
JULY 9, 2024

**AGENDA ITEM 3
INFORMATION ITEM**

CALIFORNIA ABLE ACT BOARD

Marketing Strategy and Branding Update

Background

On April 24, 2024, the California ABLE Act Board (“Board”) authorized the Executive Director to enter into Agreement No. ABLE 04-23 with Program 11, LLC (“Program 11”) for marketing services for the California ABLE Program (“CalABLE” or “Program”). The contract period is from July 1, 2024, until June 30, 2027, with a two (2) one (1) year options to extend. Program 11 will work at the direction of the Board to ensure that critical components of the Program are integrated into a comprehensive marketing strategy, including an enrollment goal of 30,000 new funded accounts by June 30, 2027.

With the start of the contract, CalABLE staff will provide an update on marketing strategy and branding to further marketing objectives. This update will include information on:

- Targeted and tailored outreach planning
- Upcoming targeted campaigns
 - Parents
 - Employers and employees
 - Veterans
 - Age of eligibility increase in 2026
- Revisiting the logo and tagline

Presenter

Thomas Martin, Executive Director, California ABLE Act Board

This page is intentionally left blank.