

A photograph of four elderly individuals—two women and two men—sitting around a red circular table in what appears to be a community center or senior center. They are all smiling and looking towards the camera. The woman on the far left is wearing a red jacket over a black top. The man next to her is wearing a yellow polo shirt. The woman next to him is wearing a purple jacket over a pink shirt. The man on the far right is wearing a blue striped button-down shirt and is laughing heartily. On the table are several black mugs, a stack of white papers, and some pastries. In the background, there are teal-colored cabinets, a counter with various items, and a colorful framed picture on the wall.

LeadingAge®

PUBLIC RELATIONS Toolkit

Updated 04.18

CONTENTS

1. LeadingAge TOOLKIT OVERVIEW

What _____ 2

Why _____ 2

How _____ 2

Elements _____ 2

LeadingAge: Language and Positioning

Messaging, Outreach and Relationship building; Crisis Communications

Samples for resource creation

2. SOCIAL MEDIA

Using Social Media to Build Your Brand Awareness and Community

Facebook _____ 6

Twitter _____ 6

LinkedIn _____ 7

Instagram _____ 7

3. CRISIS COMMUNICATIONS

Overview _____ 9

General _____ 9

Prepare _____ 9

Test _____ 9

Revisit _____ 9

4. SAMPLES FOR RESOURCE CREATION

Fact Sheet _____ 11

Press Release _____ 12

Media Advisory _____ 13

Executive Biography _____ 14

1. LeadingAge PR TOOLKIT OVERVIEW

What

Why

How

Elements

Language and Positioning

How-to: Messaging, Outreach and Relationship building

Story creation

Messaging and pitch

Target

How to reach out to reporters

Interview best practices

Samples for resource creation

Crisis Communications

What:

Public relations (PR) refers to an organization or company's communication with external audiences: business collaborators and rivals, industry groups, the general business community as well as with consumers.

Media relations, a subset of public relations, concerns organization positioning, interaction with and communication through, members of the media. A second subset of public relations is *crisis communications*, which focuses on protecting and defending the reputation of a company or a person.

Why:

We work hard, each day, to serve, advocate and inspire in our mission to be the Trusted Voice for Aging. The more that our work and our achievements are known and recognized beyond our field, the greater our influence. Our challenge—as for all organizations today—is to stand out and be heard. By developing consistent messaging and telling compelling stories of our work—in policy, in education and technology, on workforce development, and in applied research—we can build awareness of our brand, and the commitment to long-standing ideals and to our mission. We aim to be known as an authority on aging services.

Media relations, an important component of public relations, can help us achieve that goal. By developing and maintaining strong relationships with key national and local journalists, as well as with influential industry organizations, our stories can be shared and our message amplified. Journalism today is 'always-on,' thanks to social media, even as the popularity of traditional news sources, such as local broadcast and cable TV, or print-and-online news outlets, continue to plummet as the go-to sources of information. "Twitter allows the 24/7 monitoring of reporters' beats," journalism professor Alecia Swasy [observed in early 2017](#), which is significant given that two-thirds of Americans report that they get at least some of their news on social media, according to Pew Research in Aug. 2017. Reporters, an active and prominent percentage of Twitter users, Swasy noted, "build their social capital by breaking news in their communities, which translates into more readers, which attracts more advertisers... for reporters, Twitter expands their readership to an entire globe that was once limited to geographic circulation boundaries."

In short, having strong connections to reporters who care about and cover the issues in which LeadingAge is involved can help to extend the reach of our message and broaden our influence.

How:

Media relations needn't be complex. Success is achieved by understanding reporters' interests, knowing how to interact with journalists and providing them with what they need to do their job. This toolkit is intended to guide you through the basics of message development, resource preparation, and media interaction.

- Brand basics (mission, vision, promise, values, pg. 3 of Brand Manual)
- Brand model (pg. 4 of Brand Manual)
- Boilerplate (pg. 2 of Brand Manual)

Elements:

LeadingAge: Language and positioning

- Brand basics (mission, vision, promise, values, pg. 3 of Brand Manual)
- Brand model (pg. 4 of Brand Manual)
- Boilerplate (pg. 2 of Brand Manual)
- Language and style guide (pg. 32, 33 of Brand Manual)

How-to: Messaging, Outreach and Relationship building

- Story creation
- Messaging and pitch
- Targeting
- Contacting reporters and relationship building
- Interview best practices

Crisis Communications

Essential documents for PR outreach

- **Fact Sheet:** this is a one-page document that provides the essential information about your organization, presented according to our brand basics (page 3 of brand manual). For guidance on what to include, consider the five W's (Who, What, When, Why, Where), followed by bullet points on major initiatives (policy, research, ageism, etc.) with links to your website, the LeadingAge.org site and specific LeadingAge-created resources (i.e., reports, news releases, policy positions, etc.). *See sample fact sheet on page 11*
- **Press Release:** this is an official document, issued by the news-making organization, relied upon by journalists as an authoritative source. *See sample on page 12*
- **Media Advisory:** similar to a press release, this is an official document issued by the news-making organization containing facts on a specific event. *See sample on page 13*
- **Executive Biography:** this is a one- or two-paragraph document with a high-resolution image of your organization's senior-most executives. Focus on the basics: name, title, responsibilities, year appointed to the role and a few sentences on background (prior job, career achievements, education) and personal details (family, hobbies) *See sample on page 14.*

How-to: Messaging and Outreach

Creating a clear message and developing talking points is a crucial first step to take prior to contacting and speaking to journalists. You'll make a positive first impression once you begin outreach if you are prepared. Know your objective, messaging and talking points, and then reach out with a pitch that is relevant to reporters at outlets you've targeted.

Story creation:

What does your organization do that can be perceived as having "news value"—interest for a wider audience, expertise in specific subject areas, connections to current events and cultural trends. Reporters are, generally speaking, a skeptical bunch, so test your ideas on friends and ask for feedback on what piques curiosity.

Messaging and pitch:

These are the succinct statements that you want to convey and have the reporter understand. Use clear language, free of industry jargon, and back up your statements with proof. Avoid overstatement, exaggeration and use of superlatives (i.e., 'best,' 'No. 1,' etc. unless proven by a credible authority (i.e., ranked No. 1 by U.S. News & World Report, etc.). A pitch is a one-paragraph summary with a 'hook' (interesting angle) written to entice a reporter and, ultimately, his/her audience. Two

important questions to address: 1. "Why should anyone care?" and 2. "Why now?" Remember to tailor your pitch to each audience (local, national, policy, lifestyle, etc.)

Target:

Analyze the audience you want to reach. If your news or expertise is related to governmental policy, for instance, assemble a list of reporters who cover legislative affairs or government at local or national levels; for healthcare focused issues, you'll want to go to reporters on the health beat or who write for industry/subject specific outlets. (i.e., Medicaid, skilled nursing, aging). Take the time to identify five or so journalists to target as your go-to stable of media contacts at the outlets you've identified as primary to helping you achieve your objectives for media outreach. Track bylines and follow reporters on social media (Twitter is a particularly useful resource) to familiarize yourself with interests and stories.

How to reach out to reporters:

Email a pitch or a media advisory (see sample examples in this kit) cut and pasted into the body of an email. Most reporters do not want to be pitched via Twitter or other social media platforms. Avoid sending attachments to emails. Write an engaging subject line, starting with PITCH. If you are pitching multiple reporters, use the BCC or create separate emails. No reporter likes to know he or she is one of many recipients.

Timing: If your message is time-sensitive (i.e., related to a specific event), note “time-sensitive” in the subject line. Always begin your outreach with sufficient lead time for a reporter to cover the story, if he or she is interested. Two weeks to ten days is optimal for daily reporters. Monday through Thursday, mid-morning (10 a.m.) to 2 p.m. is the ideal time to reach reporters before mid-afternoon deadline crunch for next-day stories. If you have to share some potentially negative information, pitch mid-afternoon Friday to get the tail end of a news cycle.

Follow up: Wait for a day or two before following up with a phone call or a second email; keep messages brief and fact-filled (I’m contacting you about the email I sent on day/month/time, with information on etc.).

Responding: Prepare yourself or your designated spokesperson to be on call and ready to respond to reporters’ queries once your outreach is under way.

Tracking: It is a good idea to keep track of your outreach both so you do not follow up twice or send identical pitches to the same reporter. It is also wise to develop a stable of contacts to follow, refer to and build on.

Interview best practices

News cycles today are extremely fast and reporters— particularly at trades and local outlets with small staffs—churn out multiple stories each week. Best practices when speaking to reporters

include:

- Prepare. Know what point you want to make or message you want to communicate. If you aren’t the interviewee, make sure to spend time with that person and prepare him/her.
- Start by asking the reporter for his/her contact information (name, outlet, email, cellphone) if you do not already have it so that you can contact him/her after the story is live, and build a relationship.
- Next, ascertain the focus of his/her story so you have a solid understanding of what the reporter wants/needs and can respond appropriately (if a reporter is responding to a pitch you’ve sent, do this via a friendly inquiry “Thanks for your response to my email. Tell me what aspect of the information I sent you would like to focus on”). Never assume you know what the reporter’s story is, *even if you have pitched it*. Ask.
- Speak slowly, using clear, jargon-free language and in short sentences. Avoid acronyms. Reinforce the messaging and facts from your pitch by rephrasing (but not repeating) the language.
- If the reporter does not ask you questions that allow you to state your message, make your point by saying, “I’d like to add that...” or using another bridge to return to your message.
- Back up your statements with facts, preferably from credible sources, to prove your points.
- You are not obligated to answer a question if you do not know the answer. Telling a reporter that you want to double check and

get back to him/her is perfectly acceptable. If he or she presses you for an answer, be firm and politely decline, but promise to follow up quickly, then do so.

- If a reporter asks you for information on background, the safe approach is to never tell a reporter something if you do not want to see it in a story. However, if you trust the reporter and are willing to accept the risk—before providing information on background—ensure that you both understand and agree to the terms (i.e., your name will not appear, and your organization will not be associated).
- At the end of the interview, ask if the reporter has additional questions; if you’ve agreed to send information (i.e., a report, a link to a study, a photo, etc.) tell him/her when you will do that. If a photo is requested, request file specifications (file type, etc). Ask when the reporter expects the story will be published (he / she may not always know).
- Once the story is published:
 - If you are pleased with the results, send a brief note of thanks acknowledging the work and offer to be a source, contact, for future stories. Follow the reporter on social media and share his/her work with your followers.
 - If the story is incorrect, reach out as soon as possible after the story is published to request a factual fix. Many outlets will fix obvious errors (i.e., misspelling a name). However, having major changes made to a published piece or having a story retracted is extremely difficult.

2. **LeadingAge SOCIAL MEDIA**

Using Social Media to Build Your Brand Awareness and Community

Facebook

Twitter

LinkedIn

Instagram



Using Social Media to Build Your Brand Awareness and Community

LeadingAge is active on Facebook, Twitter, LinkedIn, and Instagram.

Facebook

Facebook is a platform of community and conversation. As the leader of your Facebook account, be sure to keep your 'friends' engaged by posting regularly. We publish two to four posts per day, for instance, on topics related to aging services. We write in a casual tone, and use a variety of post 'types'—questions, facts/statistics, quotes, or a summary of an article—to continually attract current and prospective 'friends'.

TIPS:

Tagging: If the article is about a member, corporate partner, or partnering nonprofit organization, do a quick search on Facebook for their page, copy the page name from the URL (e.g. www.facebook.com/geronsociety/ is for GSA). In the comment use @[URLpagename] and it should auto-generate a clickable page name. No need to tag media outlets, but individual reporters generally appreciate your sharing their work with your followers to increase views.

Link: When you want to share an article, copy paste the URL into the comment box, wait for it to populate the article box, then delete the link. Check and clean-up the following:

Image: ALWAYS include an image, and avoid logos if at all possible. If it doesn't auto-populate an image, or the image is blurry, a logo, or cut off, click on the little plus sign below the article box to upload an image. Free stock photos are your friends!

Image sizing for Facebook—follow these dimensions for uploading photos. A quick way to change photo dimensions is to use Canva and set the canvas size for the particular dimensions you want, then upload the picture you want to use and fit it into the canvas.

Commenting: Some experts^{1 2} recommend commenting and responding to every post on your page, and answering any questions that arise as a way to build connection with your community.

¹<https://blog.bufferapp.com/facebook-group>;

²<https://www.facebook.com/business/learn/facebook-page-build-audience>

Twitter (@LeadingAge)

Twitter is a platform for sharing and following, and is a great way to 'listen' to 'affinity' groups and influencers (i.e., people with large followings on Twitter and other social media platforms). Wise use of hashtags will help you join a conversation in the 'Twitter-sphere', and can help to build awareness of your organization among larger audiences. We tweet four to 10 times a day, depending on bandwidth. Using a platform such as Tweetdeck or Sprout, you can plan Tweets in advance and schedule the posts.

TIPS:

Comment: You have 280 characters, so keep it brief and use abbreviations. The comments should read as sentence. If you are using an article headline, make sure all the words are lower-cased (except the 1st word). Always proofread.

NOTE: Tweets are not editable once posted. If you spot a mistake, delete the tweet and repost.

Hashtags (#XX): Incorporate the hashtags into the sentence if possible, if there's room, you can also add relevant hashtags at the end. Limit your use of hashtags to two per Tweet; more can be distracting to readers. Avoid inventing hashtags; search online for existing tags before posting via Google or at specific sites like Hashtags.org, or, if you are live-Tweeting at an event, ask organizers for the event's hashtag.

Handles (@XX): If the post is about a partner, member, or LeadingAge staff member, look up their handle on Twitter or Google and include it in the post. If the post is about a news article, include the outlet's handle after the link using the following format: via @[handlename] (you can delete the via if you need the characters). Reporters appreciate your sharing their stories with your followers to increase views of their work.

NOTE: If you want to start a post with someone's handle, put a period before the @ symbol, otherwise it sends it as a message and won't be posted on our wall.

Link: The link will automatically shorten to a bit.ly link and will always take 22 characters. Always put the link after the comment.

Engaging and responding: Monitor your Twitter feed and respond to @mentions quickly. Doing so signals that you are active and engaged. Download mobile apps for Twitter or Hootsuite to check your feeds on-the-go. Mentioning others in your Tweet and retweeting content of partners increases the likelihood that others will share your content with their followers.

LinkedIn

LinkedIn has evolved since its start in 2003 from a networking-and-jobs focused social platform to a broader online community focused on professional issues and business topics. It is a useful forum for sharing news and opinion pieces related to aging services, and to build a following interested in ideas and thought-leadership. As with other social platforms, the key to engaging your community is activity: respond to comments, like or share posts, and participate in relevant industry groups. Our writing style in comments is on the less formal side. Ideas for the comment include: a question, statistic, 1-2 sentence quote, summary of a linked article. Always proofread.

Frequency: LinkedIn recommends frequent postings to build your following; their data shows that the highest-performing Company pages post several times a week.

Hashtags: Only exception is our event hashtags,

i.e. #LeadingAge[year] and #PEAK[year], include those for visibility.

Link: When you want to share an article, copy paste the URL into the box, wait for it to populate the article box, then delete the link. Check and clean-up the following:

Header: Should not have the name of the outlet or organization, should only be the title of the article.

Summary: Read what is auto-filled in the summary section, if it isn't interesting, scan the article for 1-2 sentences that either summarize the article or are captivating and then paste that in the summary section.

Image: ALWAYS include an image, and avoid logos if at all possible. If you want to change the photo, click on the little plus sign in the top right corner of the image box.

Image: If you want to share a stand alone photo (without a link), click on the little paperclip in the comment that says "attach a file." Useful if you want to share an infocard or a photo from an event.

For more info: [How to Build an Organic Following on your LinkedIn Company Page](#)

Instagram (LeadingAge)

This is an easy-to-use platform that's all about visuals. That's it: photos, so the images shared should be engaging, clear, and action-oriented. If the only photo you could take of the event/per-

son/thing is dark or blurry, DO NOT USE, it isn't worth it. When picking a filter, only pick filters that make the photo clear and bright, don't use any that drastically change the color or blur out sections.

Comment: Our writing style in comments is on the less formal side. Ideas for the comment include: a question, statistic, 1-2 sentence quote. Do not share articles on this platform. Always proofread.

Hashtags: Use 3-4 relevant hashtags, if applicable. Either within the sentence or at the end after the period.

Tagging: If the article is about a member, corporate partner, or partnering nonprofit organization, do a quick search on Instagram for their page, their handle is at the top of their profile, and add @[handle] to the post.

Language Note: All of our social media now tries to fall in line with anti-ageism language. If the article has an ageist title or message, discuss with the group about the pros and cons of sharing the article.

3. Crisis Communications

Overview

General

Prepare

Test

Revisit



Crisis Communications

Crisis communications is a specialty within public relations focused on protecting the reputation of a company, an executive, or both, in the event of a threat.

A crisis, by definition, is a short-term event or period of intense difficulty or trouble. The most obvious demonstration of crisis communications is a corporate response to a negative event, such as the 1982 case of Johnson & Johnson's response to tampering of its Tylenol brand medications, or the recalls, in 2010, of Toyota's Prius vehicles due to faulty braking systems. As the J&J and Toyota incidents illustrate, managing an unfortunate situation well (Tylenol) or poorly (Prius) can have long lasting impact on a company's image. The fast pace with which news can spread in our 'always on' digital world, warrants devoting some time to mapping out a strategy and roadmap for maintaining and protecting your organization's reputation to be prepared for a difficult situation.

Overview: Credibility is created and maintained by operating with transparency. Your company's digital presence is the outer door that is always answered if anyone—potential and current customers, business partners, investors, vendors—knocks. Make contact information visible and ensure that all inquiries are received and get a response. Active, 2-way communication with current customers and prospects, through social and

traditional media, helps to establish and position a company, and establish its brand, by demonstrating its interests, its values and personality. Protect it using the guidelines below:

General: Broadly speaking, when a crisis occurs, your top priority is to ensure the health and safety of your residents. Take leadership of the situation by gathering the facts, verifying, and communicating the situation—both bad news and good—at once. Do not blame, do not speculate; lay out the facts, explain your story, and take responsibility. Express care and concern for those affected. Management should be visible: a crisis is the time for leaders to step forward. Communicate a plan for fixing the problem and ensuring that it will not occur again.

Prepare: Start before anything bad takes place. Brainstorm the type of potential situations that might arise. Draft a plan to handle each scenario.

Questions to answer:

Who will be your spokesperson?

What is your message?

What audiences need to be addressed, and in what order? (i.e., patients, patient families, board members, staff, public, media, etc.)

What will the process be to create and approve messaging, and then distributed?

Who will have approval to create and distribute messaging; what channels will be used to distribute (email, social media)?

What media outlets and reporters can be tapped if proactive outreach is needed?
If you need outside help in managing a crisis, do you have resources on hand?

Test: Assemble a group to function as a crisis communications team, select a specific crisis scenario, and, collaboratively, work through the process of executing a crisis communications plan.

Questions to answer:

What are the facts of the scenario?

Who needs to be contacted about the crisis, and in what priority?

What will each audience be told?

When and how will you tell them?

Who will be your point of contact and your spokesperson?

How will you ensure that everyone in your organization knows the point of contact and the spokesperson?

What message must be communicated to ensure the credibility and good standing of your organization?

How will the message be communicated, tactically: press release, social media, etc.

Revisit: Situations and organizations change. Make Crisis Communications preparation and testing an annual practice to ensure messaging fresh and how-to knowledge among employees and leadership up to date.

4.

SAMPLES FOR RESOURCE CREATION

pg. 10

Fact Sheet

Press Release

Media Advisory

Executive Biography



Fact Sheet_SAMPLE**About LeadingAge [Insert state partner name here]****Mission and background:**

LeadingAge was founded in 1961 as the American Association of Homes for the Aging (AAHA) to provide our members, non-profit providers of aging services as well as state partners, consumer groups, foundations and research partners, with advocacy, education, resources, research and innovation in key areas including policy, technology, housing and workforce.

About LeadingAge [Insert State Name here]

LeadingAge [Insert State Name Here], a state partner to LeadingAge national (www.LeadngAge.org) headquartered in Washington, D.C., is an association of nonprofit aging services organizations serving residents and clients through life plan/continuing care retirement communities, senior housing, assisted living, nursing homes, adult day centers and home-and-community based services. Together, nonprofit organizations collaborate to expand the world of possibilities for aging.

[Insert state address, phone number, email and link to website here]

Members:

LeadingAge has over 6,000 members within the aging services sector including 38 state partners and thousands of nonprofit providers of care. The latter span a wide range of types, including adult day, assisted living, home and home health, hospice, nursing home, life-plan community (CCRC), senior housing, senior centers, meals programs, villages and transportation. For the full list of provider types, [click here](#); for a list of state partners, see [this](#).

State specific: state partners can modify the description above in keeping with their membership roster.

Focus:

LeadingAge provides advocacy services at national and state levels on policy matters around aging services; creates and offers educational resources for members in aging-services subject areas; conducts applied research in housing and technology for care of older Americans; and innovates in creating solutions for workforce development. [Insert state-specific focus if appropriate]

Leadership:

LeadingAge [Insert State Name Here] is led by:

[Insert executive name here], CEO

[Insert executive name here], [Insert title here]

For a full list of our staff, click [insert link here]

Press Release_SAMPLE

[Insert headline here: main news]

[Insert deck here: optional descriptor to elaborate on headline]

[Contact person name]

[Contact person e-mail; phone number]

[Insert dateline/place of issuance/date of distribution]. Paragraph 1 of the press release contains the what and the why, written in a factually accurate and engaging style that makes a reporter take note. Avoid exaggeration, jargon, and sales pitches.

Paragraph 2 of the press release expands on the information announced in first paragraph, adding more details and context, as well as a quote from relevant executive of your organization, with his/her title. The quote should amplify, not repeat, the primary message of the release.

Paragraph 3 of the press release provides additional details, and possibly a second quote.

[insert company boilerplate here: a short description included on every official document, ending with company website]

See a live version of a LeadingAge Press Release at: <https://www.LeadinAge.org/press-release/LeadingAge%E2%80%99s-cast-debuts-tools-and-insights-latest-tech-aid-older-adults-social>

Media Advisory_SAMPLE

Contact: [Insert name here]

Contact information: [Insert phone number; email here]

[Insert Month, Day, Year here]

[Insert headline here: SAMPLE: LeadingAge Launches SaveHUD202 Campaign]

[Insert What message here:

LeadingAge Targets Funding of Housing for Elderly (HUD202) in Action

Hundreds of Advocates to Rally in Washington D.C.]

[Insert: Kick off Date, Time, Location]

[Insert explainer: SaveHUD202 is a ... definition here. One sentence explaining why: the low-income older adult population is increasing, with projections to grow to WHAT by WHEN. Affordable, safe housing that can accommodate this group's changing needs is crucial. HUD 202 provides funding for housing with services to allow this population to age in place longer and with more positive health results. Current estimates by who reveal predict significant shortages in the years to come unless HUD funding is continued.

[Insert quote CEO or organization executive quote: "Cuts to the HUD 202 Program will have a devastating effect on many older adults who rely on affordable housing options. As the number of older adults increases rapidly, more—not less—funding is needed."]

[Insert organization boilerplate here]:

See a live version of a LeadingAge Media Alert at: <https://www.leadingage.org/press-release/media-alert-leadingages-robyn-stone-joins-experts-aging-place-us-japan-housing-and>

Executive Biography_ SAMPLE

[Insert State Partner name, i.e., LeadingAge Virginia]

[Insert executive name and title, i.e., Melissa Andrews, President & CEO]

Melissa Andrews is president and CEO of LeadingAge Virginia. Since July 2016, as head of this LeadingAge state partner office, Melissa leads a staff of three and is responsible for association management and growth, including the formulation and implementation of strategic goals and communicating LeadingAge VA's vision to a range of stakeholders, partners and agencies. Melissa came to LeadingAge Virginia after 13 years at LeadingAge headquarters in D.C., where she began as managing director sponsorship, rose to regional vice president followed by vice president, member relations and board development. A graduate of Boston College, Melissa enjoys reading, attending live theatre and music events, and travelling with her family—husband Todd; daughter Eliza; stepdaughter Taylor; and stepson, Jordan.