



NC ABLE Program Board of Trustees Meeting November 19, 2019

Communications and Outreach Update



NC ABLE
National ABLE Alliance Member



Dale R. Folwell, CPA
STATE TREASURER OF NORTH CAROLINA
DALE R. FOLWELL, CPA

Q3 NC ABLE Outreach Highlights

Outreach

DHHS Division of Blind Services, Deaf/Blind Specialists ABLE Training
Metrolina Association for the Blind Conference Call
ARC of NC Training Module Distribution
STEM Career Fair at NC Natural History Museum
2019 NC Down Syndrome Conference

Training

LMS training module being pushed out to partners
Train-the-Trainer curriculum completed

Upcoming (this month)

Money Follows the Person (MFP) – Webinar
National Association of State Treasurers OpEd
Commemorating the 5th Anniversary of the ABLE Act, Washington DC

NC ABLE Materials Provided

Special Olympics of NC Competitions
Community-based magazines and partners across the state

Social Media

Organic Growth





12:00pm - 1:00pm
ABLE Act and Financial Planning

WEBINAR

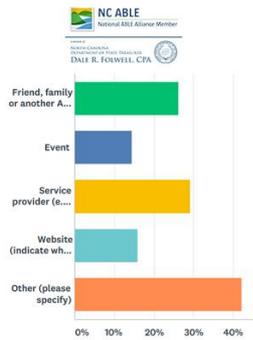
Hosted by
Mary Buonfiglio, CFA
Deputy Director of NC Supplemental Retirement Plans & NC Able Program

What is an NC ABLE Account?
How do I enroll and open an NC ABLE Account?
How do I use NC ABLE funds once deposited?
Discover other NC ABLE features, information and resources.

[Register](#)



Communication Strategy & Plan Highlights



NC ABE Survey

be able with NC ABE

Save for Your Future!

The NC Achieving a Better Life Experience (ABLE) Act allows people with disabilities to invest up to \$15,000 per year in tax-advantaged savings accounts, without impacting SSI or other support programs. NC ABE accounts are available for individuals at any stage of life with an onset of disability before turning 26 years of age.

 **NC ABE**
National ABE Alliance Member

 *Dale R. Folwell, CPA*
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nc.savewithable.com 888.627.7503

*Revise branding & messaging:
be able with NC ABE*

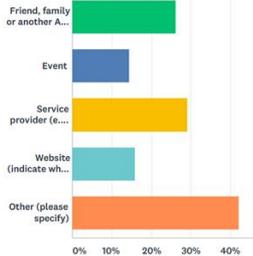
*2020 campaign launch:
The Power of 5*

*Partnerships & Outreach with local communities:
**government agencies, municipalities, employers,
businesses and non profits***

*Engage, educate & inspire:
Newsletters, real people stories, blog posts*

Outreach, partnerships and community efforts will be the focus for our new Communications Officer.

*O'Neill Communications will support our campaign directions with creative support:
social media, webinar production, graphics, with a priority placed on our Digital Toolkit for our Partnerships & Outreach efforts*



NC ABLE Survey

97% of respondents would recommend the NC ABLE Program to others.

33% of respondents use their NC ABLE account monthly.

91% of respondents found enrollment process to be fairly easy

79% of respondents find the investment options fitting with their goals and risk level.

How did you learn about NC ABLE?

Family, Friend or another ABLE account owner	26.09%
Event	14.49%
Service Provider (social worker, agency)	28.99%
Website	15.94%
Other	42.03%

Other includes: financial advisor, media, attorney, organizations, bank/credit union, job coaching agency

What is most important to our NC ABLE account owners?

(checking all that would apply, most important shown below)

Preservation of SSI and/or Medicaid	86.76%
Improved Financial Independence	76.47%

Comments: ease of access, being able to save without fear, greater flexibility than SNTrust, improved quality of life

What, if anything, would you change about the NC ABLE Program?

Comments: 1 out of 5 respondents said - Nothing – it is very well done and easy to use, happy so far and no issue. Other comments include: increase the maximum allowable amount per year, make depositing checks easier and more efficient, easier access to investment option statements

Who are our NC ABLE account holders?

Children, working adults, professionals, and families are all benefitting from NC ABLE.

“I work two part time jobs and now I can put some money away to my ABLE account instead of spend down”

“I'm one of four children and the second oldest. I have high functioning autism and am currently a freshman. I'm living in an apartment and learning to live independently.”

“Work part-time (about 25 hours per week), loves cats, videos, music.”

“I am disabled due to a brain injury that occurred when I was 13 years old in a vehicle accident. I am unable to work due to my short term memory. I am now 42 years old.”

NC ABLE Communications Strategy Outline

Goals in support of these Primary Areas of Focus

- **Education through engagement** – Engage the public through effective networking, editorial, social media, and PR placements with the goal to educate potential participants (and their families) about the benefits of ABLE and NC ABLE.
- **Enrollment** – Provide information on the enrollment process and NC ABLE account benefits/features. Dispel misunderstandings and provide information that makes individuals feel comfortable taking action.

Primary Audiences

1. People with disabilities, their families, and guardians
2. Organizations that provide services and supports
3. NC General Assembly
Priority: Public/Media, NC advocacy and membership associations, state and regional community groups, Legislators and their staffs
Secondary: Financial services providers, businesses who provide services and supports, legal services providers

Key messages

1. The NC ABLE Act is one of the most significant pieces of legislation ever passed in NC to support independence for people with disabilities. NC ABLE accounts have the potential to make a real and lasting impact on the financial security of individuals with disabilities, and their families.
2. NC ABLE accounts provide people with disabilities and their families a new opportunity to save and plan for a better economic future and improved quality of life, without losing needed supports from SSI, Medicaid, and other programs. NC ABLE accounts positively impact financial day-to-day challenges *and* provide an opportunity to save for the future.
3. Because North Carolina participates in the National ABLE Alliance, NC ABLE accounts have the benefits of competitive pricing, coupled with high quality institutional investment management. The NC ABLE Program Board of Trustees provides strong oversight of the NC ABLE Program.

A few of our key collaborators



National ABLÉ Alliance



Thank you



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