
SEPTEMBER 14, 2021

**AGENDA ITEM 4
INFORMATION ITEM**

CALIFORNIA ABLE ACT BOARD

Program 11 – Marketing Consulting Services

Background

The California ABLE Act Board issued a Request For Proposal, for a qualified marketing services firm to provide the Board with assistance with the development of marketing, communications and public relations services, including drafting a marketing plan to assist with the promotion of the Program; and provide the Board with program branding, design, and assistance with the planning of program related activities. The goal of obtaining these services is to increase the awareness of the CalABLE Program in California and nationally through marketing, branding, and outreach activities. These activities include a range of marketing approaches designed to educate and raise awareness among targeted consumer groups, including but not limited to adult individuals with disabilities, parents of disabled children and their families, service providers for individuals with disabilities, disability centric publications and media services of the Program, and ensure increased enrollments in Fiscal Years 2020-21, 2021-22, 2022-23, to be measured both quantitatively through enrollment in the program and qualitatively through education and outreach activities.

The marketing services firm will work at the direction of the Board through the delegated authority to the Executive Director to ensure that critical components of the Program are integrated into a comprehensive marketing/outreach effort, consisting of strategic marketing goals and approximately 17,000 participants enrolled in the program by the end of 2023. Program 11 was awarded the contract from July 1, 2021 until June 30, 2023 with a one-year option to extend.

Attachment

- Attachment #1 – Program 11 Presentation

Presenters

Kelly Doherty, Content and Marketing Strategist
Tom Foley, Executive Director of the National Disability Institute

[This page intentionally left blank]

Program 11 and NDI

Hello.

September 2021

About Us

Program 11 is an
LA-based strategic **brand**
and **content** agency.

National Disability Institute (NDI) **empowers**
people with disabilities and their families to build
a better financial future.



About Us

It's great to meet you.



Miriam Bookey, Head of Strategy



Kelly Doherty, Program Manager



Tom Foley - NDI
Subject Matter Expert



Michael Morris - NDI Subject Matter
Expert

Program 11 clients



NDI projects

NDI subject matter experts helped create and now run the ABLE National Resource Center. They are also implementing 15+ projects at a national, state and community level to change thinking and behavior of individuals, families, governments, corporations and nonprofit organizations to advance financial health, capability and inclusion of people with disabilities.

Project funders include:

- Citi Community Development
- Bank Of America
- Department Of Education, Rehabilitative Services Administration
- US Department Of Labor, Office Of Disability Employment Policy
- US Department Of Labor, Employment And Training Administration
- National Institute On Disability, Independent Living, And Rehabilitation Research

We're charged with using **heart** and **data** to help CalABLE grow

What we're doing for CalABLE

The heart.

We are journalists and storytellers who know that we inform and educate by first capturing attention and imagination. To that end, we're developing a content-driven inbound marketing plan with a new creative approach that matures and refines the work that's already been done.

We'll make sure we authentically and organically engage people with disabilities thanks to our partnership with NDI and their audiences.

We'll artfully and thoughtfully shift from "get to know us" (awareness) to "open an account" (conversion).

What we're doing for CalABLE

The data.

Our paid media partner comes from the world of running “white hat” political campaigns online. They are experts at efficiently targeting niche audiences, and they do it all above board and with integrity. Their process includes:

- Identifying key metrics of success
- Identifying the most effective channels and platforms
- Evaluating the most effective creative/messaging
- Analyzing previous trends and contextualizing them
- Trial runs of new channels
- Determining budget potential
- Audience targeting
- A/B testing of collateral across channels
- Optimization of audiences and targeting parameters
- Assessment of campaign efficacy
- Reporting on implications for short and long-term strategy

What we're doing for CalABLE

What's in the plan?

- Audience profiles (who they are, what they need, the messages that inspire them)
- Customer journeys (where they go for information, who and what influences them along the way)
- Paid and organic inbound marketing campaign strategy (email, website, social, etc.)
- Influencer outreach plan (including current and newly identified partners, ambassadors, and other natural evangelists of the program)

What we're doing for CalABLE

This isn't just about marketing

We're augmenting your team so that CalABLE can focus on the big picture.

We're your utility players, rolling up our sleeves to support on short term ad hoc requests while developing and readying the long-term strategic marketing plan.

And we're already authentically engaging people with disabilities thanks to our short term marketing plan and our partnership with NDI.

What we're doing for CalABLE

In the past two months, we have:

- Updated and redesigned CalABLE's webinar presentation to inspire action through compelling imagery, polls to capture audience data, and simplified messaging
- Amplified CalABLE's voice on social media with 3-5 posts per week
 - Fresh and timely content - #ABLEtoSave month and the Paralympics
 - Repurposed valuable evergreen content
 - Connected with Treasurer Ma's social team
- Met with partner orgs - TIAA, Options for All, and others
- Created new opportunities for account holders to share their stories
- Launched our first paid ad campaign to grow webinar participation

What we're doing for CalABLE

We are all about partnership.

- We're authentically engaging people living with disabilities thanks to working with NDI and their audiences.
- We're working closely with TIAA to align on their content and capabilities, ensuring we're harnessing the good work and amplifying where possible.
- We're working with Options for All, a California-based nonprofit serving adults with intellectual and developmental disabilities to bring their talents forward (with photo and video production, subject matter expertise, and other services that will benefit all)
- And we'll continually work with you, the Board, to ensure you are heard, that your questions are answered, and that all documentation is clear and accessible

Any questions?

September 2021

[This page intentionally left blank]