Welcome

Federal Legislation Update & Media Tips

Monday, December 10, 2019
Update

• Fourth of Five webinars for New Treasurers and their staff

• Archives available

• Please submit questions about this or other webinars, or other issues. We are here to assist with the transition.
NAST Advocacy

• Member Benefit
• Federal Legislative Committee and for each Network
• Federal Relations Tab on Website
• Policy Process
  • Resolutions on
    • ABLE Savings Accounts
    • Banking and Cash Management
    • College Savings/529
    • Cyber Security
    • Financial Education
    • Infrastructure
    • Pensions and Retirements
    • Public Finance
    • Unclaimed Property
Introductions

• Williams and Jensen, NAST’s advocacy consultants
  • Matthew Hoekstra, Principal and advocacy expert

• Marathon Strategies, NAST’s media consulting firm
  • Jane Hardey, Managing Director and Chief Operating Officer
  • Sunny Mehta, Senior Communications Associate
Federal Relations Priorities

• Tax
  • Municipal Financing
  • 529 College Savings
  • 529A ABLE Plans

• Financial Services & Banking
  • Regulatory Policy
  • Financial Literacy

• Infrastructure

• Unclaimed Property

• Intergovernmental Relations
  • Enhancing ties with federal delegation
Federal Tax Policy

• Critical to many NAST priorities
• Overview of impact on municipal financing
  • Changes in Tax Cuts and Jobs Act
• Overview of 529 and ABLE Policy
  • Recent federal policy developments
  • Successes/challenges/opportunities
• Engagement with key policymakers
• 2019 key issues and advocacy strategy
Banking and Financial Services

• Expertise of Treasurers and Treasury/ Governmental Staff

• Federal banking regulators

• Recent advocacy successes

• 2019 key issues and engagement
  • Municipal Finance
  • Financial Literacy
Infrastructure

• A bipartisan breakthrough in 2019?

• Role of States/Treasurers

• Overview of key policymakers

• Advocacy strategy
Unclaimed Property

• Many different areas of US Code impact state unclaimed property programs

• US Savings Bonds

• Other Federal policy considerations
Intergovernmental Relations

• Advisory Committee to Speaker’s Task Force on Intergovernmental Relations

• President Pearce’s Testimony

• Leveraging February Conference

• Strengthening ties with your Congressional delegation

• Opportunities for intergovernmental engagement in 2019
Questions?

• Submit through the webinar site
Understanding the Media

Best Practices from NAST and Marathon Strategies
**Areas of Engagement**

<table>
<thead>
<tr>
<th>Advocacy</th>
<th>Thought Leadership</th>
<th>Milestones</th>
</tr>
</thead>
</table>

**Advocacy**

Congress reclassifies US muni bonds, likely to lower borrowing costs

“Lawmakers have taken concrete action to lower borrowing costs and better position states to invest in infrastructure projects at the state and local level,” said Beth Pearce, Vermont state treasurer and president of the National Association of State Treasurers, in a statement after Tuesday’s vote in the House.

---

**Thought Leadership**

The average U.S. 529 college savings plan has $24,153 in it, a record high.

---

**Milestones**

It’s Disability Employment Awareness Month: ABLE to Work helps Americans with disabilities
## What Do Journalists Want?

<table>
<thead>
<tr>
<th>Novelty/Change</th>
<th>Drama/Conflict/Conspiracy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facts/Substance</td>
<td>Character/Color</td>
</tr>
<tr>
<td>Timeliness</td>
<td>Relevance</td>
</tr>
<tr>
<td></td>
<td>Relevance</td>
</tr>
<tr>
<td></td>
<td>Significance</td>
</tr>
</tbody>
</table>
Communications Theory

- Message/Content
- Tone/Voice & Language
- Appearance/Body Language
Understanding Print Structure
### Understanding Broadcast

<table>
<thead>
<tr>
<th>Radio</th>
<th>Television</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keep Statements Short</td>
<td>Perception Medium</td>
</tr>
<tr>
<td>Use Plain Language</td>
<td>High on Performance Relatively Low on Facts/Information</td>
</tr>
<tr>
<td>Step Up Energy Levels</td>
<td>Body Language Is Crucial</td>
</tr>
<tr>
<td>Colorful, Familiar Anecdotes and Examples</td>
<td></td>
</tr>
</tbody>
</table>
Controlling the Message

Overarching Key Message

Supporting Message One
Proof Points

Supporting Message Two
Proof Points

Supporting Message Three
Proof Points
Interviewer Tactics

1. Feed You a Line
2. False Sense of Security
3. Speed You Up
4. Lure You Off Point
5. Silence
The Seven Deadly Questions

1. False Premise
2. Embedded False Premise
3. The Hypothetical
4. The Absent Third Party
5. The 100-Percent Guarantee
6. The Multiple Choice
7. The “Gotcha”

Be a Spokesperson, not an Answer-Person
Q: It seems that you and the governor are increasingly at odds over the implementation of the remote sales tax. Do you see this becoming an issue moving forward?

A: Both the governor and the treasurer’s office are committed to the same goal of ensuring large corporations are taxed fairly for doing business in our state. There are a number of ways to achieve this goal, but I believe that……
Blocking

• It’s not appropriate for me talk about that because…
• It’s the wrong time to make any comments on that… but what I can say is
• I’m the wrong person to comment on that, but what I can say is…
• That’s a matter for X, but, as the treasurer, I believe…

• That’s interesting. However I look at it quite differently…
• That’s not my area of expertise, but I will say that…
• It is important to remember that…
What is Social Media?

• Allows you to communicate directly with constituents and journalists
• Can help Increase earned-media coverage
• Allows you to maintain control of your message

**Facebook**
• Share personal stories and news
• Build relationships with community
• Speak directly with constituents
• 79% of online users in the US have Facebook

**Twitter**
• Involves frequent posting and linking to other users’ content
• Curate and comment on news
• Interact with reporters
• 24% of online users in the US have Twitter

**LinkedIn**
• Share thought pieces and news from major outlets
• Connect with professionals in relevant industries
• 29% of online users in the US have LinkedIn
General Best Practices

Engagement is everything. Passive social media posts will get lost in social media feeds. How do you get around that?

• Ask questions
• Post regularly but be picky about what you post
• Post more images, videos, links, and GIFs
• Interact and “mention” with strangers and share their content
• Posts live forever; be smart about what you share!
Questions.

Thank you.
You are invited

- NAST Legislative Conference
  - February 10-12
  - Prior to the New Treasurers’ Symposium
  - You’ll hear more about our conferences next week in final webinar

- Marathon Strategy will be live streaming and capturing video
Contact Us

• Kari Arfstrom
  • Deputy Executive Director for Learning
  • kari@statetreasurers.org

• Jeremy Dawson
  • Policy and Program Specialist
  • Website and members-only webpage guru
  • jeremy@statetreasurers.org