## LinkedIn & Prospect Research – Response to PRSPCL-L conversation
## Spring, 2015

**Best Practices:**

1) **How to use LinkedIn for Prospect Research:**
   - Use LinkedIn as a guide for research as you would with any other resource. Verify with other links (Business, news articles, etc.).
   - Check with your organizational policy and government regulations.

2) **Citing Social Media** (see - http://blog.apastyle.org/apastyle/2013/10/how-to-cite-social-media-in-apa-style.html for helpful hints):
   - Include a URL link and date retrieved as applicable.
   - For limited LinkedIn or social media information (privacy settings) – use Social Media Identification or Personal communication as your cite source.
   - Note: Some UK institutions do not cite LinkedIn as it is a breach of their Terms of Use
   - Check international social media and organizational terms of use as applicable.

3) **To identify yourself through LinkedIn or use the anonymous privacy setting:**
   - Practice Integrity – if you are asked, always identify yourself regarding who you are and the institution for which you are working (e.g."I work for XYC organization and we are trying to reach out to potential friends, alumni, people who might be interested in supporting our organization's mission, cause, etc.")

4) **Can I use my personal LinkedIn account to connect with other members for work purposes?**
   - A personal LinkedIn account is an acceptable practice to use for Prospect Research and connecting with prospects. Use the same integrity and sensitivity for the prospect and organization that you would for any other communication.
   - Use common sense – who in your organization holds the direct relationship with prospective donors and volunteers? Typically, this will be a frontline fundraiser or stewardship/donor relations position.
   - Does your shop have a guideline regarding the interaction between researchers and prospects? If it does, adhere to that policy. If it does not you have to determine which setting will put the organization and the relationship with the prospect first.

5) **To use LinkedIn for cold calling (vs connecting through LinkedIn connect):**
   - Use integrity based on what works for you and your organization.

- Check with your legal department for guidelines or protocol for using social media.
- Keep in mind the terms of use dictated by LinkedIn and other social networks. Many of them have a strict policy on "spam" and this may also put your organization at risk if you are not complying with laws regarding such.

**6) Anonymous searching vs. creating profiles under false names:**

- Fake profiles are a violation of the Terms of Use for both LinkedIn and Facebook.
- Anonymous searching is a privacy setting provided by LinkedIn. The LinkedIn member whose profile you viewed knows *someone* viewed their profile, however, that LinkedIn member will not know who viewed them.

**7) Prospect Research and concerns with prospects knowing you researched them and possibly contacting you:**

- A prospect may not know that you are researching them. We live in a world where privacy can be threatened through a number of sources. People are wary.
- Anonymous searching isn't deception – It's a privacy setting. A LinkedIn user can limit how much of a profile is visible to non-connections. If a prospect/Linked-In user does not wish to share their current information, he/she can hide it. More information may be read here: https://help.linkedin.com/app/answers/detail/a_id/47992/ft/eng
- As available/viewable, use information from LinkedIn and Facebook judiciously as pertaining to the engagement and moves of prospects.
- Reviewing public records should not present an ethical issue. There is nothing illegal, immoral or distasteful in viewing material which has been set out for public consumption. But, just because something fails to pose an ethical dilemma does not necessarily mean that it is a good idea. An action can be ethical while still not representing a best practice. Ultimately, we all have different obligations to our respective organizations. Check with your institution's legal team if issues arise that may affect your institution and the use of social media platforms.

**8) Considerations:**

- Does the depth of a prospect research profile supersede the sensitivity of a prospect and their relationship to your organization?
- If a phone call or research opportunity (LinkedIn connect) could jeopardize a potential gift, don't do it.
- It's about building relationships. Focus on your mission and the prospect and their positive relationship to your organization.

**9) Prospect Research vs. Fundraiser Intelligence:**

- Prospect Research provides a guide for wealth, interests and philanthropy as available publically. Our role is to find links to help connect fundraiser to prospect to then build that relationship between prospect and institution.
- The opportunity for expanding and building that relationship is the Fund/Friendraiser's task. They ultimately determine the ask based on their personal experience with the prospect and their propensity, readiness and capacity.
- The emphasis should be on Prospect Research and Fundraisers working together. Prospect research can never take the place of information gathered through a personal meeting (which should be shared with the Prospect Researcher through a call report). Prospect Research should be used as a guide for the fundraiser to ask the right questions and build meaningful partnerships with prospects and institutions.

**10) Creating a LinkedIn Company Page:**

- Creating an organizational LinkedIn page can enhance the work your organization does and help build relationships.
- Most often a PR/Marketing department, Alumni Relations, Friends of the XYZ org. would develop this; however anyone can create a page.
- The LinkedIn page should be used to help develop a positive information sharing network which allows you to gather important information and highlight the work of the organization and/or prospects, and celebrate accomplishments (contact a prospect and tell them you would like to feature a little bit about them on your page or publication etc). This creates an opportunity to connect in a positive way. People who are interested will participate.

**Types of LinkedIn pages:**

- **Personal Profile Page** (similar to Facebook in that you must be connected and accepted to view the entire profile). You can set it with different privacy settings but ultimately there are certain things that will always be public – e.g., where you currently work, where you went to school typically. Example of a personal profile page, http://linkedin.com/in/samdemuro
- **Publicly-available LinkedIn Profile:** Some profile sections will not be displayed on a public profile, which is the version of a profile people see when not signed into Linked-In. These sections are only visible to LinkedIn

members who view your profile while signed into LinkedIn. These sections include:

- *Recommendations* – The number of people that have recommended you will appear in the top section of your profile. However, the full text of the recommendations will not. The full text of your recommendations is only visible to members who view your profile after signing into LinkedIn.
- *Additional Info* – This section, which contains interests, birthday, marital status and advice for contacting you will not display on your public profile.
- *Rich Media Work Samples* – These items will not display on your public profile.
- Source: https://help.linkedin.com/app/answers/detail/a_id/52959
- Information about how to customize what is publicly-available can be found here: https://help.linkedin.com/app/answers/detail/a_id/83/~/linkedin-public-profile---overview-and-settings

- **Group Page** – these can be private or public, but you must have a profile page in order to be in a group. Alumni currently have a private group where they interact with different alumni.
- **University Page**: example of a University page (for alumni & current students of a University): http://wpunj.edu/linkedinwp
- **Company Page:** example of company page (for employees of William Paterson or whatever company) https://www.linkedin.com/company/18297

**A final note from Tim Olivieri, Cornell University Alumni Affairs and Development:**

With any ethics guideline there is a temptation to lay out a roadmap for every sort of acceptable or unacceptable practice. But the guideline, as a practical necessity, needs to allow for grey areas. Ethical guidelines should not be a roadmap. They should be a fence along our perimeter that help prevent us from straying off into the wilderness. Using a privacy setting for your personal social media account is not really a foray into the wilderness. Guidelines? Yes, please. Pedantics? No, thank you.

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This is a dynamic document, to be reviewed and updated by the Apra Ethics & Compliance Committee based on issues that arise in the prospect development community.