

**Zach Conine**  
*State Treasurer*



**Members**  
Donna Stanfel  
Robin Hager  
Michael Rankin  
Lisa Cano Burkhead

STATE OF NEVADA  
OFFICE OF THE STATE TREASURER

**PUBLIC MEETING**

**AGENDA**

MEETING OF THE BOARD OF TRUSTEES OF THE  
COLLEGE SAVINGS PLANS OF NEVADA

**Thursday, January 25, 2024, at 11:00 a.m.**

**Meeting via videoconference and at the following physical location:**

State Capitol Building  
101 N. Carson St.  
1<sup>st</sup> Floor State Treasurer's Office  
Carson City, NV 89701

Zoom Meeting Link:

<https://us06web.zoom.us/j/88416443710?pwd=4evuXbEXpMtjuaOUUnQdq0jGrL1ugv4.1>

Meeting ID: 884 1644 3710

Please email [Itzel.Fausto@nevadatreasurer.gov](mailto:Itzel.Fausto@nevadatreasurer.gov) for meeting password.

All items listed on this agenda are for discussion and action by the Board of Trustees unless otherwise noted. Action may consist of any of the following: approve, deny, condition, hold, or table.

**Agenda Items:**

1. **Roll Call.**

2. **Public Comment.**

Comments from the public are invited at this time. Pursuant to NRS 241.020(2)(d)(7), the Board intends to limit to 3 minutes the time for an individual to speak and may impose reasonable restrictions on place or manner for such comment. No restriction will be imposed based on viewpoint. Comment will only be received on matters relevant to the Board's jurisdiction. The Board may discuss but is precluded from acting on items raised during Public Comment that are not on the agenda.

## Discussion Agenda

3. **For discussion and possible action:** Board review and approval to contract with the following three (3) firms to provide marketing services.
  - a. The Abbi Agency
  - b. Davidson Belluso
  - c. Estipona Group
4. **Closed Session:** Board to enter into a closed session pursuant to NRS 241.015(3)(b)(2) with counsel to discuss the Putnam 529 for America contract.
5. **For discussion and possible action:** Board to direct State Treasurer staff to identify a solution to potential contractual issues as a result of the acquisition of Putnam Investments by Franklin Templeton.
6. **Public Comment.**

Comments from the public are invited at this time. Pursuant to NRS 241.020(2)(d)(7), the Board intends to limit to 3 minutes the time for an individual to speak and may impose reasonable restrictions on place or manner for such comment. No restriction will be imposed based on viewpoint. Comment will only be received on matters relevant to the Board's jurisdiction. The Board may discuss but is precluded from acting on items raised during Public Comment that are not on the agenda.
7. **ADJOURNMENT.**

Notes:

Items may be taken out of order; items may be combined for consideration by the public body; and items may be pulled or removed from the agenda at any time.

Prior to the commencement and conclusion of a quasi-judicial proceeding that may affect the due process rights of an individual, the Board may refuse to consider public comment. See NRS 233B.126.

The Nevada College Savings Board of Trustees is pleased to make reasonable accommodations for persons with physical disabilities. Please call (775) 684-5600 if assistance is needed.

Itzel Fausto may be contacted at (775) 684-5600 to obtain copies of supporting materials.

**THIS AGENDA HAS BEEN POSTED IN THE FOLLOWING PUBLIC LOCATIONS:**

- **Capitol Building, 1st & 2nd Floors, Carson City, Nevada**
- **Legislative Building, Carson City, Nevada**
- **Nevada State Library, Carson City, Nevada**
- **Blasdel Building, Carson City, Nevada**
- **Grant Sawyer Building, 1<sup>st</sup> and 5<sup>th</sup> Floor, Las Vegas, Nevada**

Also online at: [Nevada Treasurer](#) and the [Nevada Public Notice](#).

THE BOARD OF TRUSTEES OF THE  
COLLEGE SAVINGS PLANS OF NEVADA

**Agenda Item 3**  
**January 25, 2024**

**Item:**        **Board review and approval to contract with the following three (3) firms to provide marketing services.**

- a.            The Abbi Agency**
- b.            Davidson Belluso**
- c.            Estipona Group**

**Summary:**

On January 31, 2024, the Board’s current marketing contract will expire. In anticipation, the State Treasurer’s Office – College Savings Division worked with State Purchasing on soliciting proposals from qualified marketing firms identified under Statewide Master Service Agreement, 99SWC-S2340. Four firms were invited to provide presentations to Staff. Following presentations, three (3) firms were identified as the best fit to provide College Savings marketing services.

All three (3) firms will operate under the same scope of work and collaborate to provide various services to the Division, such as public relations, social media, and website design and maintenance.

Dr. Tya Mathis-Coleman, as well as representatives from The Abbi Agency, Davidson Belluso, and the Estipona Group, will be available for questions.

**Staff recommended motion:**

**Move to approve the three (3) firms to provide College Savings marketing services.**

**THE ABBI  
AGENCY**™



# Hi, we're The Abbi Agency



Certified



Corporation

We  
are

Creatives.

Media Mavens.

PR Perfectionists.

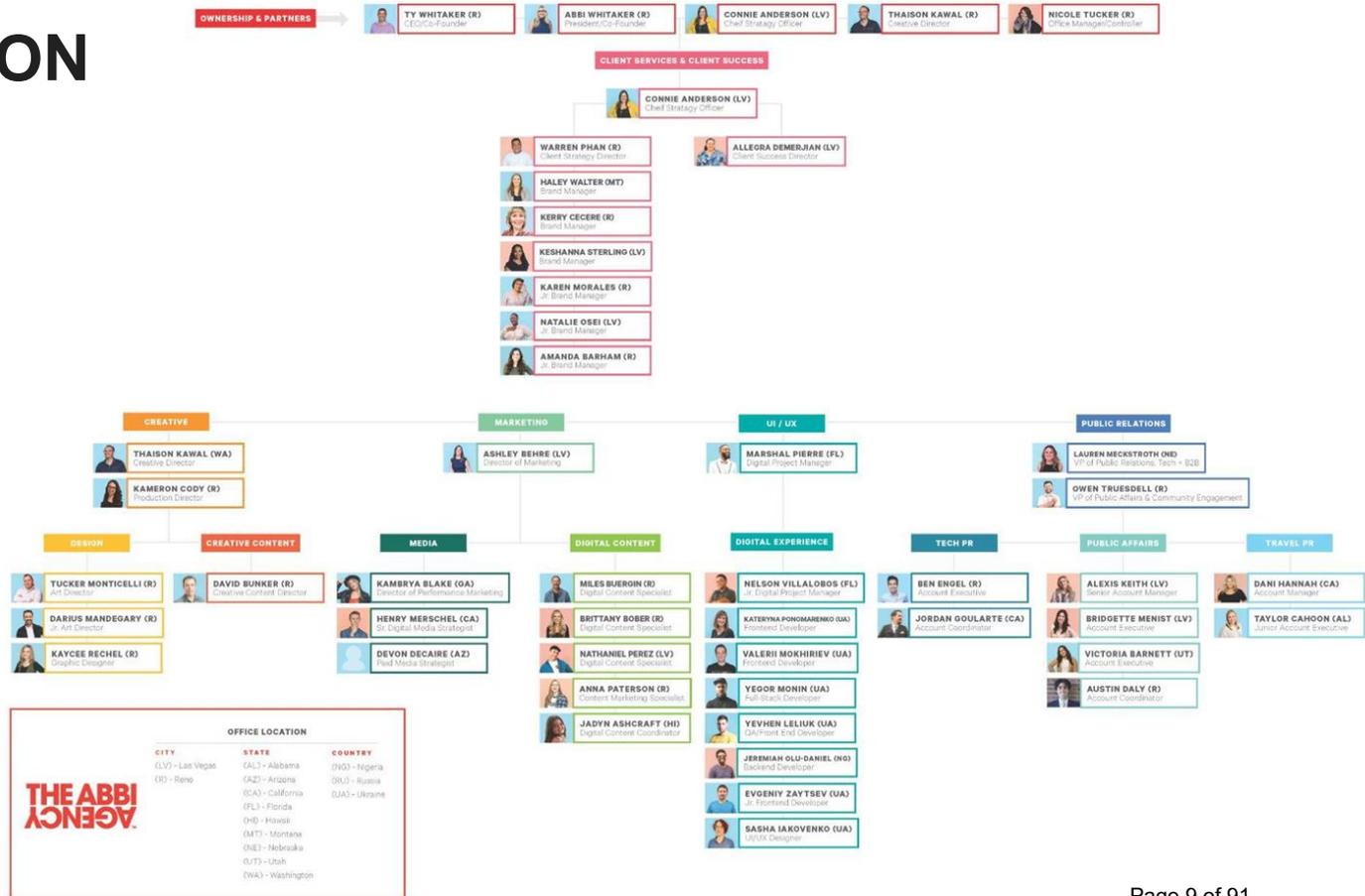
Movers and Shakers.

Industry Experts.

**Problem Solvers.**



# Our Team ORGANIZATION CHART





# Performance Driven Approach



# Performance-Driven Key Performance Indicators

## Evaluating Performance at Every Level



### AWARENESS

- Impression and Reach
- Share of Voice
- Mentions
- Website Traffic
- Search Volume
- Ad Recall
- Brand Perception
- Number of Placements



### ENGAGEMENT

- Engagement Rate
- Video Views
- Time on Content
- Bounce Rate
- Brand Equity



### CONVERSION

- Clicks-Through-Rate
- Form-Fills and Phone Calls
- Sign-Ups and Purchases
- Cost per Conversion
- Return on Ad Spend



### ADVOCACY

- Net New Followers
- Shares and Virality
- Sentiment
- Key Message Pull-Through
- Unique Views
- Domain Referrals

# Leveraging Data Analytics

## Analyzing Brand Performance

### Integrated Brand Audits & Ongoing Measurement

**Holistic look** – to see what audiences are saying about us, what we are saying about ourselves, and how the brand is experienced by audiences.

- **Public Relations** - share of voice compared to competitors; sentiment and key themes; influencer voices
- **Social Media** - top and low engaging content; audience sentiment; search intent; potential influencers; competitive opportunities
- **Website and Content** - competitive opportunities; usability and navigability; heat mapping and user experience testing; SEO strength and opportunities
- **Brand and Creative** - brand and creative perceptions; technical and competitive brand audits; brand positioning

### OUR TECH STACK

HubSpot

SEMRUSH

ahrefs

MUCK  
RACK

BuzzSumo

Screamingfrog

propel

mailchimp

Heepsy

CoverageBook

sproutsocial



# College Savings Division Primary Goals



Increase brand awareness -  
**Nvigate.gov**



Increase the number of Prepaid tuition accounts sold each open enrollment season.



Increase the claim rate for the College Kickstart Program along with the number of families that add to their account and start saving for college.



Improve overall engagement with families, institutions, and community partners.

# Situation Analysis

## Higher Education

### Hurdles and Trends:

- Economic challenges and pressures shift higher education priorities
- Language and cultural barriers
- Perception that investment in higher education is less worthwhile
- 8/10 self-report that it is important for their child to attend college
- Lack of awareness of NVigate programs and flexibility (4/5 report less than knew a lot about NVigate)



65%

**of jobs require post  
secondary education**



1/3

**Hispanic or Latino Race in  
Nevada, current students  
are majority minority**

# Target Audiences

## Main Audiences

### Audience: Parents

**Demo:** 25 - 44 yrs old (Elder Gen Z & Millennials), average household income \$35,000-\$99,999

**Pain Points:** High living expenses (inflation, childcare, rising tuition costs)

**Insight:** As digital natives managing a full calendar and commitments, this group has short attention spans and requires consistent and brief communications.

**Message:** A short investment of time now gives you peace of mind for your child's future.



# Target Audiences

## Main Audiences

### Audience: Grandparents

**Demo:** 55 - 64+ yrs old (Gen X & Boomers), average household income \$25,000-\$70,000

**Pain Points:** Unlikely to have graduated themselves, they understand the value of higher education, but do not understand the intricacies of how to support their family members through it.

**Insight:** With a high number of this group entering a form of retirement, they are digital converts that receive information through both traditional mediums and smartphones.

**Message:** Ensuring future generations' success begins now with an investment in their educational future.



# Target Audiences

## Audience Segment

### Audience: New to Nevada

**Demo:** All ages from main audiences

**Pain Points:** Want lower cost of everything, they don't know all the benefits to being a new Nevadan, they are inundated with information and unsure where to look

**Insight:** Likely chose Nevada due it a better cost of living, which implies added budget for saving monthly.

**Message:** Nevada is an affordable place to live in all aspects, with affordable tuition and a variety of college savings programs, your child can be set up for success now.



# Target Audiences

## Audience Segment

**Persona:** Spanish-Speaking Nevadans

**Demo:** All ages from main audiences

**Pain Points:** Less trust in the government and digital avenues, more apt to take care of situations as they happen

**Insight:** Messaging that culturally resonates

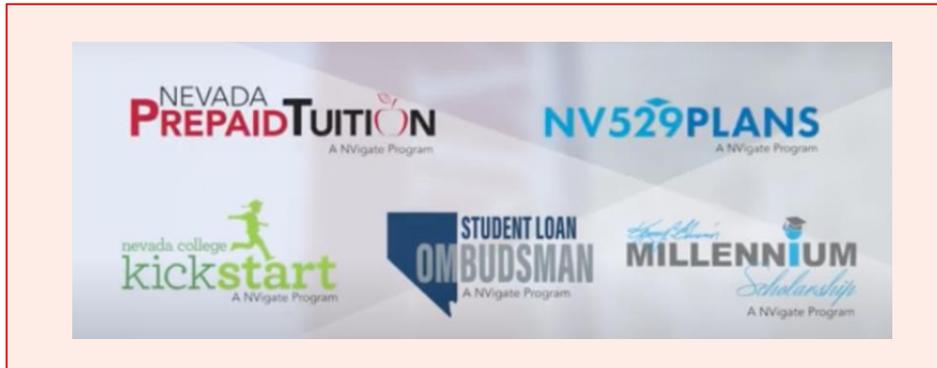
**Message:** Support future generations with the gift of higher education for the children in your life.



# Brand Audit and Opportunities

## Strategic Opportunities

- Numerous brands under the NVigate umbrella – opportunity to create cohesive brand guidelines document
- Shifting messaging to include “where should you get started” - ensuring messaging is personalized to their part of the journey and action oriented
- Personalized Messaging - heavy on parental messaging, does not include grandparents or others who often start a fund



**TAA TAA TAA**  
TM

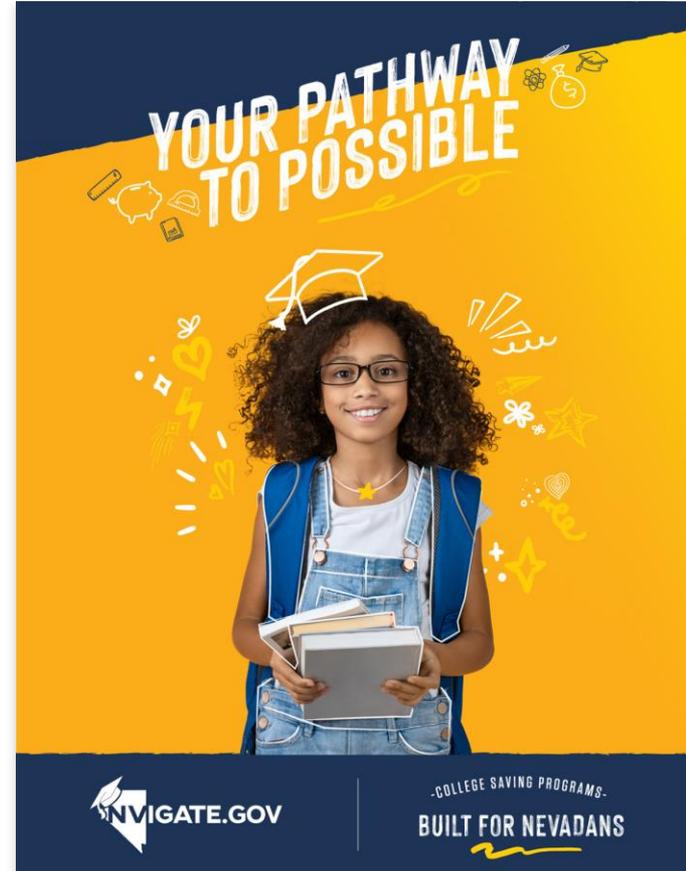
# CONCEPTS

**Creative**

# Your Pathway to Possible

With the rising costs of college enrollment, paying for four years of tuition can seem overwhelming to parents, perhaps even impossible. The “Your Pathway to Possible” campaign removes that mystique of inaccessibility, and shows how NVigate.gov dramatically lowers the financial barriers to college for Nevadans of all income groups and demographics. By showcasing the array of NVigate college savings options, this campaign empowers Nevadans to take control of their college savings plan, and grasp hold of a future where anything is possible.

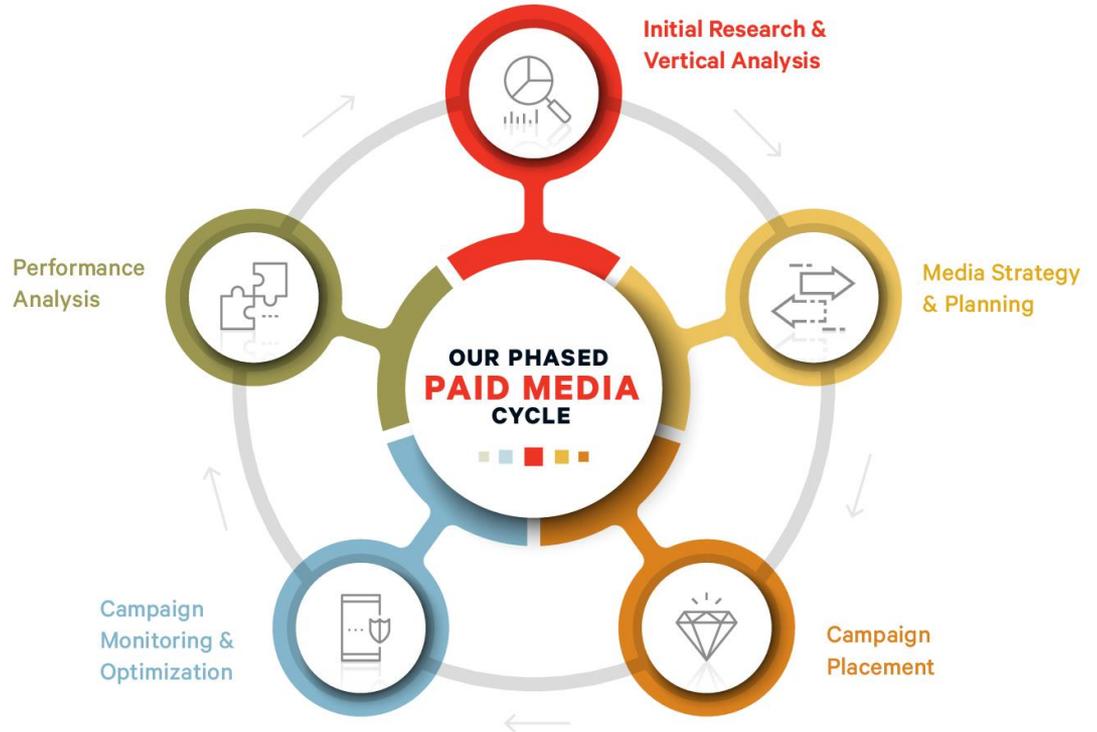
Using strategic targeting, customized messaging per demographic and psychographic and Spanish-language advertising creative, this campaign elevates the NVigate brand, inspires college savings plan enrollment and empowers Nevada parents and grandparents to invest now in the educational attainment of future generations.



# Phased Paid Media Approach

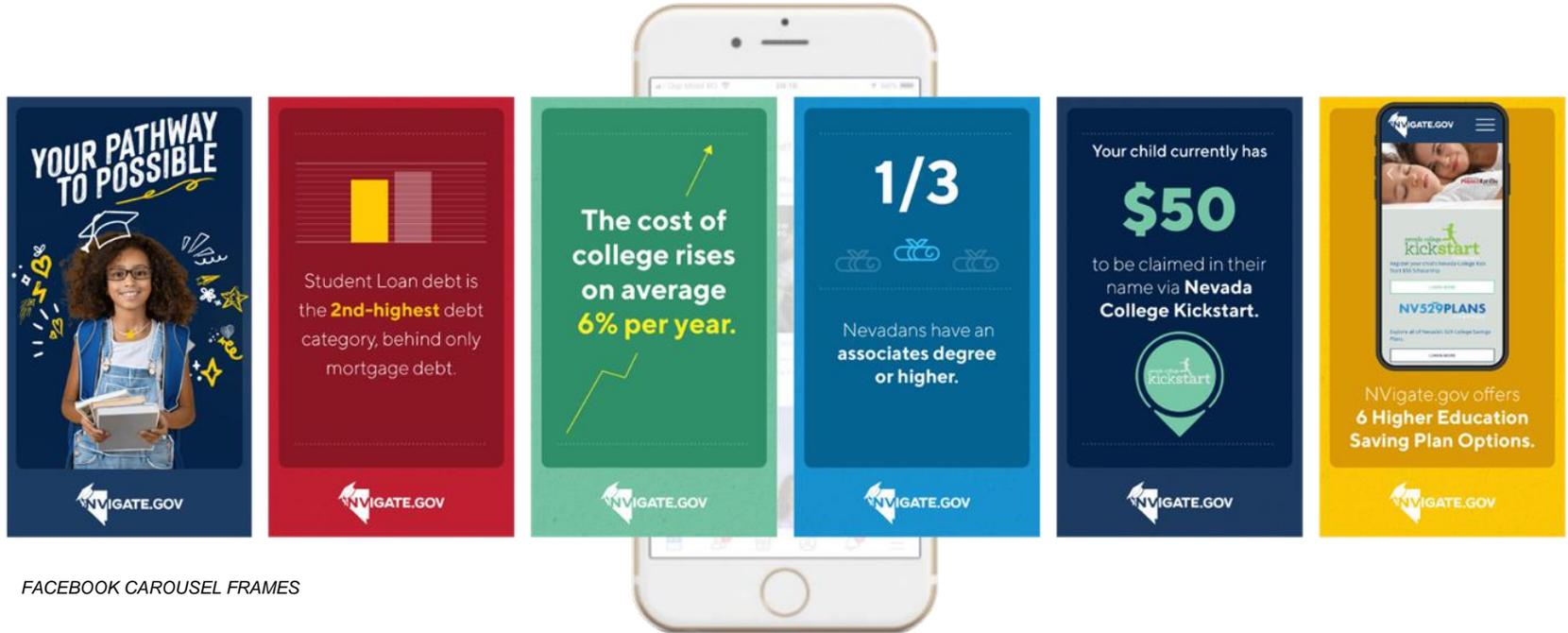
## Our Strategic Opportunities

- Spend across Nevada, with increased spend in Clark County
  - Study indicated higher level of awareness in Reno area
- Maintain focus on brand awareness
  - 58% in 2022 and 65% in 2021 reported “know nothing” about NVigate
- Social media and online ads result in high consistency and higher level of ad retention
- Omni-channel approach with sequential messaging
  - Initial target - awareness message
  - Retarget - additional information



# Creative Execution: Parents

- **Channels:** Stronger Digital Mix - Instagram, TikTok, Pinterest, Connected TV



FACEBOOK CAROUSEL FRAMES

# Creative Execution: Grandparents

- **Channels:** Traditional & Digital Mix, Facebook, Radio, Broadcast TV



# Creative Execution: New to Nevada

- **Channels:** Every Door Direct Mail, Zip Code and Local Magazines, School Program Communications, Digital Targeting & Retargeting

The direct mailer is split into two main color sections: a dark blue left side and an orange right side. The blue section contains the headline 'YOUR PATHWAY TO POSSIBLE' in large, white, hand-drawn letters, with a yellow swoosh underneath. Below this is the sub-headline 'YOUR NEW STATE WELCOMES YOU WITH COLLEGE SAVINGS PLANS THAT SAVE YOU MONEY' in white and yellow. A paragraph of text follows: 'From Prepaid Tuition to 529 Plans with big tax advantages and Kickstart Scholarships, NVigate is the place to find the best Nevada College Saving Plans.' At the bottom left of the blue section is the text 'START SAVING TODAY. SO YOU CAN CELEBRATE TOMORROW.' and 'NVIGATE.GOV' next to a QR code. The orange section features a dark blue banner at the top with the text '- COLLEGE SAVING PROGRAMS - BUILT FOR NEVADANS' and the NVIGATE.GOV logo. Below the banner is a photograph of a young girl with curly hair and glasses, wearing a blue backpack and holding books. The background around her is filled with white hand-drawn icons related to education and finance, such as a pencil, a graduation cap, a piggy bank, a lightbulb, and a dollar sign.

**YOUR PATHWAY TO POSSIBLE**

**YOUR NEW STATE WELCOMES YOU WITH COLLEGE SAVINGS PLANS THAT SAVE YOU MONEY**

From Prepaid Tuition to 529 Plans with big tax advantages and Kickstart Scholarships, NVigate is the place to find the best Nevada College Saving Plans.

**START SAVING TODAY. SO YOU CAN CELEBRATE TOMORROW.**

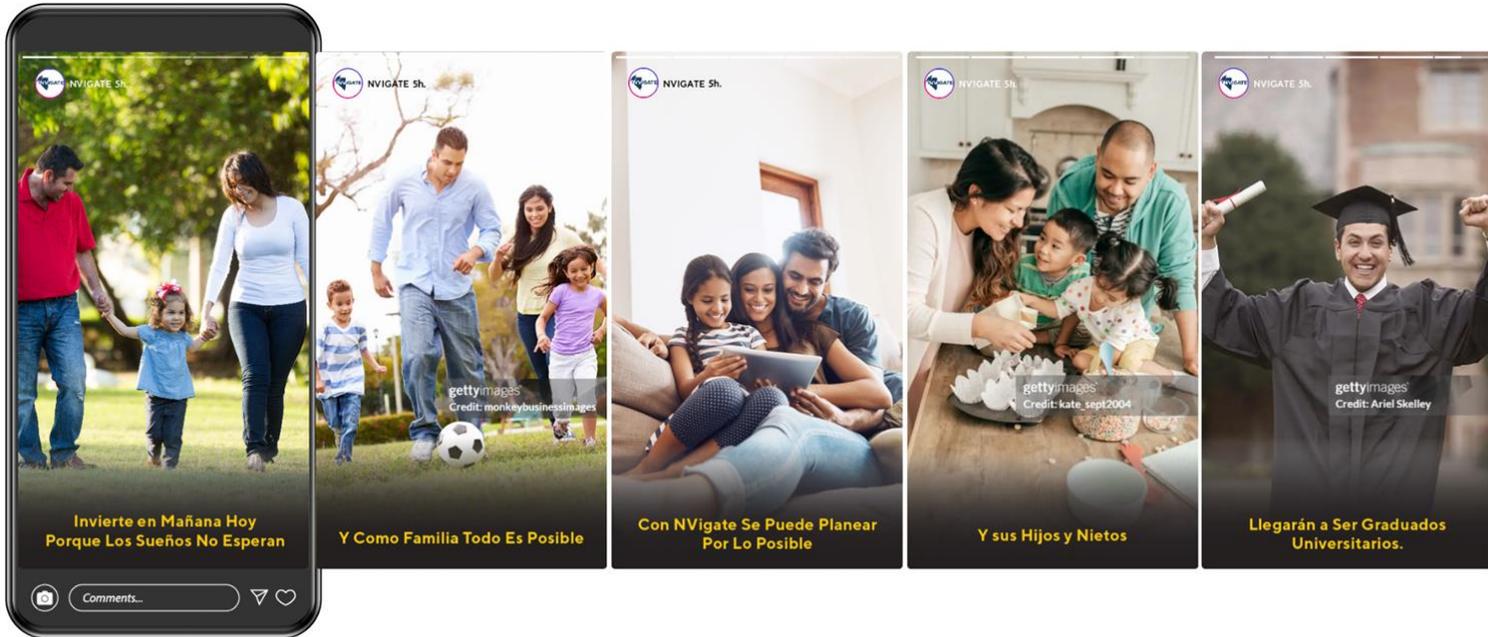
**NVIGATE.GOV**

**- COLLEGE SAVING PROGRAMS -**  
**BUILT FOR NEVADANS**

**NVIGATE.GOV**

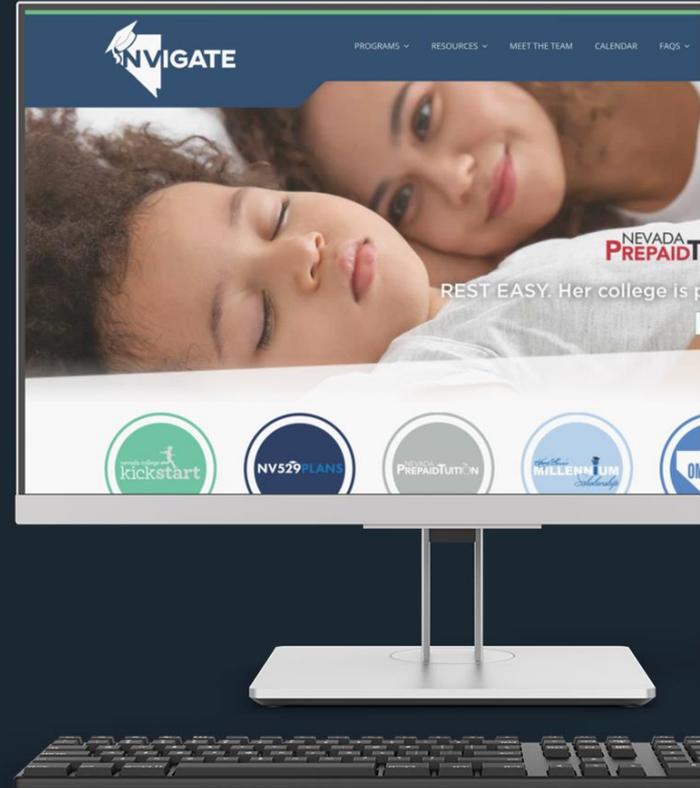
# Creative Execution: Spanish-Speaking

- **Channels:** Social Media Channels, Spanish Radio, Spanish Broadcast TV, Spanish Connected TV



# NVigate Website Audit

- Currently there are six above-the-fold CTAs at the same level of importance
- **On Homepage** - add “quick links” with links to key resources and/or FAQs, including resources in other languages and key dates
  - This assists in crawling from search engines, showcasing the breadth of information available on the website
- **On Homepage** - add “highlighted events” with upcoming events and/or recent webinar recordings; website is rich with this content
- Update Navigation that is more centered around the target audience journey.



# NVigate Website Opportunities

- Opportunity to possibly route visitors through an interactive process to understand where to start – cut down the overwhelm and confusion
- Craft Content focused on audience – who they are and where they are in the parenting journey, assisting visitors to self-select



CAMPAIGN LANDING PAGE

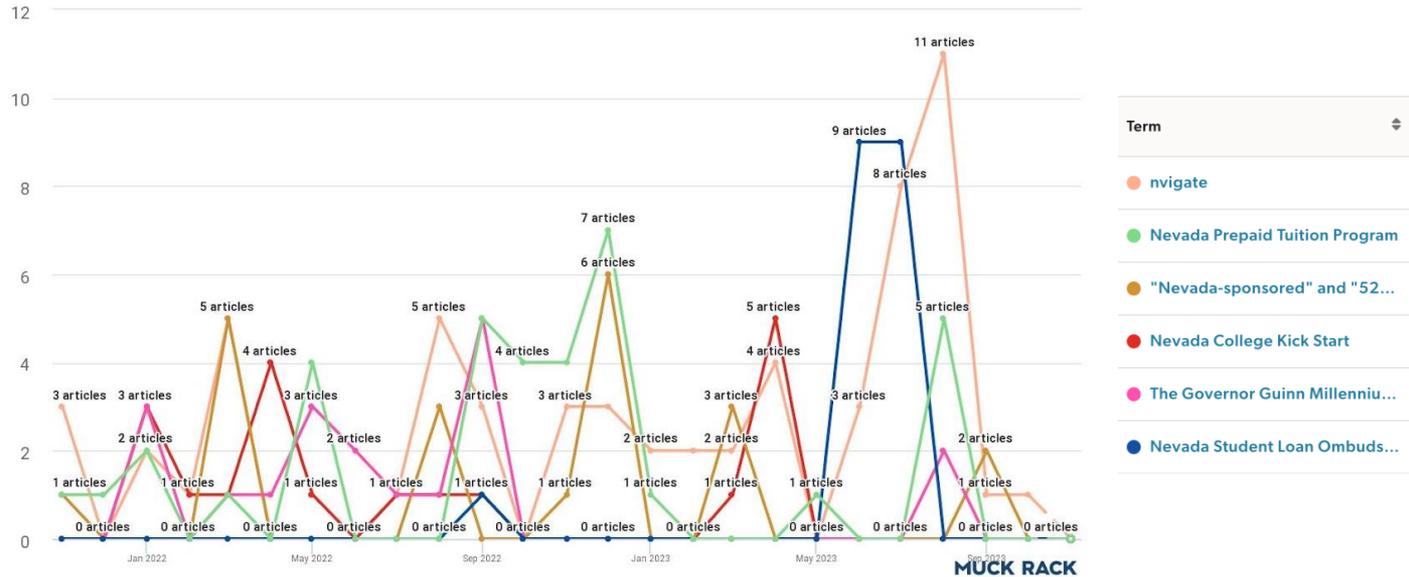


INTERACTIVE QUIZ



# PR Audit

Overall, the NVigate program received 60 total mentions over the past two years, with the highest spike in August 2023 with 11 articles.



# PR Opportunities

**LAS VEGAS  
REVIEW-JOURNAL**



**reno gazette journal**  
PART OF THE USA TODAY NETWORK



**2 NEWS**

## Strategic Opportunities

- **Newsjacking** - The price and value of postsecondary education is in the news at the local and national level. STO can leverage those news moments and insert itself into the conversation with a Nevada point of view and solution.
- **Create News Moments** - There is a rhythm to the news cycle, especially with news about higher education. STO can create an annual news moment that can serve to regularly highlight its programs and drive interest in its programs.
- **Leverage Your Data** - STO can generate earned media coverage by packaging data like the number of new savings programs started, geographic breakdowns and year-over-year trends with easily digestible graphics.

PR

# Opportunities

- **Discover Your Spokespeople** - Reporters are often looking for authentic stories and real people in the community to spotlight. The treasurer and current enrollees serve to be valuable testimonials to grow third-party buy-in.
- **Become an Expert, Nonpartisan Source of Guidance** - Parents, caregivers and families often find the process of saving for college daunting and confusing. STO should be a source of clear, trustworthy information about their options and how to navigate savings for college.



# Social Media Audit and Opportunities

## Strategic Opportunities

The State Treasurer's office has demonstrated great efforts on its various social media platforms. However, we have identified key findings and strategic opportunities that can further enhance its current efforts:

- **Utilize Hashtags on X (Twitter):**
  - Ex: #NevadaEducation, #NevadaTuition, #529Day
- **Update Instagram Story Highlights:**
  - Create a visual timeline of significant events through Instagram stories
  - Keep content relevant, and inform audiences.
- **Leverage Video Content on Instagram and Facebook:**
  - Generate higher engagement with dynamic video content
  - Lean into digital communities that best connect with your target audiences, i.e. [momtok](#), [Facebook](#)



# Social Media Audit and Opportunities

## Strategic Opportunities

The State Treasurer's office has demonstrated great efforts on its various social media platforms. However, we have identified key findings and strategic opportunities that can further enhance its current efforts:

- **Consistent Tagging/Mentioning Across Platforms:**
  - Increase visibility, create connections and engagement by tagging users.
- **Content Mix:**
  - Create content that drives inspiration, creativity, and emotion
  - Engage with appropriate viral trends - [Nevada Health Link](#)
  - Leverage partnership campaigns, i.e. Las Vegas-Clark County Library District, Nevada Universities
  - Drive relevancy by joining trending conversations, i.e. #HigherEducationDay, #WorldTeachersDay





# State of Nevada Experts and Enthusiasts

## NEVADA CLIENTS

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# Education Passion and Experience

## EDUCATION INNOVATION

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# Why The Abbi Agency?

We are a **performance-driven** marketing agency, rooted in ongoing optimization to reach real results.

We **specialize in Nevada** and have a true **statewide team**, enabling us to bring perspective, partnerships and support all across the state.

Our experience in Nevada paired with the **financial and educational industry** allow us to bring the perfect blend of **local knowledge** and **national know-how**.

We are **strategic, thoughtful and experienced**, and our **understanding of the local population** can help push you toward new audiences.



# QUESTIONS?

NEVADA STATE TREASURER'S OFFICE — COLLEGE SAVINGS DIVISION

# Public Relations, Advertising, Marketing, and Social Media Services

**Oral Presentation**



**PRESENTED BY:**

Davidson Belluso

**DATE:**

November 20, 2023

**DAVIDSON/BELLUSO**

Page 41 of 91

# Your leadership team.



**Mike Barcia**  
General Manager



**Bruce Nilsson**  
Chief Creative &  
Strategy Officer



**Gustavo Estrella**  
Director of  
Creative Services



**Christine Korecki**  
Director of  
Account Management



**Holly Silvestri**  
Partner/Co-Owner



**Latoya Bembry**  
Vice President of  
Strategic Communications

# Agenda

- **Agency Overview**
- Why Us?
- Audit for Actionable Intelligence
- Key Opportunity/Creative
- Metrics
- Summation

# We're just your friendly, local, national agency.

DAVIDSON BELLUSO AT A GLANCE



Established in 2001



Southwestern focused agency with offices in NV, AZ and UT



Certified Woman Owned Business National Council (WBENC)



Full-service marketing, advertising and PR



## The value to the D/B/Ferraro Group relationship.



- Ability to reach all corners of NV
- Offices in LV, Reno, Carson City



- Community partners with shared values
- Youth, family, schools, financial health



- Strong media relationships

# Agenda

- Agency Overview
- **Why Us?**
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# Masters in 529 Education Savings Program Marketing.



**7**

**years**

partnership  
with AZ529



**39%**

**increase**

in new AZ529 accounts  
(32,775 new accounts open)



**18.3%**

**increase**

in plan assets  
(up to \$1.92 billion)



**504%**

**increase**

in essay contest  
submissions



**71%**

**increase**

in art contest  
submissions

# AZ529's Success Earns Recognition.

**AZ529, Arizona's Education Savings Plan**  
*upgraded to*  
**Silver Medalist Rating**  
Morningstar 529 Ratings



**AZ529**  
ARIZONA'S EDUCATION SAVINGS PLAN  
TREASURER KIMBERLY YEE



KIMBERLY YEE  
OFFICE OF THE STATE TREASURER ARIZONA  
SAFETY BEFORE LIQUIDITY BEFORE YIELD

# Agenda

- Agency Overview
- Why Us?
- **Audit for Actionable Intelligence**
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 NVIGATE.GOV

## Marketing:

- Clarity on what NVigate 'is'
- Clarity on programs
- Design and narrative impact



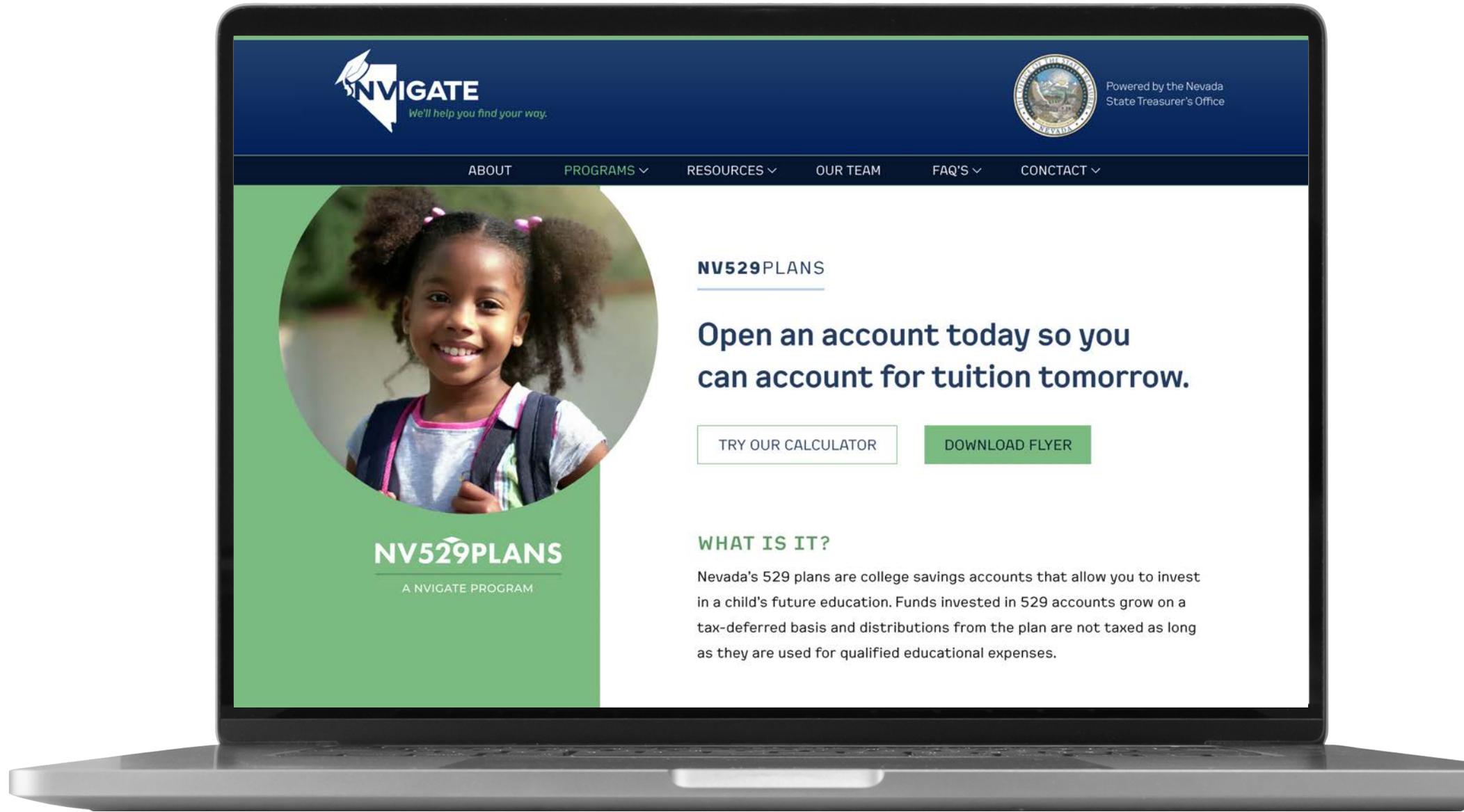
# Agenda

- Agency Overview
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DRAMATIC  
CLARITY  
AND COHESION:  
NVIGATE



DRAMATIC  
CLARITY  
AND COHESION:  
NVIGATE



DRAMATIC  
CLARITY  
AND COHESION:  
NVIGATE



Lost on how to  
avoid college debt?

**We'll help you find your way.**

Higher education should be a realistic option for every Nevadan. **NVIGATE** is your resource for planning, saving & paying for higher education. It's never too soon to start saving for college.

**Contact us today!**

(888) 477-2667 (Toll Free)  
collegesavings@nevadatreasurer.gov  
nvgate.gov



DRAMATIC  
CLARITY  
AND COHESION:  
NVIGATE



Lost on how to start  
saving for college?

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DRAMATIC  
CLARITY  
AND COHESION:  
NVIGATE



Lost on student  
loan options?

We'll help you find your way.

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nvgate.gov



Powered by the Nevada  
State Treasurer's Office

DRAMATIC  
CLARITY  
AND COHESION:  
NEVADA PREPAID  
TUITION



## Cap the cost of a college education.

Families can lock in future college tuition at today's rates in as little as 15 minutes and \$42 a month.

NEVADA  
**PREPAID TUITION**

A NVIGATE PROGRAM

**NVIGATE** is your resource for planning, saving & paying for higher education. It's never too soon to start saving for college.

**Contact us today!**

[nvgate.gov/programs/nevada-prepaid-tuition](https://nvgate.gov/programs/nevada-prepaid-tuition)



*We'll help you find your way.*

Powered by the Nevada State Treasurer's Office

DRAMATIC  
CLARITY  
AND COHESION:  
NEVADA PREPAID  
TUITION



As tuition costs keep growing, so will your smile.

Families can lock in future college tuition at today's rates in as little as 15 minutes and \$42 a month.

NEVADA  
**PREPAID TUITION**

A NVIGATE PROGRAM

**NVIGATE** is your resource for planning, saving & paying for higher education. It's never too soon to start saving for college.

**Contact us today!**  
[nvgate.gov/programs/nevada-prepaid-tuition](http://nvgate.gov/programs/nevada-prepaid-tuition)



DRAMATIC  
CLARITY  
AND COHESION:  
THE NEVADA  
COLLEGE KICK  
START PROGRAM



\$50 says you can start  
saving for college.

When it comes to paying for college, every kid deserves a kickstart.



**NVIGATE** is your resource for planning, saving & paying for higher education.  
It's never too soon to start saving for college.

**Contact us today!**  
[nvgate.gov/programs/nevada-college-kick-start](https://nvgate.gov/programs/nevada-college-kick-start)



DRAMATIC  
CLARITY  
AND COHESION:  
THE NEVADA  
COLLEGE KICK  
START PROGRAM



So they grow up owing only  
a debt of gratitude.

When it comes to paying for college, every kid deserves a kickstart.



**NVIGATE** is your resource for planning, saving & paying for higher education.  
It's never too soon to start saving for college.

**Contact us today!**  
[nvgate.gov/programs/nevada-college-kick-start](http://nvgate.gov/programs/nevada-college-kick-start)



DRAMATIC  
CLARITY  
AND COHESION:  
NV529 PLANS



Money doesn't grow  
on trees. It grows here.

It's never too soon to start saving for college. Start saving today.

**NV529PLANS**

A NVIGATE PROGRAM

**NVIGATE** is your resource for planning, saving & paying for higher education.  
It's never too soon to start saving for college.

**Contact us today!**  
[nvgate.gov/programs/nevadas-529-plans](https://nvgate.gov/programs/nevadas-529-plans)



Powered by the Nevada State Treasurer's Office

DRAMATIC  
CLARITY  
AND COHESION:  
NV529 PLANS



It'll save the day,  
years from now.

It's never too soon to start saving for college. Start saving today.

**NV529PLANS**

A NVIGATE PROGRAM

**NVIGATE** is your resource for planning, saving & paying for higher education.  
It's never too soon to start saving for college.

**Contact us today!**  
[nvgate.gov/programs/nevadas-529-plans](https://nvgate.gov/programs/nevadas-529-plans)



DRAMATIC  
CLARITY  
AND COHESION:  
NV529 PLANS



Be the  
grandest of  
grandparents.

Celebrate National Grandparent Day  
by opening an NV529 account!

**NV529PLANS**



Powered by the Nevada State Treasurer's Office



Be sure to stuff  
your NV529  
account, too.

Start saving today at [NVIGATE.GOV](https://www.nvigate.gov).

**NV529PLANS**



Powered by the Nevada State Treasurer's Office



You add.  
We'll multiply.

Take the contribution challenge  
at [NVIGATE.GOV](https://www.nvigate.gov).

**NV529PLANS**



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DRAMATIC CLARITY AND COHESION: NV529 PLANS

## Leveraging Public Relations

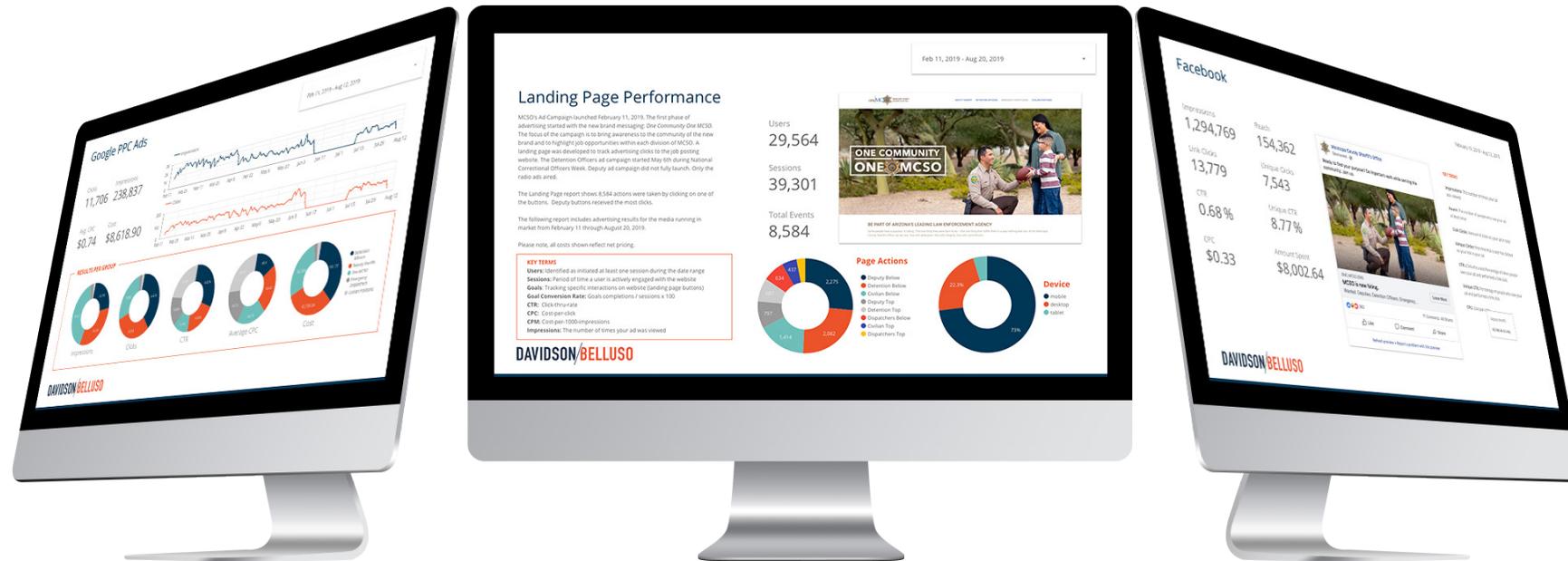
- Meet them where they're at
- Statewide schools and Boys & Girls Club outreach – interactive activities – media/social media worthy
- Require winners from all counties, schools (public, homeschool, tribal)
- Become stronger media partners, send B-roll, in-studio tips segments, flexibility
- Enhance existing NV programs – March Madness = [Diaper Derby at UNLV](#)
- Partner with influencer - “Unbox a Future Career”, they explain NV savings programs
- College question social media challenge (“Kindergartener vs. College Freshman”) - How much does college cost?
- Highlight trade and technical school pathways - “Most Interesting Jobs”, Treasurer on the job as crane operator, motorcycle mechanic, electrical lineperson, etc. for social media videos and news segments

# Agenda

- Agency Overview
- Why Us?
- Audit for Actionable Intelligence
- Key Opportunity/Creative
- **Metrics**
- Summation

# Data to drive decision making.

- Define success early
- Digital Dashboard (customized, confidential)
- Monthly tracking reports
- Real-time analytics (clicks, CTR, conversions, social platforms, creative, location, more)
- Recommended changes/adjustments



# Summation

- Previous Experience
- Partnerships
- Process
- Passion
- Performance

## GOVERNMENTAL AGENCY EXPERIENCE



## DAVIDSON BELLUSO PARTNERSHIPS



# Q & A



Be sure to stuff your NV529 account, too.

Start saving today at [NVIGATE.GOV](https://nvgate.gov).

## NV529PLANS



Powered by the Nevada State Treasurer's Office



**NVIGATE**  
We'll help you find your way.

Powered by the Nevada State Treasurer's Office

ABOUT PROGRAMS RESOURCES OUR TEAM FAQ'S CONTACT

### NV529PLANS

Open an account today so you can account for tuition tomorrow.

[TRY OUR CALCULATOR](#) [DOWNLOAD FLYER](#)

#### WHAT IS IT?

Nevada's 529 plans are college savings accounts that allow you to invest in a child's future education. Funds invested in 529 accounts grow on a tax-deferred basis and distributions from the plan are not taxed as long as they are used for qualified educational expenses.



Cap the cost of a college education.

Families can lock in future college tuition at today's rates in as little as 15 minutes and \$42 a month.

**NEVADA PREPAID TUITION**  
A NVIGATE PROGRAM

NVIGATE is your resource for planning, saving & paying for higher education. It's never too soon to start saving for college.

Contact us today!  
[nvgate.gov/programs/nevada-prepaid-tuition](https://nvgate.gov/programs/nevada-prepaid-tuition)



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**NVIGATE**  
We'll help you find your way.

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ABOUT PROGRAMS RESOURCES OUR TEAM FAQ'S CONTACT

### NVIGATE

Your resource for **planning, saving & paying** for higher education.

[START HERE](#) [DOWNLOAD FLYER](#)

#### OUR PROGRAMS

[nevada without a kickstart](#) [NV529PLANS](#) [NEVADA PREPAID TUITION](#) [the millionaire scholarship](#) [STUDENT LOAN ON BUDSMAN](#)

Thank You

# Hello, State Treasurer's Office!

Thanks for having us.

**At its core, NVigate  
is about creating  
opportunity for all  
Nevada's children.**

**Let's give them the best chance  
at success.**



# Case Studies



immunize  
nevada

# Case Study: 3 Million Reasons

## Immunize Nevada COVID-19 Campaign

**Goal:** Convince eligible Nevadans to  
get a COVID-19 vaccine



# Case Study: 3 Million Reasons

## Immunize Nevada COVID-19 Campaign

### Relevance to ST0:

- Broad statewide reach
- Sophisticated targeting with differentiated messaging based on language, culture, political orientation, ethnicity
- Educate, establish credibility, motivate action



# Case Study: 3 Million Reasons

## Immunize Nevada COVID-19 Campaign

### Results:



The logo features the word "vaxx" in a stylized, rounded font with a purple-to-blue gradient and a white outline. The final two 'x's are replaced by a white bandage with a blue border and a grid of small blue dots. Below this, the words "NEVADA" and "DAYS" are stacked in a bold, blue, sans-serif font with a white outline.

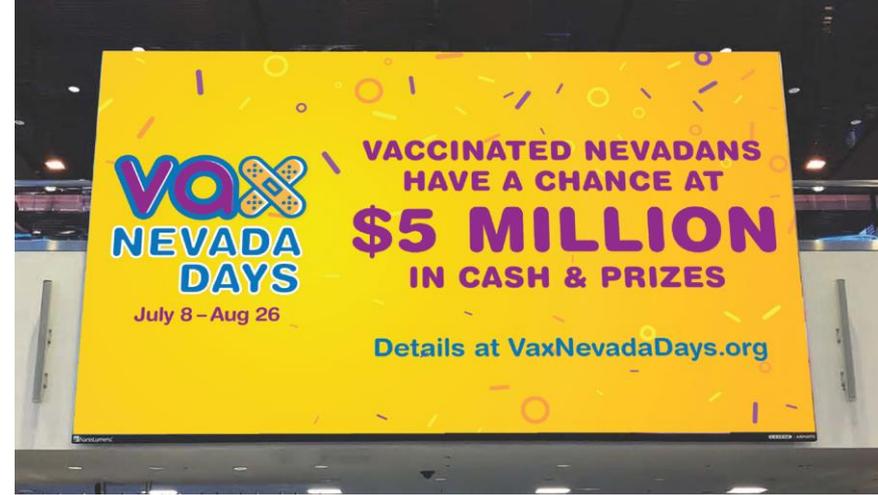
**vaxx**  
**NEVADA**  
**DAYS**

**July 8 - August 26**

# Case Study: Vax Nevada Days

## Nevada Health Response Statewide Campaign

**Goal:** Set up, promote and run a statewide, 8-week vaccine promotion

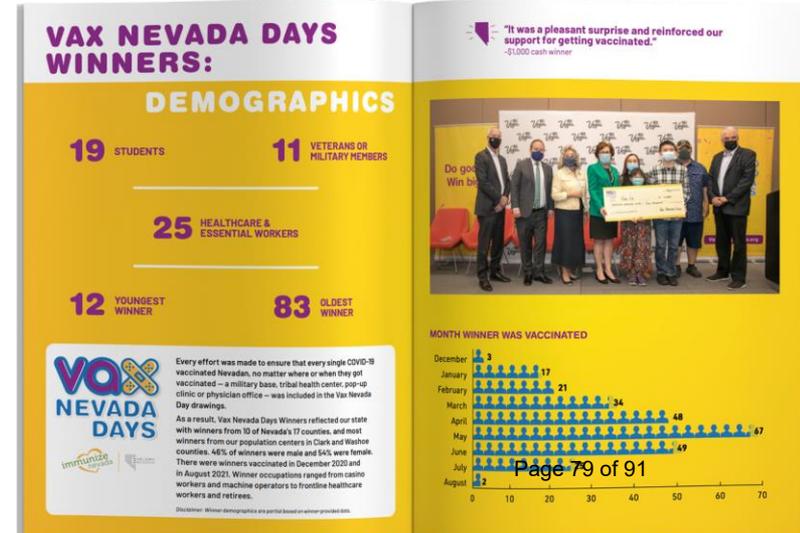


# Case Study: Vax Nevada Days

## Nevada Health Response Statewide Campaign

### Relevance to STO:

- Event-focused
- Broad statewide reach
- Collaboration with 24 partners in government and private business
- First-hand experience educating Nevadans about 529 plans



# Case Study: Vax Nevada Days

## Nevada Health Response Statewide Campaign

### Results:

**440,988**

COVID-19 vaccine doses administered in the 8-week promo

**2 dozen+**

Partners in government and private business

**\$5M**

Given away in cash and prizes

**108**

Press stories in print, online and broadcast media

**6.7M+**

Ad impressions



# Case Study: Youth Suicide Prevention

## Hope Means Nevada / SilverSummit Healthplan Campaign

**Goal:** Reduce Nevada youth suicide attempts by connecting low-income families with free mental health resources



# Case Study: Youth Suicide Prevention

## Hope Means Nevada / SilverSummit Healthplan Campaign

### Relevance to ST0:

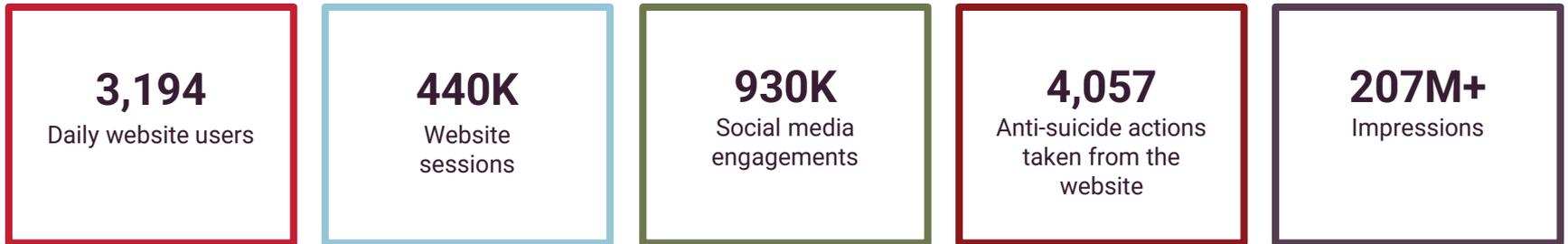
- Reach underserved Nevada populations
- Target and differentiate messages for youth and parents, in English and Spanish
- Communicate with people where they are



# Case Study: Youth Suicide Prevention

## Hope Means Nevada / SilverSummit Healthplan Campaign

### Results:



**Opportunities  
are everywhere**

## Opportunity:

# NVigate.gov

- Clarify NVigate brand
- Use accessible language
- Enhance program detail
- Add participant testimonials
- Add radio episodes
- Address accessibility and UI/UX issues
- Search Engine Optimization (SEO)



# Opportunity: Outreach

- Create relatable testimonials
- Programmatic advertising
- Reframe prepaid tuition language
- Influencer campaigns
- Education as ultimate gift



# Opportunity: Partnerships

NVigate is the pathway to higher education with deep impact across the State, offering rich opportunities for collaborations.





**Class dismissed!**

**Thank you.**

**Estipona Group Contact:**

**Nicole Rose Dion**

Account Director

[nicole@estiponagroup.com](mailto:nicole@estiponagroup.com)

775.624.3587



THE BOARD OF TRUSTEES OF THE  
COLLEGE SAVINGS PLANS OF NEVADA

**Agenda Item 5**  
**January 25, 2024**

**Item: Board to direct State Treasurer staff to identify a solution to potential contractual issues as a result of the acquisition of Putnam Investments by Franklin Templeton.**

**Background:** On January 1, 2024, Franklin Templeton acquired Putnam Investments, which serves as the Program manager for the Board's Putnam 529 for America ("Plan") nationwide advisor-sold 529 plan.

**Issue:** New Jersey's 529 College Savings Plan, NJBEST, is managed and distributed by Franklin Distributors, LLC, an affiliate of Franklin Resources, Inc., which operates as Franklin Templeton.

NJBEST is a nationwide advisor-sold 529 plan. Franklin Templeton's contract with New Jersey includes an exclusivity clause which does not allow for a competing 529 plan to be sold nationwide under the Franklin Templeton umbrella.

**Staff Recommendations:**

Staff is recommending the Board direct Staff to work with Franklin Templeton, Putnam Investments, AKF Consulting, and Meketa to identify a solution that best protects future and existing participants in the Putnam 529 for American Plan. Such a solution may include, but not be limited to: Plan restructuring or contractual termination and Plan conversion. The proposed solution will be provided to the Board at a subsequent meeting for review.

**Staff recommended motion:**

**Move to direct Staff to work with Putnam Investments, AKF Consulting, and Meketa to identify a solution to potential contractual issues as a result of the acquisition of Putnam Investments by Franklin Templeton. A solution will be identified and brought forth to the Board at a subsequent meeting.**