



NC ABL

National ABL Alliance Member

Launch and Rollout - Communications Plan Outline

**Presentation to the
NC ABL 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 support independence for people with disabilities. 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 a new opportunity to save and plan 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 have the benefits of competitive pricing, institutional investment management and strong oversight 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**