



## Crafting a Social Media Strategy for Your Financial Aid Office

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### Learning Outcome

You will be able to craft a social media strategy for your financial aid office to improve customer service and communication with students

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### Let's Hear from You

How many of your aid offices currently use:

- Facebook?
- Twitter?
- YouTube?
- Other?

Or are you not there yet?

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## Why Are You Not There Yet?

- Time and resources?
- Open forum?
- FERPA?
- Value - is it worth it?

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## Reasons You Should Be There

Social media allows you to:

- Improve customer service with minimal resources
- Improve communications without loss of privacy
- Enhance your reputation
  - Change perception from being too rigid to being proactive and student oriented
- Improve student outcomes by communicating with students “where they are” and at critical times

With less time and resources than you might expect

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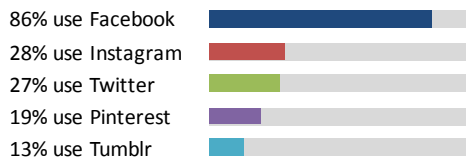
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## Young Adults and Social Media

According to a 2012 PEW Research Center study, among internet users ages 18-29:



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## Opportunities (and a few challenges) for Using Social Media in the Aid Office

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### Opportunities – Customer Service

*Meet your students where they are most comfortable and decrease lines and phone calls*

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### Opportunities – Customer Service



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## Opportunities – Social Proof

*Help your students in a public setting*

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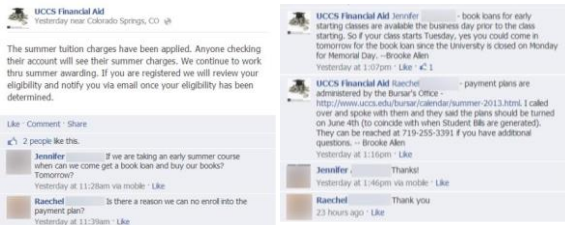
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## Opportunities – Social Proof



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## Opportunities – Timely Content

*Provide instant communications and meaningful topics*

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## Opportunities – Timely Content



**LMU Financial Aid**  
@LMUFinancialaid



Today is the last day to add/drop a class!  
Make sure you are considered full time for  
your LMU scholarships and grants. We're  
open till 6pm!

Reply Retweet Favorite More

10:05 AM - 30 Aug 13

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## Opportunities – Credibility and Loyalty

*Prove you are not just that  
“regulatory” person behind a desk*

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## Opportunities – Credibility and Loyalty



**UCSC Financial Aid**

It's been quite busy in our office for the past few weeks! We appreciate your patience! We are working hard to make sure everyone has their awards by no later than the end of next week =]. And with that, we hope everyone has a fantastic 3-Day weekend!

Like · Comment · Share · 24 · 4 · August 30 at 5:39pm · 🌐

24 people like this.

- cant wait to accept my financial  
Thank you for all the hard work 😊  
August 30 at 6:02pm · Like · #2 3
- UCSC Financial Aid** Thank you =)]  
August 30 at 6:02pm · Like
- Appreciate all the hard work! Have a restful  
weekend!  
August 30 at 9:16pm via mobile · Like · #2 1
- Danke schon! 😊  
See Translation  
August 30 at 10:38pm via mobile · Like · #2 1

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## Opportunities – Transparency and Access

*Communicate early and often  
in a public setting*

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## Opportunities – Transparency and Access



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## Opportunities – Financial Literacy

*Use it as an educational tool*

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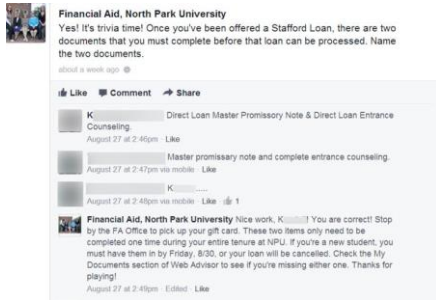
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## Opportunities – Financial Literacy



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## A Few Challenges

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## Challenges

- Resources



Time



Personnel



Experts

- Reality of public discourse
- People are talking about you whether you like it or not
- Inform but do not control

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## Challenges

### FERPA

- FERPA still matters on social media
  - It doesn't prohibit your office from interacting with students on social media
  - Some conversations should still be held privately
  - The distinction between office and student communication is important
  - FERPA issues should be addressed in your profile description

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## Challenges

### FERPA



We welcome your comments and hope that our conversations here will be polite. You are responsible for the content of your comments.

We do not discriminate against any views but **may delete any of the following:**

- Violent, obscene, profane, hateful, or racist comments
- Comments that threaten or harm the reputation of any person or organization
- Endorsements, advertisements, or solicitations of any kind
- Comments that suggest or encourage illegal activity
- Multiple off-topic posts or repetitive posts that are copied and pasted
- **Personal information including but not limited to e-mail addresses, telephone numbers, mailing addresses, or identification numbers**

In short: be nice and add to the discussion. If you continually violate this policy, we may limit your ability to comment in the future.

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## Challenges

### FERPA

The screenshot shows a Twitter thread. The first tweet is from MSU Financial Aid (@msufinaid) dated 29 Aug, stating they are live until 11am and answering financial aid questions. The second tweet is from a user named Jon (@Jon) replying to @msufinaid, saying he has a scholarship that hasn't dispersed yet. The third tweet is from MSU Financial Aid replying to @Jon, stating they need to look up his account to see why, due to privacy issues. Below the tweets are interaction icons for Hide conversation, Reply, Retweet, Favorite, and More. At the bottom, it says '9:33 AM - 29 Aug 13 · Details'.

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## Challenges

- Fan acquisition and building the momentum
  - Invite fans
  - Build momentum by posting useful, shareable content frequently and consistently
  - Once you build it, you have to work it – fans don't just show up



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## Challenges

- Content filtering and having a non-biased voice for the office
  - Public space
  - Not everything should be posted (even if it's interesting)
  - Posting policy should mirror your standard communications policy
    - Loans
    - Other school aid policies
    - Etc.

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## Strategy

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## Start With Your Goals

- Revert to your department’s mission and vision
- Consider how social media can support the work you’re already doing
- Remember, this is just a new tool to reach your customers, not a new departmental objective

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## Choose Your Platforms

Three questions

1. Why social media and what are the goals?
2. Who is the target demographic?
3. How will your customer service and interaction change as result of social media use?



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## Consider Your Editorial Policy

- Who will have administration rights to your accounts?
- Who creates content?
- Is there an approval process?
- Who monitors the conversation?

*Social media is a two-way street*

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## Content

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### Finding and Writing Effective Content

- Remember, you don't have to write everything from scratch!
- Repurpose what you can from other sources
- Think about how the audience receives your social media content
  - Short
  - Conversational voice

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### Finding Content

- Potential third party sources
  - Federal Student Aid (FSA)
  - Scholarship announcements
  - News outlets
  - Other aid offices and servicers on social media
- Curation is key!
  - Google Alerts
  - Google Reader

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## Effective Content

Content forms

- Blogs
- Facebook posts – standalone
- Facebook posts to introduce link
- Facebook photo captions
- Videos
- Tweets

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## Effective Content – Research

*What is your audience looking for and when do they want to know about it?*

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## Effective Content – Research



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## Effective Content – Research



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## Effective Content – Headlines and Killer Openings

- Headlines
  - Make them want to click on it!
- Killer Openings
  - Be exciting  
(Yes, even when the topic is financial aid)

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## Effective Content – Headlines



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## Effective Content – Killer Openings

### WAYS TO SIDE-STEP THE SHORTAGE OF FINANCIAL AID



Although nearly every college student wants a scholarship to help pay tuition, only about 50 percent of college students are expected to receive free money each year. But there are some steps students can take right now to improve their odds of being in the lucky 50 percent.

**Apply Early for Financial Aid:** It's wise to start applying for financial aid (both private and college/university grants) at least a year in advance. This gives you enough time to understand the terms and apply accordingly. In addition, due to the economy, competition for securing financial aid is increasing each year. Sometimes, some colleges and universities work on "first come first basis." You wouldn't want to miss out on the financial aid you need so badly just because you applied late.

**Scholarships, Financial Awards And Grants:** There's no shortage of scholarships, grants and financial awards given by private donors, colleges and universities. Unlike private student loans, these grants, awards and scholarships are not to be repaid. But remember, you should be eligible or your application will be rejected and it will be a wasted effort. Don't forget to check with colleges' financial aid office about their policy on third-party scholarships.

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## Effective Content – Tone

Use conversational tone



UAOSFA  
@UAOSFA



I like big SCHOLARSHIPS and I cannot lie.  
You other brothers can't deny. Apply and  
get... free money! [bit.ly/16NqtK6](http://bit.ly/16NqtK6)

Reply Retweet Favorite More

2

FAVORITES



4:01 PM - 28 Aug 13

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## Effective Content – Resource



### Bill Gatton College of Pharmacy Financial Aid

Back to the grindstone after a three-day weekend. Today's tips are for all the single ladies (and gentlemen):



### Money-management Tips For Singles

It is vital that single people practice common sense money-management skills just as much as a married couple. Here are some practical tips for your budget.

BY DAVE RAMSEY WEB SERVICES, MONEY, BUDGETING AND D...

on Tuesday

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## Effective Content – Short and to the Point

- Make your point quickly
  - Facebook cuts off posts and adds a “see more” link after five lines
- Use lists, bullets, numbers, and visuals
- Remove URLs or unrelated link descriptions
- Break up content over multiple posts

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## Effective Content – Multiple Posts

### Federal Stafford Loan Repayment Options – Pay As Your Earn Repayment

May 9, 2013 by Northeastern University Student Financial Services

#### Federal Stafford Loan Repayment Options – Pay As Your Earn Repayment

Just a reminder, this is the fifth blog in the series focusing on Stafford Loan Repayment. Last week we discussed the [Income-Based Repayment](#). This week we will talk about the Pay as Your Earn Repayment, which is very similar to last week's topic.

Borrowers who took out loans after 2009 and have a financial hardship are eligible to apply for this repayment plan. The monthly payments will be based on 10% of the borrower's discretionary income, which is the difference between the borrower's adjusted gross income and 150% of the federal poverty guideline. Similarly to the [Income-Based Repayment](#), the typical monthly payments will be lower than with the [Standard Repayment](#), and will not exceed the amount that a person would pay if they had chosen the [Standard Repayment](#) plan. After 20 years in repayment, any remaining principal or interest will be forgiven (borrowers

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## Effective Content – Multiple Posts

### Federal Stafford Loan Repayment Options – Income-Based Repayment

May 2, 2013 by Northeastern University Student Financial Services

We are continuing with our weekly blog series on Stafford Loan Repayment. Last week we discussed the [Income-Based Repayment](#) plan. This week we will focus on the [Extended Repayment](#) plan. This option is available to Stafford Loan borrowers whose total loan balance is higher than \$30,000. With this plan, the borrowers will pay off their Stafford Loan debt in 25 years by making either fixed or graduated payments throughout their repayment period. This is what the repayment may look like with fixed monthly payment amounts:

#### Federal Stafford Loan Repayment Options – Extended Repayment

April 25, 2013 by Northeastern University Student Financial Services

In the third installment of our series of blogs discussing Stafford Loan Repayment, we will focus on the [Extended Repayment](#) plan. This option is available to Stafford Loan borrowers whose total loan balance is higher than \$30,000. With this plan, the borrowers will pay off their Stafford Loan debt in 25 years by making either fixed or graduated payments throughout their repayment period. This is what the repayment may look like with fixed monthly payment amounts:

Loan Amount	Interest Rate	Number of Payments	Amount Each Month	Total Repaid Amount
\$45,000	6.8%	300	\$312.33	\$93,699.73

Alternatively, an [Extended Repayment](#) plan with graduated monthly payments would look like this:

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## Content Tips

- Learn how to write picture captions
- Give a quick synopsis
- Sound personal
- Avoid jargon

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## Content Tips

- Build the momentum
  - Create word of mouth
  - Use student employees to spread the word
  - Link to your page whenever you can
  - Connect all your online vehicles

Sincerely,  
Anyra Morozkina MBA, MS  
Assistant Director, Communications and Administration  
Northeastern University  
354 Richards Hall  
360 Huntington Avenue  
Boston, MA 02115



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## Content Creation

Let's practice!

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**You Want to Say:**

“The Financial Aid Office will notify students who are coded non-compliant with the SAP Policy after grades are posted for the spring 2014 semester.”

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**You Could Say:**

“Did you know that federal rules require you to complete 67% of your attempted credits and maintain a satisfactory GPA to remain eligible for financial aid? If you’re struggling to pass a course, here are some campus resources you can use to get help:”

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**You Want to Say:**

“The Office of Student Financial Services is required by federal statute to recalculate federal financial aid eligibility for students who withdraw, drop out, are dismissed, or take a leave of absence prior to completing 60 percent of the term. Recalculation is based on the percentage of earned aid using the Federal Return of Title IV funds formula.”

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### Suggestions from the Audience:

What are some better ways to communicate about R2T4 regulations in the social media space?

Please use the chat box to post your responses



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### You Want to Say:

“If an applicant selected for verification has not successfully transferred information from the IRS, or did transfer the information but then changed it, the Department expects the institution to require the applicant, and if necessary the applicant's parents, to provide an official IRS transcript of their Federal income tax information.”

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### Suggestions from the Audience:

What are some better ways to communicate verification requirements in the social media space?

Please use the chat box to post your responses



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## How Often Should You Post and When?

As a general rule:

- Facebook: three to five times a week (two times a day is fine if you have an important announcement)
- Twitter: one to three times a day
- Blog: once a week

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## Planning Your Communications Calendar

- Look at current communication pieces (newsletters, handouts, presentations)
- Know what MUST be posted during certain time periods
- Plan for some “filler” to encourage student interaction
- Start searching now for third party content you can use at a later date

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## Monitoring the Conversation

- Make use of notifications
  - Email
  - Mobile Apps
- Respond timely
- Know that sometimes, a “like” is enough

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## What About Negative Comments?

- Keep in mind that negative comments are not always a bad thing
- Take the high road
- Be honest
- Contact the person directly
- Feel free to delete if:
  - Your staff or community is threatened
  - Profanity is used
  - Statements are blatantly false



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## What About Negative Comments?



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## What About Negative Comments?



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## A Note About Assessment

You'll be asked to provide data about your progress

- Facebook Insights
- Analytics
- Anecdotes

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## Assessment – Facebook Insights



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## In Summary

- Align your strategy with your mission
- Choose your platforms wisely
- Embrace the "rules of the road"
- Have a plan
- Learn how to create and curate content for social media
- Assess your results using both hard data and anecdotes
- Don't be afraid to experiment!

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# Additional Social Media Resources

### Basic How-To

- [Facebook Timeline Page Layout Guide](#)
- [Social Media Sizing Cheat Sheet](#)
- [A Student Affairs Social Media Plan](#)
- [One Simple Way To Improve Your Content](#)
- [Sharing on Facebook](#)
- [Set Up Your YouTube Videos for Success](#)
- [Guidelines for Facebook Cover Images & Text](#)

### Developing Content

- [Resources from FSA](#)
- [3 Easy Steps to Finding Great Content](#)
- [Set a Posting Schedule That Encourages Shares & Pageviews](#)

### For Review & Discussion

- [Stop Using FERPA as a Social Media Banhammer](#)
- [Student Affairs Live: Legal Perspective of Social Media Use on College Campuses](#)
- [Missouri Baptist University FAFSA Video](#)
- [Utah Higher Education Authority's High School Film Festival Submissions](#)
- [Customer Service Is Going Social](#)
- [Leveraging Social Media to Drive Awareness & Increase Engagement with Students](#) - presentation from the FSA new media team at the 2012 FSA Conference.

Great Lakes is including this third party content related to social media planning and implementation to provide some follow-up resources for you. Inclusion in this list does not imply endorsement of the material or guarantee the accuracy of information presented.

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**Thanks for Attending**