



Launch and Rollout - Communications Plan Outline

Presentation to the NC ABLE Program Board of Trustees

January 17, 2017



NC ABLE Launch and Rollout – Primary Areas of Focus

1) Program Launch

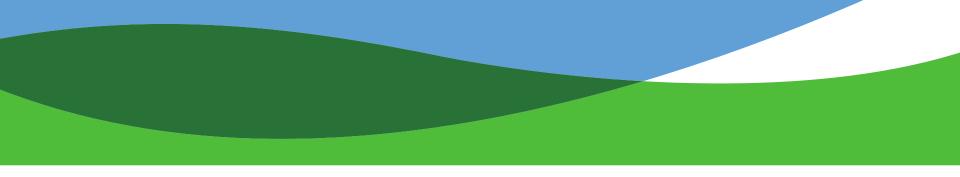
Phase I – "Soft" Launch Phase II – "Hard" Launch / Kick-off Phase III – Robust Marketing, Education and Outreach

2) Continued strategic marketing, communications and outreach in support of first-year and long-term goals



Goals in support of these Primary Areas of Focus

- 1) Education and Engagement Ensure the success of NC ABLE by engaging the public and educating potential participants and their families about the benefits of an NC ABLE account.
- 2) Enrollment Educate and inform on the enrollment process, dispel misunderstandings in the market place.
- 3) Contribution Introduce financial literacy concepts to this historically underserved population.



Primary Audiences

- 1) People with disabilities and their families/friends
- 2) Organizations and businesses that provide services and supports to individuals with disabilities and their families

To reach these groups, our activities should target:

- Media/Public
- Caregivers of people with disabilities (often parents or grandparents)
- Leaders in NC communities of people with disabilities / Leaders of NC associations that advocate for people with disabilities and NC nonprofits serving veterans/ VA
- Legislators and their staff members
- Financial services providers
- Businesses who provide services and supports to individuals with disabilities
- State and regional community groups and nonprofit organizations



Key messages

- 1) The NC ABLE Act is one of the most significant pieces of legislation ever passed in NC to <u>support independence for people with disabilities</u>. NC ABLE accounts have the potential to make a real and lasting effect on the financial security of individuals with disabilities.
- 2) NC ABLE accounts provide people with disabilities and their families <u>a new opportunity to</u> <u>save and plan</u> for a better economic future and improved quality of life. NC ABLE accounts are a *new* vehicle for saving in a tax advantaged account for many expenses related to living with a disability. Up to \$100K saved in this account would not be counted towards qualification for means-tested programs such as Medicaid.
- 3) NC ABLE accounts will <u>have the benefits of competitive pricing, institutional investment</u> <u>management and strong oversight</u> by the NC ABLE Program Board of Trustees.

Key Collaborators

- DHHS and other key state agency collaborators
- NC associations and organizations that advocate for people with disabilities (i.e. NC ARC, NCCDD, NC Down Syndrome Society, Autism Speaks, and many others). The NC ABLE Association Roundtable.
- National associations such as ARC of the US, National Disability Institute, Autism Speaks, National Down Syndrome Society, NISH/AFB, etc.
- Businesses that provide services to people with disabilities, especially transportation, housing, educational services, medical equipment providers, healthcare providers, hearing and vision care professionals
- Vocational rehabilitation providers and employment supports and services organizations
- Veterans Administration and non-profits that provide supports and services to veterans
- AARP and AARP volunteers
- Social Security Administration and other key agency leaders/personnel



• Schools including, community colleges and universities (especially financial aid professionals)



Timeline for Launch and Rollout

Phase I – "Soft" Launch – January, February and into March

- Media Release and Reponses/Interviews Jan 26
- National ABLE Alliance Press Conference, D.C., featuring consortium treasurers, Treasurer Folwell and Senator Burr
- Social media robust
- NDI NC webinar February
- NDI NC Train the Trainers March

↓

Phase II - "Hard" Launch - March and April

- Special Kick-off event with key stakeholders
- Advertising, media and direct marketing campaigns begin

Phase III – Enrollment and Informational events – April and throughout remainder of 2017

- Robust, targeted strategic outreach including advertising, media and direct marketing continues
- Community outreach community events, national and NC conferences
- Exhibiting and tabling with nonprofit partners and key stakeholders
- ABLE "Summit" and other special events
- Enrollment fairs (multiple) and opportunities