To be blunt: the more publicly visible we are, the more likely it is that we can sustain reasonable budgets because when cuts occur,

[1] Doctorow, Cory. "Why Publishing Should Send Fruit Baskets to Google". BoingBoing post, February 14, 2006. http://www.boingboing.net/2006/02/14/why-publishing-shoul.html

there is public outcry. A recent example of this is the Twitter and other social media campaign that helped to restore a massive funding cut for Ohio's public libraries.

From Theory to Practice: Lessons Learned

As a curator of rare books and special collections, I do selection, appraisal, acquisitions, public relations, and collection development as part of my job. In the past two years, I've found these tools to be extremely useful in my daily work. I should state for the record that my experience has mostly been in working with my contemporary collections, that is, working with authors, publishers, editors, and fans of science fiction and fantasy literature, which is one of our collecting focuses at Northern Illinois University. These, then, are the lessons that I have learned thus far in becoming a socially networked curator as a method of building my donor base.

Lesson 1: Web 2.0 is not just a fly-by-night trend that can be ignored. These Web 2.0 tools are quite well-established. Blogging has been around for fifteen years; Facebook and MySpace have been around for over five years each, and Flickr, YouTube, and Twitter are a few years old. These are, by cutting-edge technology standards, no longer "new technologies;" they are part of the information stream of everyday life for millions of people. Their popularity helps to ensure their continuation in some manner for the time being. If part of our charge as cultural heritage professionals is to reach out to our users, how effective are we, really, in doing so, if we aren't making our materials discoverable in the places where the largest number of potential users are most likely to be?

Lesson #2: Be interesting. Briefly and Consistently. Being interesting, quirky, and different (along with pictures of cute kittens) drives popularity and traffic on the social web. Luckily, cultural heritage professionals are often responsible for some of the most interesting, quirky, and different historical materials out there. Those of you that work on the front lines in archives know about the popularity of genealogical research, and amateur enthusiast historians in particular subject areas. The popularity of these materials is just as visible on the social web, if the reactions to projects like PhotosNormandie and the Library of Congress Flickr commons have been any indication. Content drives traffic; we should leverage our content as much as we possibly can, or our collections may be destined to be hidden no matter how well we use traditional methods to describe them.

One of the advantages of many of the social web tools is that they are designed for brevity. Facebook status updates, Twitter “tweets” and blog posts work very well for the exposure of collection items where we don’t need to say much more than “look at this! Isn’t it neat?” The onus is then on the intrigued users to comment, share, or follow that item of interest back to us, our services, and our deep, wonderful collections. Users that have a good experience using our materials remotely are more likely to think kindly of us in general, and to provide positive word-of-mouth to their online friends.

A key detail that must be understood when using these tools, however, is that there must be some effort expended to consistently post, because consistent content is how you remain viable and maintain the attention of your users. The quickest way to kill your social networking profile, Twitter account, or blog is to set it up and then never post any content. Also, pictures, whenever possible, are generally preferable to text alone.

Lesson #3: You don't have to do everything. But it's good to try something. Choose wisely.

There are only 24 hours in the day, and even librarians and archivists need to sleep sometime. There is no need to have a presence on every platform. In fact, it is far better to examine several options, and just pick one or two to focus on based on your goals for the platform (you should have some of those, too). If you want to showcase your historical photographic collections, then it makes more sense to open up a Flickr account than to post them one by one to Twitter. If your goal is to publicize your Friends group, perhaps an active Facebook page that sends your users event reminders might be best use of your time. It is far better to have a really good blog and an active Facebook page, but no Twitter or Flickr account, than to have all going at once, none of which gain new content because there just isn't time.

Lesson #4: Do what you say, say what you do.

The most popular sites are consistent in their policies and practices. It's a good idea to make your policies about posting, comments, or whom you will or will not "friend" or "follow" public. State your goals, and your aims, and then follow through. There is no rule that says all blogs and Twitter accounts must be “high-traffic.” I subscribe to plenty of blogs that only post once or twice a month, and Twitter streams that only post a few tweets per day. I still follow them because what they do post, however sporadically, is interesting, thoughtful, and worth reading (thus, worth waiting for). The key is to set user expectations ahead of time rather than managing them after the fact.

Lesson #4: Be Authentic.

This shouldn’t need stating, but I’m going begin with a Public Service Announcement for those who have never been on the Internet before: *If you wouldn’t stand by those words in person, don’t post them to the Internet.* Assume that everything you say is public. You never know who will be reading what you say, but you can be sure that at some point, someone will disagree with you. Accept disagreement with grace, and move on. Don’t waste your energies on internet “slapfights.” You have far better things to do with your time.

There are many different ways to interact with and use these tools. The key is to sit down and think about what you as a user, a person, and a professional are comfortable with, and to design your social networking presence to coincide with that. If you are not someone that relishes the idea of being a public figure, it is perfectly acceptable to let your institutional profile do the talking. If you are comfortable with being a public figure, be sure to keep track of your profile, and manage it carefully.

There are plenty of cultural heritage professionals that want to keep their work and private life separate, and do so by using one platform (such as LinkedIn) for professional use, and one (such as Facebook) for personal use. Many of us maintain multiple profiles on a single service (like Twitter), so that we don't have to mix following our favorite celebrities, baseball teams, or hobbies with our professional conversations.

It is also quite easy to maintain single profiles, but participate in separate conversations that need not mix. All of these platforms have privacy settings and ways of organizing disparate communities. As a result, it is rather easy to restrict family photos to family members only on Facebook, while still letting your professional colleagues see the pictures of you from SAA.

Ultimately, you are responsible for deciding how to represent yourself online, and how much of your life you would like to share. It is a deeply personal decision, and each of you must make it individually. Just know that whatever level of self-disclosure in this setting you choose, there are tools available to manage it.

In my case, I have chosen to self-disclose a bit more than others may have done, for a distinctly professional reason. As a curator that works very closely with currently writing authors in the SF community, I'm asking for them to donate their papers and archives. For this community, it's a matter of trust, and the decision to donate to my university or not is often a matter of whether or not they trust *me*.

Although there are a few large SF archives for whom this is not an issue, there is a long history of curators that have begun to build small SF collections at smaller institutions, and once the leadership changed, so did the direction of the archive, abandoning a handful of writers in a remote location. The authors that I work with want to be reassured that this won't happen to their materials. When they meet me and talk to me, they are interested in getting to know me, and one of the ways that they do that is by reading my blogs, looking at my Facebook profile, seeing what I read on GoodReads, and subscribing to my Twitter stream. What they learn is that I'm a relatively new, but active member of their community, with interests in both published SF literature and media fandom. I don't post anything that isn't true; I do choose to highlight those facets of my work and personal life that are most relevant to their interests, as a way of demonstrating that I am indeed part of their community.

We use these tools to continue building a relationship online that began in person. Rather than having lots of phone chats or emails back and forth (or spending a lot of money for travel), we play Scrabble on Facebook. We forward links of interest to one another on Twitter. I become part of their daily casual information stream, easily accessible to answer questions. I become, in essence their personal archivist/librarian, answering reference questions related to stories that they are writing (if a protagonist was going to steal a book, would this work in real life? Where are there underground rivers in Northern Illinois?), as well as functional questions about placing things in our archives (do you prefer RTF or Word documents? Do you want Copy Edited Manuscripts? Galley Proofs?

Review copies?). This information stream also helps me to keep track of things like when it's a good time to contact someone about their archival materials, and when it is not (when writers are under deadline, they say so publicly).

I comment on their blogs, and they comment on mine. I opened a LiveJournal account just for this purpose, which has since become my personal blog. Although I've maintained "Confessions of a Curator," my professional blog, for two years, where I talk about library-related issues, what it's like to be a curator, and muse about things like the Google Books Settlement, most of the authors that I am working with consistently follow me on LiveJournal, and don't interact with Confessions of a Curator at all. The authors are far more interested in getting to know me as a person than as a librarian/archivist.

My personal LiveJournal blog is much more about my personal life; I use it to blog about my family for relatives that live in other parts of the country, for instance, and to talk with other fans of the same television series that I watch. It is, nonetheless designed for public consumption. I do not use it as an actual online personal journal. I assume that anything that I post there is public, and act accordingly.

This means that on occasion, I do self-censor. If I read a book and didn't enjoy it, that negative review is unlikely to end up on my LiveJournal, because you never know when the author might see it, particularly if they are later approached for archiving (hey, just because it's not my cup of tea as a reader doesn't mean it's not worth documenting). Praise, however, for books that I enjoyed is always publicly shared. I’ve never known an author to be angry about a positive review.

Lesson 5: Assess, regroup, and sometimes, change or let go.

Of course, the biggest question we all have is whether learning all of this new technology is worth our time. In my case, the answer is a resounding yes. When I started approaching SF authors about their papers, I had not a single piece of archival materials in hand. Two authors donated papers after meeting me in person at conventions. Two years later, I have materials from thirty-three authors in hand. About twenty percent of these authors have not actually met me in real life, but know me by reputation, based upon my online social networking, and the fact that their friends know me. Using these tools, my network has gotten much bigger much faster than it might have if I was doing all of my networking in person or over the phone.

That’s only one assessment, however. Since I began doing this, I have made some adjustments to make my online work manageable. I use services such as Google Analytics, Technorati, and FeedBurner to periodically assess my professional blog. As a result, its focus has shifted, based upon my understanding of my actual readership (as opposed to whom I thought would be likely readers). I try to schedule time every week to write blog entries. If I have a good chunk of time, I will write more than one entry, and then schedule them to post on different days, keeping content flowing.

I do routinely check Facebook, Twitter, and LiveJournal throughout the day (these are some of the services that I use most heavily). I make a point of noticing which links get responses, which comments get forwarded and shared, which status updates and blog entries get the most traffic, or generate the most commentary (online and offline), and gear my blog entries, status updates and tweets towards those topics. Since I have chosen to do my outreach using these methods with my institution's blessing, I also make sure to note my social networking activities and their successes in my departmental annual reports and in my tenure file annual reports, to continue demonstrating their utility to my work.

I have learned that it's okay to let go. I don't really have to be present in every community, in every conversation. I have tried some services, and let them lapse because they don't fit my workflow well enough to continue using them. My FriendFeed and LinkedIn accounts are basically placeholders that were created for test-driving them for our book. My department does not yet have a Flickr stream or a YouTube channel. But you can pry my Delicious account out of my cold, dead hands.

I also try to purposely build non-internet time into my schedule, so that I have sustained time for thought and writing that isn't tied to these services. It's very easy to get lost in this stream of short pithy words, if you allow it to happen. Each of us must set our own boundaries for such things.

In conclusion, what I would like you to take away from this session is that just because social networking can be fun doesn't mean that it isn't work. And just because it's work doesn't mean that it can't be fun. If beating you at online Scrabble is what it takes to convince a donor that you're the right institution to host their legacy, who are we to argue?

Thank you.