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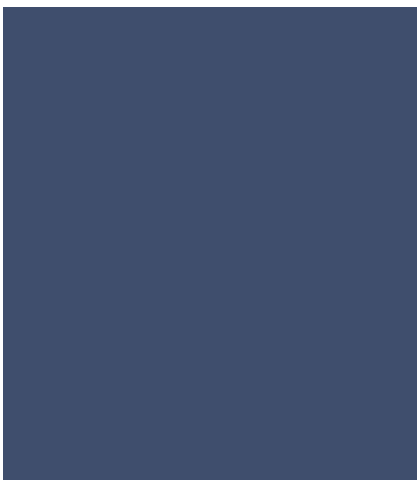
# Get Social, Get Results

## *Using Social Media Tools in a Collaborative Grant-Producing Environment*

A whitepaper prepared by

**In4Grants™**

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# Get social, get results

How can institutions that rely on government grant or foundation funding put social media concepts to work for them?

One of the greatest challenges universities and nonprofits face in securing grants is getting everyone on the same page in the grant-seeking process. It can be hard enough within an organization to get researchers, grant managers and techies to synthesize on grants; adding in all those layers from an entirely different organization compounds the challenge even further. Throw in unanswered email and it's a wonder any grants are ever distributed.

But with each passing year the world becomes more connected, and workforces are increasingly populated with young people who don't remember a world without cell phones and the Internet. Their world is always connected to friends, family and information, at their fingertips, all the time.

That social networking model can knock down the barriers that face grant seekers by streamlining information, simplifying the communications process and facilitating increasingly critical collaboration. This whitepaper explains how organizations can learn valuable lessons about applying the principles of social networking to make collaboration in grant-seeking simpler and more effective.

All poll data is based on a **March** 2011 interactive webinar among 84 representatives of grant-seeking organizations and software company InfoReady Corp.

## The Class of 2010

The business world is welcoming an influx of young go-getters from the Class of 2010, the vanguard of a new generation of employees who do not remember a world without cell phones, the Internet and social media. To them, life is a minute-by-minute exchange of information and ideas that never stops flowing through social media sites like Twitter, YouTube and Facebook. Connected? Always.

They aren't the only ones. The entire workforce now use PCs and other electronic devices for non-work activities more than they do for work, and much of that time is spent on the Internet, visiting social media sites like Facebook and Twitter, and using social networking tools.

But the Class of 2010 marks a different world, where challenge and discovery are as natural as a text message. Have you ever watched a 22-year-old self-learn PowerPoint? It's click, click, click until they learn what works, what doesn't, and gain mastery. That's challenge and discovery, and for some of us who joined the workforce 10+ years ago, it's a lesson we're still learning. But it's second nature to the people joining the workforce today, and that's a fundamental reason why social media are so powerful. As long as nothing breaks, they keep clicking. The more they click, the more they learn and communicate.

Though inroads have been made, the workplace culture hasn't caught up. Those connected young people are moving into workplaces and finding a culture that does not necessarily welcome the social media mentality: A 2010 survey by Cisco revealed that more than half of IT decision-makers still ban the use of social media applications in the workplace. ("Bracing for the Class of 2010," Andy McLoughlin)

Get  
Social  
Media  
Working



# So what, exactly, are social media?

In 2010, social media strategy became imperative for corporations and organizations. But what does that mean? First, it's important to know exactly what the term "Social media" encompasses. Here are three definitions of Social Media:

- The web-based and mobile technologies people use to turn communication into an active, multi-faceted dialogue (Wikipedia).
- The places and services people use to express themselves and share ([www.fredcavazza.net](http://www.fredcavazza.net)).
- The people who join and use specific groups and communities, giving them life ([www.whatisocialnetworking.com](http://www.whatisocialnetworking.com)).

The bottom line is that social media are all of those things, and the only thing more certain than their permanence is their imminent evolution. What they will become is anyone's guess, and that's exactly what makes them so valuable: Social media are constantly changing and improving to serve the needs of people who use them. When communication needs arise, social media tools fill them, and that gives them genuine value. Do they replace conversation? No. But they sure can enhance it.

That's not to say they're as simple as plug and play. With security settings, tracking and other tools, social media can be fairly complicated. It takes time, effort and understanding to use them. But just because you know how doesn't mean you should flood a social media site with messages. Make your groups meaningful. Link only relevant material. Engage in related blogs. In other words, stick to the point. It's also important to monitor your successes — and your failures. That way you can build on what works and discard what doesn't.

## The social media landscape in 2011

If you're in the grant-seeking game, you know the drill: An application deadline is quickly approaching and you need a document that's taking FOREVER to hit your inbox. Or you're playing phone tag with a colleague who is offsite. Or you've lost most of a day staring through your windshield to attend a two-hour meeting.

Those cumbersome, old-school methods that still dominate the grant-seeking process are in fact obstacles to your success. But social media tools — social networking and social business software, for example — can eliminate many of those pain points and help you stay ahead of your competitors.

Through social sites like Yahoo!, Facebook and Google, people can publish, share, discuss, conduct commerce, network and play games.

Rather than the linear back-and-forth of an e-mail, social networking allows real-time input from any number of participants, including researchers, IT people, grant marketers and people from outside your organization. They can touch it where they're sitting, move the process along and update you constantly on its status. Through the social media construct, information flows more freely and more efficiently and true collaboration will become a reality. That means less time waiting for emails, playing phone tag, sorting through versions of documents, and traveling to and from meetings, and more time pursuing the grants that drive your organization.

### Social Media Landscape 2011



## What is a grant marketer?

Smart companies use social media marketing to grow business, recruit and retain customers and partners, and to manage their reputation online, so why shouldn't grant-seeking organizations take the same approach? Attracting grant funding is a selling job, and it only makes sense from a business perspective to use tools that get the attention of staff, faculty, researchers, collaborators and funding organizations — everyone you need to market your funding opportunity. It's marketing.

Under the old model that means you get a listserv, then send out a long, gray email that requires recipients to slog through dozens of grant opportunities to find the single golden nugget that applies to them — then hope they respond in a timely manner. Or you could make it more compelling by adding color, a perky heading and even an email notification to let them know there's something good waiting for them inside. Pay attention to the things that catch your eye and compel you to act. Those are the same tools you can use to recruit people to work with you.

### OLD WAY

From: [jdiggs@University.edu](mailto:jdiggs@University.edu)  
To: Faculty Members  
Subject: New Grant to review

Thanks, Jim

Title: U.S. Offshore Wind: Technology Development  
Sponsor: Golden Field Office/Department of Energy

**SYNOPSIS:** Under this program, the sponsor addresses the Technology Development focus area with investments in modeling, technology innovation and research and development (R&D) to help advance offshore wind technology in achieving long term COE objectives. The primary objective of this Technology Development Announcement is to develop tools and innovative technologies that lower the Cost of Energy (COE) of offshore wind plant systems.

Headline(s): 04/15/2011

Established Date: 02/08/2011

Follow-Up Date: 02/01/2012

Review Date: 03/09/2011

Contact: Kerry L. Hebert, Grants and Agreements

Specialist

Address: 1617 Cole Boulevard  
Golden, CO 80401-3383  
U.S.A.

E-mail: [kerry.hebert@go.doe.gov](mailto:kerry.hebert@go.doe.gov)

Program URL:

<http://www07.grants.gov/search/search.do?sessionId=vNN4NRJW1nJ4hqBHpSjV2zLv3Mf5wscJfN5i2VhLyvgBTJXIC2nl-2128145017?oppld=891333&mode=VIEW>

Tel:

Fax:

Deadline Ind: Receipt

Deadline Open: No

\*See Restrictions for further information.

### NEW WAY

#### Grant opportunity 115700

Like (0)   Dislike (0) 

#### Funding Opportunity Announcement for FY 2011 SBIR/STTR Phase II Grant Applications

Grant Id#:	115700
Agency Name:	Department of Energy
Sub Agency Name:	Chicago Service Center
Opportunity Number:	DE-FOA-0000508 (view source announcement)
Estimated Total Program Funding:	\$116,000,000.00
Expected Awards:	120
Posted Date:	16-Feb-2011
Current Closing Date for Applications:	04-Apr-2011
Original Closing Date for Applications:	04-Apr-2011
Award Ceiling:	\$1,000,000.00
Award Floor:	\$1.00
Category of Funding Activity:	Science and Technology and other Research and Development

#### Description:

Funding Opportunity Announcement for FY 2011 SBIR/STTR Phase II Grant Applications The Department of Energy (DOE) invites all DOE SBIR/STTR Phase I Awardees from FY 2010 to submit Phase II grant applications. The Department may also reconsider previously submitted, peer-reviewed, high ranking Phase II grant applications from FY 2010. However, this is only at the discretion and request of the DOE Project Officer. Those applicants do not have an opportunity to reapply. If a previously submitted application is selected for funding, the applicant would be given an opportunity to determine if he/she is still interested and able to pursue the Phase II research project. The purpose of Phase II is to perform the research and development required to meet the DOE objectives stated in the technical topic of the Phase I funding notice. In addition, it is intended that the small business grantee would be in a position to pursue commercial applications of the R&D

You can also give them an easy way to respond: 'Like' or 'dislike' in a single click. In a fraction of the time it would take for them to read your lengthy email and respond — if they choose to respond at all — you know where to focus your attention. That is the power of the crowd. Think about it: Would you be more likely to respond to someone who says 'please e-mail me and let me know if you like this,' or would you be more likely to respond to an inquiry that says 'just click yes or no and I'll be happy'?

That's called crowd sourcing, and it's a great social media tool for gathering feedback quickly, easily and accurately. People will respond to it because you've made it simple for them: It's a single click. But for you those single clicks add up to a wealth of information. That click is being used successfully all over the Web, including [www.ideascale.com](http://www.ideascale.com) and [www.in4grants.com](http://www.in4grants.com). Whether a user likes the product or not, one-click feedback speaks volumes.

## The challenge of the tools

The existing array of social media tools each has its advantages, but also its challenges. Real-time chat is handy, but not secure. Many organizations have placed restrictions on Facebook and Twitter use in the workplace. Document sharing and management can be hard to learn. There are tools that are easy to set up and use, but lack functionality such as document sharing or feedback.

Some tools are meant specifically for a specific enterprise. When it comes to collaboration applications, less is often more.

In “Less is More for Collaboration in the Enterprise,” Michael Vizard on [www.itbusinessedge.com](http://www.itbusinessedge.com) said:

“According to Box.net CEO Arron Levie, the new version is aimed squarely at enterprise environments that need a clean, simple and intuitive approach to the user interface.

“That UI, says Levie, is critical because from a user perspective, the design of a browser application should not get in the way of the fundamental goal of sharing information.

“The Box.net approach, Levie says, will stand in sharp contrast to collaboration applications aimed at consumers and on-premise tools such as Microsoft SharePoint that are difficult to navigate.”

Activities	Social media tools	Challenges
Chat in real time	Facebook, Yammer	Low security
Document sharing, management	Dropbox, 4shared, Google sites	Learning curve
Enterprise System	Sharepoint, Confluence, IBM	Complex, IT Administration, High security
Project management	Manymoon, Base Camp	Learning curve
Comment, message, share	Facebook Groups, Google Groups	Low security, no document sharing, extended invitation
Crowd sourcing	Ideascale, Facebook Groups, Salesforce Ideas	No document sharing

## A better way to collaborate

It’s no surprise that there is a marked increase in the demand for collaboration across the grant-seeking world, and poll numbers show that the door is open for technology to bridge that gap:

**85** Percent believe that enterprise-wide collaboration is more important than individual specialization for success

- All said they recognized a greater need for collaboration, and most agreed that enterprise-wide collaboration is more important than the skills of any individual for success.

- 92 percent said their company’s rate of new technology has either remained steady or increased.

- Three quarters of them said they plan to increase the use of communications and collaboration technologies over the next year.

**75** Percent plan to increase the use of communications and collaboration technologies in the next year.

But with all those disparate social media tools out there, those seemingly positive numbers could turn into a free-for-all. The No. 1 tool for collaboration is still email, followed by the telephone. There are shared storage spaces, corporate portals, online team sites and conference calls. Some people still use land lines and hard-wired computers. Others carry smart phones equipped with apps that can keep them connected 24/7.

Say you do opt for collaboration technology. Which to use? The options are numerous and confusing, from Atlassian to Zimbra. Basecamp or Campfire? Socialcast, Socialtext, Confluence or Colaab? Wiggio? Zoho?

Need infrastructure? Real-time chat? Document sharing?

Document revisions? Crowd sourcing? **Source: Robert Scoble**

Project management? Feedback? And how easy does it need to be? How functional?

## There is a simpler way

Our poll showed that collaboration systems within organizations are just as erratic:

- Half the respondents said collaboration is done within departments.
- 35 percent said their organization has collaboration tools, but not everyone uses them.



Robert Scoble's social media starfish, 2007

That's what we've found in our research as well. Many use tools such as Google docs and Blackboard that aren't meant for collaboration. The No. 1 tool is still email, and most collaboration across the spectrum falls on the power user — that one person that everyone asks for help — simply because they know how.

But we can take the lessons of the social media generation and apply them to collaboration. Here's what that generation has taught us:

1. It is important to adopt an open communication style.
2. Share what the tools can do. Utilize the viral aspect.
3. Recognize power users, but let the software guide you and power users will be a thing of the past. Just keep clicking.
4. Go beyond online tools. It's still OK to pick up the phone, go across the hall or sit down and talk to someone.
5. Outline project goals and know what you're using the collaboration software for.
6. Adopt an acceptable usage policy.

## The InfoReady point of view

Here's what we think:

- If you search for information like a funding opportunity, you probably intend to do something with that information.
- People like to use what they already know how to use whether that's Excel, Word, email, Sharepoint, commenting, or a click to vote
- People want to initiate actions without having to wait for an administrator to set up project groups, build reports, authorize other collaborations, or set up functions.
- People will collaborate with who they choose to collaborate with, and they want to reach out beyond their own organizations.

- People will answer who they want to answer. If they know you or want to know you they will respond.
- Collaboration can be passive and still effective. Real-time chat isn't the only way to communicate; it can be just as effective to be invited through email, then go back to your workspace and interact.
- Enterprise workflow and collaboration systems are too complex. Alerts and notifications versus a rigid workflow can be very effective
- Collaboration activity should be tracked automatically, so users don't have to manually update things such as Activity, Comments, Updates, Profiles, Uploads
- Pictures are good, so smile. 