

Strengthening Outreach Efforts:
Sustaining and Building Relationships

SEPTEMBER 20, 2010

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What We'll Cover Today

- Our Experience
- The Goal
- How We'll Get There
- Organizational Partners
- Media Outreach
- Online Advertising & Outreach
- Measurement
- Comments and Questions

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Our Experience:
 American Association of Poison Control Centers

POISON Help
 1-800-222-1222

We developed a communications toolkit and managed the outreach efforts of 66 poison control centers. We also pursued media coverage in national and regional outlets, placing stories in 5,000 newspapers and on 8 radio networks.

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Our Experience: Corporation for Public Broadcasting

We created a national outreach platform touting the value of public media for use by public radio and television stations across the country. To inspire the creation of local PSAs, we filmed national spots with high-profile individuals. We ensured consistency among the PSAs by creating an internal website and toolkit.

Public broadcasting is my "source for great performances"
— CECIL BALUNGHIN


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Our Experience: KnowHow2GO

We trained 16 state networks to implement KnowHow2GO, a national college access campaign by the American Council on Education. They recruited partners, conducted media outreach and distributed materials.


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The Goal

- Increase the number of appropriate clients who contact Pension Counseling & Information Projects for assistance
 - Strengthen relationships with key retirement- and income-related government agencies, and private organizations
 - Raise awareness of your projects' work with the organizations most likely to refer potential clients

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How We'll Get There

- Promote the counseling projects and the National Pension Lawyers Network through organizational partnerships and media outreach
- Provide you with the tools and guidance needed to build and sustain relationships with organizations and media
- Establish regular check-ins and trainings to enhance project outreach efforts and share best practices
- Utilize a coordinated approach to ensure message consistency

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Current Outreach

Organize mailings	Distribute uniform materials	Create localized materials
Make presentations	Exhibit at events	Send e-mail updates
Collect case studies	Issue press releases	Give media interviews

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Moving Forward: Organizational Partners

- It's important to build and sustain relationships with partners who can...
 - Distribute materials to their members
 - Endorse and spread the word about your services
 - Introduce you to other related organizations
 - Refer potential clients to your project
 - Serve as legal resources after clients' appeal processes are exhausted

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Types of Organizational Partners

Type	Organizations
Federal & State Government Agencies	Administration on Aging, Department of Labor, Employee Benefits Security Administration, Internal Revenue Service, National Institute on Aging, Social Security Administration, U.S. Department of Veterans Affairs
Polymakers	Federal, state and local
Legal Community	American Bar Association, American Civil Liberties Union, Legal Aid Society, National Academy of Elder Law Attorneys, National Association of Attorneys General, National Employment Lawyers Association, National Legal Resource Center, National Pension Lawyers Network, National Senior Citizens Law Center
Pension-Related Organizations	Financial Planning Association, National Association of Insurance and Financial Advisors, National Association of Personal Financial Advisors
Aging Groups	AARP, Alliance for Aging Research, Alliance for Retired Americans, American Federation of Aging Research, American Geriatrics Society, Gray Panthers, National Association of Area Agencies on Aging, National Council on Aging, National Retiree Legislative Network
Senior Groups	Experience Works, National Institute of Senior Centers, Senior Corps, Senior Service America, Veterans Voluntary Service, local senior centers

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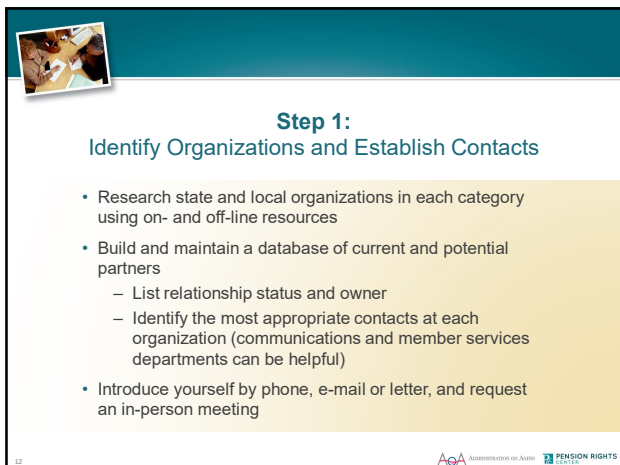


Three Steps

- Identify Organizations & Establish Contacts
- Personalize Your Asks
- Follow Up

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Step 1: Identify Organizations and Establish Contacts

- Research state and local organizations in each category using on- and off-line resources
- Build and maintain a database of current and potential partners
 - List relationship status and owner
 - Identify the most appropriate contacts at each organization (communications and member services departments can be helpful)
- Introduce yourself by phone, e-mail or letter, and request an in-person meeting

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Step 2: Personalize Your Asks

- Your asks should be specific to the organization with which you are meeting
- This means you need to research, in advance...
 - What they do and who they serve
 - Communications vehicles
 - Dates of upcoming events

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Asks: Local Social Security Office




- Link to your project website
- Display or distribute materials
- Include fact sheet and business card in benefit packets
- Refer beneficiaries interested in pension recovery
- Co-host an internal training about the project's work
- Co-host an informational event for seniors
- Place an article about your project on their website or in one of their communications vehicles


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Asks: Local Bar Association




- Link to your project website
- Distribute materials to members
- Co-host an internal training about the project's work
- Place an article about your project on their website or in one of their communications vehicles
- Refer relevant cases
- Consult on complex cases
- Join our advisory committee
- Serve as a referral source on cases for which the appeals process has been exhausted

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Asks: Local Senior Center



A Unit of the National Council on Aging




**ACCREDITED BY
NATIONAL INSTITUTE OF
SENIOR CENTERS**

- Link to your project website
- Display or distribute materials
- Co-host an informational event for seniors
- Place an article about your project on their website or in one of their communications vehicles
- Exhibit at senior events
- Offer onsite counseling on a regular schedule
- Recruit and deploy peer ambassadors

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Step 3: Follow Up

- Keep in touch
 - Send an occasional e-mail about a successful recovery in a particularly complex case
 - Alert partners to meetings, events and activities they may have interest in attending
 - Cultivate personal relationships with your contacts (invite them to meals, send them holiday cards, etc.)
 - Continue making asks, as appropriate


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Tools at Your Disposal



- Collateral materials
- How-to guides
- Messaging framework
- Templates
- Monthly calls with National PARC to track progress
- Quarterly best practices conference call
 - Two most successful outreach activities
 - An idea that did not work as well

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Organizational Partners Discussion

- Can we clarify anything we have discussed thus far?
- How can National PARC help you build and sustain relationships with organizational partners moving forward?

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Moving Forward: Media Outreach


- It's important to build and sustain relationships with media who can...
 - Include your project in on- and off-line resource lists
 - Consult and quote your leadership on relevant stories
 - Profile your project and clients whose pensions you have recovered





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Types of Media

Type	Outlets	Example Targets (Orlando, Florida)
Print	Community, daily, magazine, news service/syndicate	Associated Press, El Sentinel Orlando, Florida Today, News Journal, St. Petersburg Times, Star-Banner, Orlando Sentinel, Tampa Tribune
Radio	AM, FM, regional radio networks	WCFB-FM (ABC), WFLF-AM, WHTQ-FM, WLOQ-FM, WMFE-FM (NPR), WMMO-FM, WNUE-FM, WOKB-AM (American Urban Radio Network), WOMX-FM, WOTS-AM, WRLZ-AM
TV	Regional cable and TV networks, TV stations	WESH-TV (NBC), WFTV-TV (ABC), WKMG-TV (CBS), WOFL-TV (FOX), Central Florida News 13, Orlando Matters, WVEN-TV (Univision)
Online	Blogs, Internet magazines, radio networks and weeklies	Blogs.OrlandoSentinel.com, Blogs.OrlandoWeekly.com
Newsletters	See organizational partners	

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Three Steps

- Identify Outlets & Establish Contacts
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- When You Have News...
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- When You Don't Have News...

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Step 1: Identify Outlets & Establish Contacts

- Receive a targeted media list from National PARC
 - List will include 10+ state and local reporters covering business, personal finance or senior issues
- Introduce yourself by phone, e-mail or letter, and request an in-person meeting for your project spokesperson
 - Do not go into the meeting with an expectation of coverage
 - Use the opportunity to educate the reporter about your project's work
 - It will make follow-up, when you do and do not have news, easier

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Step 2: When You Have News...

- The following announcements might be of interest to media:
 - Large or unique recoveries
 - Recovery milestones
 - New and substantial partnerships
 - Events or openings
 - Changes in leadership
- Conduct outreach to your targeted media list as follows:
 - Write a press release or e-mail pitch (stories of large or unique recoveries make better pitches than press releases)
 - Send a personalized e-mail summarizing the announcement, referencing relevant articles and pasting the press release below
 - Follow up with a phone call to gauge reporters' interest



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Step 3: When You Don't Have News...

- Keep in touch so that your project remains top of mind
 - Send an occasional e-mail about a successful recovery in a particularly complex case
 - Preview upcoming announcements and offer exclusive information
 - Cultivate personal relationships with your contacts (invite them to meals, send them holiday cards, etc.)
- Take advantage of national observances throughout the year


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Timing is Everything

January	February	March	April	May	June
			National Employee Benefits Day Spring Cleaning	Older Americans Month	
July	August	September	October	November	December
Anniversary of the Older Americans Act	National Senior Citizens Day Anniversary of Social Security	Labor Day 401K Day	International Day of Older Persons		



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Tools at Your Disposal

- How-to guides
- Template media materials
- Messaging framework
- Media lists
- Editorial calendars
- Monthly calls with National PARC to track progress
- Quarterly best practices conference call
 - Top two most successful outreach activities
 - One idea that did not work as well

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Media Outreach Discussion

- Can we clarify anything we have discussed thus far?
- How can National PARC help you build and sustain relationships with media moving forward?

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Moving Forward: Online Advertising & Outreach

- We understand that project websites are an increasingly significant source of referrals
- Drive traffic to the redesigned Pension Help America site – and increase traffic to your sites – through online advertising and outreach

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Online Advertising

- The Pension Rights Center has a Google AdWords program, which has contributed to the increased traffic on your sites
 - Consider creating and targeting your own ads by geography
 - Establish a budget and pay only when people click your ads
 - If your project has 501(c)(3) status, you may be eligible for free advertisements valued at up to \$10,000 per month



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Social Media Outreach

- Online outreach can help you to:
 - Build awareness of your project and its services
 - Increase your share of voice on pension-related issues
 - Build and sustain relationships with partners and media
- For example, the Pension Rights Center has launched a blog and a very active Twitter feed
- You can leverage and contribute to their social media presence in the following ways:
 - Author a guest post for the Perspectives blog
 - Suggest Twitter updates about your cases, partners and events

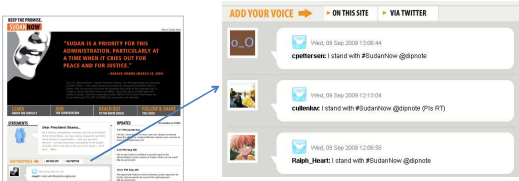
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Social Media Outreach

- If time and resources allow, you might also:
 - Develop your own Twitter and Facebook profiles
 - Create a blog specific to your project's work
 - Pull the Pension Rights Center Twitter feed into your website, so visitors see the latest updates in real-time



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Tools at Your Disposal

- How-to guides
- Existing Pension Rights Center social media properties
- Monthly calls with National PARC to track progress
- Quarterly best practices conference call
 - Top two most successful outreach activities
 - One idea that did not work as well

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Online Advertising & Outreach Discussion

- Can we clarify anything we have discussed thus far?
- How can National PARC help you engage in online outreach?

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Measurement

- It's important to quantify your outreach efforts to determine the return on investment. Track the number of...
 - **Organizational Partners:** Organizations contacted, meetings arranged, relationships established, links added, materials distributed, events attended or hosted, advisory committee members recruited and meetings held, resulting referrals
 - **Media Outreach:** Outlets contacted, meetings arranged, relationships established, announcements made, interviews requested, coverage secured, resulting referrals
 - **Online Advertising:** Click-through rate, resulting referrals
 - **Online Outreach:** Readers or followers, comments or replies, relationships established, resulting referrals

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Comments and Questions

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