

## **NAST Public Relations / Communications RFP Questions & Answers Released**

**Monday, November 16, 2020**

**While each submitting organization may not find their exact question(s) below, the purpose and intent of each question has been included in the responses you will find in the following pages.**

- **What is the NAST's budget for this project? Are there any budget parameters, i.e budget cap?**

Bidders should plan to submit a price and scope of work that provides best value to NAST in achieving the goals outlined in the RFP. Please keep in mind that NAST is a small non-profit association. We are looking for bids that are creative and impactful at a reasonable cost.

- **What is the budget? Can vendors present budget ranges in submissions?**

Vendors are free to submit their budget proposal as they see fit, but please keep in mind it is likely that most bidders will submit a single price proposal.

- **Should pricing for services that require travel include travel costs, or only pricing for personnel/support services?**

Either method is acceptable, please note what is / isn't included in the pricing provided in your proposal.

- **Do you prefer to pay on an hourly basis or a retainer basis?**

Typically, NAST has paid for these and similar services via a retainer, however the firm making the proposal should use whichever model best fits their ability to provide the services outlined in their proposal.

- **Who was the previous agency (if applicable) and are they part of this RFP process?**

Marathon Strategies is our current provider and they are eligible to make a proposal during this RFP process.

- **What are your goals for expanding membership?**

NAST's Board created a "universal membership" approach to encourage greater participation from our principal members' (the State Treasurers) staff, as well as our Corporate Affiliate members' staff. This approach means that staff no longer are required to pay for NAST membership if their employing office or company are NAST members. Given this change, we are working to build awareness of the benefits of NAST and encouraging staff to participate. Going "wider and deeper" into member offices/firms is a major focus of NAST at present.

- **If you were to prioritize your most important goals for a partnership with a new firm, what would they be?**

Two strategic priorities provide the basis of the organizations PR / Communications efforts

related to the RFP, these are; 1. Position NAST and its Affiliated Networks as a key policy advocate and authority on Member identified critical policies and issues, and 2. Raise the stature of the Association so NAST and the Networks are viewed as thought leaders and subject matter experts on treasury, public finance, college savings, disability savings, unclaimed property and other issues.

- **How important is marketing to potential new sponsors and should this also be reflected in the response to the RFP?**

Sponsorship represents a significant revenue source for NAST. Therefore, we must do everything we can to highlight this opportunity to prospective sponsors. Inclusion of a discussion of methods you have found will enhance sponsorship opportunities would be helpful.

- **Does “3 option years” mean a total of 3 additional years possible following the 2-year contract, or a total of 1 additional year following the 2-year contract?**

The firm would be eligible for three additional one-year renewal periods following an initial two-year contract. This will result in a total of five years, if both parties agree to those terms.

- **How many firms have been invited to respond to this RFP? Will you be releasing a bidders list?**

The RFP was distributed to NAST and Network members with a request that members share the RFP with firms they believe would be interested in responding to the RFP. Additionally the RFP was distributed directly to approximately ten firms that were referred to NAST staff as qualified applicants. A bidders list will not be released for this RFP.

- **Page 6 mentions that proposals will remain confidential until the review committee has reviewed and announced its intent to award. Does this mean that NAST intends to share proposals with competitors and other entities after award?**

NAST will not share proposals with competitors or other entities after the contract has been awarded. NAST staff and the review committee will keep all proposals confidential following the award of the contract.

- **Page 8 references bios for “principals.” Please define “principals” for these purposes—does it include a firm’s executive team?**

Principals could include the firm’s executive team and any other employee who would be working on the contract for NAST.

- **For the public relations efforts, there is mention of national monitoring – we are assuming you will want to seek national coverage as well, is this correct? And if that is not correct, can you define what geographic regions you are wanting to be intentional about seeking coverage in?**

Yes, our main focus for all public relations work will be the national level, specifically with national media outlets and those that target the federal government (policymakers/regulators/etc.).

- **There is a section on Member outreach and content that references being available for individual member support, can you confirm how many members we will need to be available to and if this is something you want to account for via a retainer or offering an SOW on a case by case basis?**

Occasionally issues arise related to legislative/regulatory actions or special event months/weeks/days. In the past, the Agency has been instrumental in the development of content/material for members to use to advocate or promote these issues. Our goal is to help our members broadcast and promote issues that are of interest to NAST. The selected firm will work with the NAST executive committee, NAST staff and individual members to implement outreach on these and other issues. this type of work would be part of the retainer and would be done in conjunction with outreach NAST/Networks are conducting at the national/federal level.

- **For designing items such as infographics, one-pagers, reports, brochures and other documents - do you want us to offer an hourly rate for graphic design or make a recommendation on a graphic design retainer? It can be challenging to provide pricing on this type of work without understanding the full scope for each item and how many requests are typically made. Any additional insights are appreciated.**

Providing both options would be helpful. Ongoing work includes banners for emails, the newsletter, and social media, collateral designed to support advocacy and awareness issues, etc. You will find examples on the websites for NAST and the three Networks.

- **How important is it for NAST to hire an agency with capabilities to oversee both digital and media relations?**

Both digital and media relations are critical components to the success of the work that NAST hopes to accomplish through the successful implementation of the work included in the scope of this RFP, therefore it is critical that the agency hired be capable in both areas.

- **Are there any specific audiences and/or influencers that the organization is looking to target?**

Target Audiences for the services provided thru this RFP include, but are not limited to:

1. NAST members (principles and corporate) and potential members
2. Media who cover Public Finance, Personal Finance, Higher Education, Disability and other fields of interest to NAST / Network members
3. Federal & state legislative and regulatory decision makers
4. General Public

- **What is meant by “digital analysis of traditional and online platforms” (p. 5, “Analytical Support and Research”)? In particular, what traditional platforms are you referring to?**

We are seeking leadership from the Agency in the establishment of metrics to determine success in our public relations and communications efforts, both in our efforts to promote NAST and the Networks in the national media and at the federal level as well as in all of our social media channels.

- **Can you give some indication of what the key performance measures (KPM's) you use to evaluate the success of your PR/Communications vendor, in order of priority? Are there particular baseline KPM's that you believe need to be improved?**

Making sure that we communicate our message(s) successfully to the right audiences and that our intended effect is realized (e.g. legislation being supported, national media outlets recognize the organizations as thought leaders and interview leaders for articles, etc.). When the contract is awarded, NAST and the Agency will establish the current baseline and goals for success for year one. We operate with planned activities throughout the year and also need to react to events as they occur, often due to federal policy discussions. The ability to implement the plan while also effectively reacting to circumstances is the general measure of success.

- **What does success look like? How is NAST currently measuring brand recognition or sentiment? Has NAST launched campaigns in the past that were viewed as successful by key stakeholders? What made them successful?**

NAST would like to improve and formalize its measurement processes. We have anecdotal evidence that our brand is well received and trusted but would like more data to demonstrate that and identify areas where it can be improved.

- **Would NAST be open to a brand and/or website refresh?**

NAST would be open to a brand/website refresh but it is not a critical component of the scope of this RFP.

- **Can you offer a sample of the NAST Morning brief?**

A full week of NAST Newsletters can be found at the end of this document

- **Can you provide any analytics on your current newsletter; for example open rates? Can you share the current audience size and target audience (eg, Mainly NAST members or others in the finance space?) Is the organization looking for help with list building for the ongoing newsletter?**

Currently the average open rate hovers around 20%, and trends higher around conferences / events. The Newsletter is targeted to our current members, but NAST "supporters" may also sign up. There is a link [on the website](#) to do so. While we are always looking to grow the distribution list, we would rather it be in a very targeted method. We stress quality over quantity.

- **Where would the social media video recordings most frequently take place?**

In the past, these recordings have taken place at NAST conferences, however we are open to exploring other opportunities to creatively produce videos / social media content given the current travel restrictions for most members.

- **Would the agency hired be required to produce social media graphics?**

Yes, that would be part of the contracted services. Additionally, we are open to exploring other opportunities for the development and production of these types of graphics that would fit the scope of the services proposed in the RFP.

- **What would the approval process be for social media content?**

In the past we have found that review of monthly social media calendars by NAST staff or a small group of key members has worked well in the oversight/approval of social media content. NAST is a relatively flat organization internally and we can quickly review and approve content generated by the vendor.

- **Are there other social media platforms that would need to be managed besides the following:**

Here is a comprehensive list of current social media channels

**NAST –**

<https://twitter.com/statetreasurers>

<https://www.linkedin.com/company/treasurers/>

**CSPN -**

<https://www.instagram.com/529forcollege/>

<https://www.facebook.com/529forCollege/>

<https://twitter.com/529forcollege>

<https://www.linkedin.com/company/529collegesavingsplans/>

[https://www.youtube.com/channel/UC-6Gv-SFz2OWeCUcL0vOPww?disable\\_polymer=true](https://www.youtube.com/channel/UC-6Gv-SFz2OWeCUcL0vOPww?disable_polymer=true)

- **Do any of your digital channels take precedence over the rest?**

No particular social media channel takes precedence over others in our current lineup, however if you believe that we should be more strategic in our social media effort, we are open to having a discussion about most effectively using our resources in the social media space.

- **Is there a reason NAST isn't on Facebook?**

As a means to optimize our effort in social media, NAST decided to focus on Twitter and LinkedIn at present, but we are open to expanding beyond those two social media channels.

- **In addition to the review and development of the CSPN communication strategy, is the execution of CSPN's digital/sponsored content/paid search included in the scope of work and budget, or would there be a separate budget for that?**

This should be included in the budget for this RFP.

- **Is there interest in a paid component to the NAST social media budget?**

We are interested in learning about the opportunities that a paid component may add to our social media outreach. While this may not be critical to the success of the proposal, inclusion of these opportunities in the proposal will be reviewed and scored accordingly.

- **Do you intend for the chosen firm to run and manage NAST social media handles, or work in coordination with an in-house communications officer?**

The intent is for the chosen firm to run and manage the NAST / Network social handles with oversight and approval provided by NAST staff in conjunction with members as needed.

- **What is the budget allocated for paid media, including digital communications activation?**

We do not have a “paid media” budget and would consider this on a case-by-case basis. Our preference would be to focus on “earned media” opportunities.

- **Also pertaining to social media, are you looking for someone to monitor throughout the day for direct messages and chat conversations? And if so, what are the expected hours for monitoring?**

The chosen firm would be expected to monitor all social media handles for direct messages during regular business hours. It is not expected that this be real time monitoring, but a regular review of accounts for any direct outreach throughout the day. At this time we do not anticipate “chat conversations” being utilized for our social media outreach.

- **Is the organization looking for assistance with social media content creation?**

Yes, the chosen firm would be expected to lead the association’s effort to create relevant social media content.

- **How is success defined in terms of online growth?**
  - a. Followers?
  - b. 529 account growth?
  - c. Sharing of overall content?
  - d. Website traffic growth?

All of these, except 529 account growth, are key measures of success for our social media and websites.

- **With a number of websites under the NAST umbrella, are there any specific sites that are higher in priority when it comes to driving traffic?**

Each site has a specific target audience and expectation for use by members. While there is no prioritization of sites, we do expect that driving website traffic will be a key performance measure when determining success.

- **Does NAST have any recent member/stakeholder research that could enhance bidder responses?**

NAST conducted a members’ needs assessment in 2018, but most of the recommendations have been implemented. Anything else is publicly available on the websites.

- **On p.4, “Member Outreach and Content Production,” you ask for media kits. Are these new deliverables that the vendor would need to create from scratch, or would the vendor be updating legacy materials?**

These could be both new deliverables and legacy materials that would require updating. We have several media and advocacy outreach kits, but regularly need to create new ones as the need arises.

- **On p.5, under “Thought Leadership”, you request: Focus on building NAST and the Network’s reputation and “brand” by developing and presenting a well-differentiated value proposition. What is the reputation and the “brand” that these groups have and with what audiences? Could you describe what efforts NAST and its Networks have undergone to distinguish itself and its “brand” and the success of those efforts? Also, what do mean by “value proposition?” Are their competitive groups to NAST and the Networks and who are they?**

There are a number of similar organizations in which there is, or can be, overlap between their membership and NAST’s, such as NASACT, SFOF and GFOA. NAST is the only organization that focuses solely on providing benefits and services to state treasurers, their staff and the affiliated networks in a bi-partisan/non-partisan manner. NAST also is an effective voice of these state treasuries and other state agencies on Capitol Hill, in the Administration and with regulatory agencies in DC.

- **In that same section you request: Develop and maintain members as “thought leaders.” What audiences are you striving to have the NAST and its Networks be seen as thought leaders? Are there a few examples you could share of your group’s members being “thought leaders?”**

Thought leaders include NAST principal members (State Treasurers), Network Leadership, Committee Chairs and the executive director. NAST publishes a Thought Leader column each Thursday ([examples here](#)), the Networks do similar outreach with peer-to-peer articles/blogs. Primarily the focus is on legislation and regulations at the federal and state level in the national media.

**Chris Hunter**

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**From:** Shaun Snyder, NAST <morningbrief@statetreasurers.org>  
**Sent:** Monday, November 2, 2020 10:53 AM  
**To:** NAST  
**Subject:** NAST Morning Brief

**Monday, November 2nd, 2020**



## **IN THIS BRIEFING**

**NAST News | Featured News | Corporate Affiliate Spotlight | College Savings  
| Financial Education | Public Finance | Retirement Security | Top Tweet**

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### **NAST News**

#### **Submit Links for the next State News Round Up**

Do you have a story you'd like to see in next week's State News Round Up? Please send us any links or clips that you would like included! All you have to do is email the link to the [NAST team](#).

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### **Featured News**

#### **Millions of Americans may relocate due to remote work trends**

The days of building a life in close proximity to where you work may be over. New research shows that between 14 million and 23 million households plan to move, thanks to the rise in acceptance of remote working as the new normal. – [Yahoo! Finance](#)

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### **Corporate Affiliate Spotlight**

#### **A new book: Route 529**

Patricia Roberts, long-time corporate affiliate and COO of GiftofCollege.com, recently released a new book, [Route 529: A Parent's Guide to Saving for College and Career Planning with 529 Plans](#). With her love of writing, a bit of extra time on her hands during this period of social distancing, and her determination to further raise awareness and use of 529 plans, she's taken her 20+ years of professional experience working with these plans and her personal experience of saving to get her son through college debt-free to create an easy-to-understand, informative, and reassuring guide to 529 college savings plans for other parents. During its first two weeks on Amazon, Route 529 has ranked



as the #1 New Release ratings in 8 categories relating to parenting, tax, budgeting and money management, crowdfunding and education.

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## College Savings

### **Five times Americans should not save for college**

Here are five instances where college savings should take a back seat to other financial priorities. – [Forbes](#)

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## Financial Education

### **Disparities in financial literacy may exacerbate inequality**

The benefits of financial literacy persist over time, according to new research published by the FINRA Investor Education Foundation. The study sought to use longitudinal data — a panel of 1,500 respondents who were surveyed in 2012 and again in 2018 — to assess the impact of financial literacy over time. – [Investment Executive](#)

### **Why diversity and inclusion initiatives need financial wellness**

Although there are a lot of important threads to the D&I conversation, there's one element that often gets left out: financial wellness. – [Employee Benefit News](#)

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## Public Finance

### **Muni volume hits \$65B in October, another record**

The municipal bond market saw the second highest issuance month ever in October with \$65.20 billion, trailing only the \$69.83 billion in December of 2017 right before tax law changes that eliminated advanced refundings went into effect. – [The Bond Buyer](#)

### **Institutional investors say ESG factors can be applied to securities lending**

Securities lending might be part of a defined benefit (DB) plan's investment strategy. A survey of leading institutional investors revealed that 95% of respondents believe securities lending activities can coexist with environmental, social and governance (ESG) principles. – [Plansponsor](#)

### **Sustainable fund assets pass \$1.2 trillion**

While 2020 has been a year for most to forget, it's been one to remember for environmental, social and governance (ESG) investing. The ESG space was highlighted by sustainable fund assets reaching the \$1.2 trillion mark in the third quarter. – [Nasdaq](#)

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## Retirement Security

### **Americans feel anxious about their retirement savings amid pandemic**

Millions of Americans expect their efforts to save for retirement to be derailed, perhaps permanently, by the coronavirus pandemic. That's the main takeaway from several surveys released in October that begin to create a snapshot of the retirement landscape in the Covid era. – [Barron's](#)

### **Retirement savings is hard even for those who can afford it**

Covid-19 has thrown a wrench in retirement planning. Rising unemployment, a volatile stock market and economic uncertainty are jeopardizing the ability of many families to plan for the future. However, even before the pandemic, saving for retirement was not easy. – [Bloomberg](#)

### **Big changes may be coming to 401(k), IRA and other**

A bipartisan bill has been introduced in the House that would make significant changes to 401(k),

403(b), IRAs and other retirement plans. – [Forbes](#)

**Public plans' social investing may impact returns, social goals**

Social investing by public pension plans may yield lower returns and be less effective at achieving social goals, according to a Center for Retirement Research at Boston College brief released Tuesday. – [Pensions & Investments](#)

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**TOP TWEET:** In a recent interview with @CNBC's @jdickler, @ILTreasurer said, "When it comes to 529 #CollegeSavings, staying the course is an essential component of a successful long-term savings strategy." Read the full article here: <https://cnb.cx/2HG7nN7> – [@StateTreasurers](#)

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Sent to: [nast@statetreasurers.org](mailto:nast@statetreasurers.org)

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National Association of State Treasurers, 1201 Pennsylvania Avenue NW, Suite 800, Washington, DC 20004, United States

## Chris Hunter

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**From:** Shaun Snyder, NAST <morningbrief@statetreasurers.org>  
**Sent:** Tuesday, November 3, 2020 10:12 AM  
**To:** NAST  
**Subject:** NAST Announcements

Tuesday, November 3rd, 2020



The graphic features a laptop keyboard on the left. The text reads: "Security Through Simulation: How to Respond to a Social Media Hack" in bold black font. Below this, it says "Wednesday, December 9" and "3pm ET / 2pm CT / 1pm MT / 12pm PT" in green. A "REGISTER NOW" button is in a gold box. The "NASTcast" logo is in green script. At the bottom right is the NAST logo and "NATIONAL ASSOCIATION OF STATE TREASURERS".

## NAST Announcements

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### Upcoming SDMN Virtual Networking Event

*Tuesday, November 17 from 2:00pm – 3:30pm ET / 1:00pm – 2:30pm CT / noon – 1:30pm MT / 11:00am – 12:30pm PT*

Join the State Debt Managers Network for our upcoming virtual networking event on Tuesday, November 17. Participants will get the chance to network with other state debt professionals across four topical breakout rooms. SDMN members should have already received information on the event. Corporate affiliates and other interested members should contact [Brian Egan](#) to RSVP for the link. We look forward to seeing many of you there!

**Virtual Office:** Office functions, human resources and training new employees in the virtual world.

**Investor Relations:** Maintaining and building relationships with the buy-side and all things disclosure.

**ESG and Cybersecurity:** Discussions around the new risks facing bond ratings as well as new opportunities around ESG.

**Coffee Shop:** General conversation, idea exchanges and “meet-&-greet” setup.

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### Webinar: Security through Simulation: How to Respond to a Social Media Hack

Wednesday, December 9 from 3-4 pm ET / 2-3 pm CT / 1-2 pm MT / noon to 1 pm PT

Where do you draw the line between “openness” and “oversharing” on Social Media? How do you balance wanting to make connections to expand your professional network with exercising the right amount of caution when receiving requests from unknown individuals? Recent high profile attacks leveraging social media platforms underscore how cyber criminals are increasingly utilizing social media as their “virtual playground”, targeting employers and employees alike.

This online session will review the latest cyber threats posed by social media, outline real world examples of recent attacks, and leverage a table top exercise to simulate a real-life scenario in order to explore key strategies on how to remain vigilant and recognize potential threats to you and your organization. Presented by Adam Bulava and Mone’ Ross from J.P. Morgan, this training event is free for NAST members, [registration](#) required.

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## **GASB Seeks Input on Reporting of Nonfinancial Assets**

The Governmental Accounting Standards Board (GASB) is conducting a survey of preparers of governmental financial statements regarding the reporting of nonfinancial assets. The survey is part of a GASB research effort that, in part, will evaluate the need for specific guidance related to the nonfinancial asset classification. The survey should take about 10–15 minutes and can be accessed by [clicking here](#). *The deadline for completing the survey is November 24, 2020.*

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## **NAST ABLE Committee Establishing Final Regs Working Group**

The ABLE Committee is establishing a working group to review the [final ABLE regulations](#) and determine if the committee has any questions about the regulations that could impact states ability to administer the plans and might require additional discussion with the Department of Treasury and the IRS.

In order to efficiently review the regulations and determine what questions we want to ask the regulatory agencies, we are proposing that all interested individuals volunteer to review various issues/sections of the regulations and bring relevant topics for consideration back to the full committee. [Please complete this brief survey to volunteer for this working group](#).

Thank you for your willingness to participate in this important project. Contact [Chris Hunter](#) for more information.

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## **CSPN Survey: Low/Moderate Income and Underserved Populations**

CSPN Federal Initiatives Committee is asking all states / 529 plans to respond to this [brief survey](#) regarding the types of initiatives that are being implemented to identify and serve low / moderate income and underserved individuals and families. The committee is also interested in collecting, in the aggregate and anonymized if requested, any demographic data that you collect about account owners and beneficiaries.

These initiatives and data will be used to help us better tell the story about who opens and uses 529 accounts, and industry efforts to broaden the demographics of 529 participants and beneficiaries. As we advocate for enhancements to 529 plans in the upcoming lame duck session of Congress and, more importantly, as we engage with the new Congress in 2021, it is important that Members of Congress view 529 plans as beneficial to all and that they see the substantial efforts across the country to increase access to college and career education for all citizens.

Thank you in advance for your response. Contact [Chris Hunter](#) for more information.

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**TOP TWEET:** #BabyStepsSavingsPlan UPDATE: Over 3,000 Massachusetts families have opened a 529 college savings account for their child & received the free \$50 BabySteps seed deposit! That's over \$150,000 in savings for our future generation of students. <https://babystepssavingsplan.org> – [@EmpowermentMA](#)

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## Chris Hunter

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**From:** Shaun Snyder, NAST <morningbrief@statetreasurers.org>  
**Sent:** Wednesday, November 4, 2020 10:34 AM  
**To:** Chris Hunter  
**Subject:** NAST Morning Brief

Wednesday, November 4th, 2020



### IN THIS BRIEFING

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## NAST News

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## Featured News

### Fortifying networks for prolonged telework: the pandemic and beyond

The impact of the COVID-19 pandemic on telework was swift and profound. By early April, about half of the American workforce, including state and local government workers, was telecommuting full-

time. As agencies formulate forward-looking telework strategies, three considerations will help them to evaluate and shore up their networks for work-from-home scenarios. – [American City & Country](#)

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## College Savings

### **Pay it forward a generation with 529s**

My family is living proof of the multigenerational potential of 529 college savings plans. As more and more plans around the country celebrate 25th and 30th anniversaries, I often find myself reflecting on the transformative nature of 529s. This is something still playing out in my life today. – [College Savings Plans Network](#)

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## Financial Education

### **Why do we need financial literacy?**

Why do we have to care about financial literacy? As a college student, isn't it more important to focus on academic performance? Although studying hard is your responsibility to ensure student success, simply studying hard and earning a degree does not guarantee your success after graduation. – [Penn State](#)

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## Public Finance

### **Infrastructure After COVID-19: Risk Of Another Lost Decade Of U.S. State Government Capital Investment**

As the country begins to recover from the COVID-19-induced recession, which was even more severe than the Great Recession, experts at S&P Global Ratings see a growing risk of continued underinvestment in infrastructure. – [S&P Global](#)

### **Munis steady as America makes its choice**

As voters across the nation went to the polls on Tuesday, the municipal bond market remained cool, calm and collected with participants waiting patiently on the sidelines ahead of the results. Top-quality munis finished steady across most of the curve, with yields remaining flat on AAA scales. – [The Bond Buyer](#)

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## Retirement Security

### **Industry group pans final DOL rule on ESG investing**

The U.S. Department of Labor (DOL) issued a final rule to provide regulatory guideposts for plan fiduciaries seeking to invest using non-pecuniary principles, particularly those involving environmental, social, and governance (ESG) investing. – [Insurance News Net](#)

### **How the election could help SECURE 2.0 win fast-track approval**

Tuesday's election could be a big X-factor in whether or not the new "SECURE 2.0" retirement reform bill introduced last week could be fast-tracked across the finish line, perhaps even before the end of this year. – [401k Specialist](#)

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**TOP TWEET:** How a successful 300 person Zoom meeting looks like! Treasurer Goldberg, Deputy Treasurers, Department Heads, and @MassTreasury employees . #OneTeamOneMission to #GetTheJobDone. – [@MassTreasury](#)

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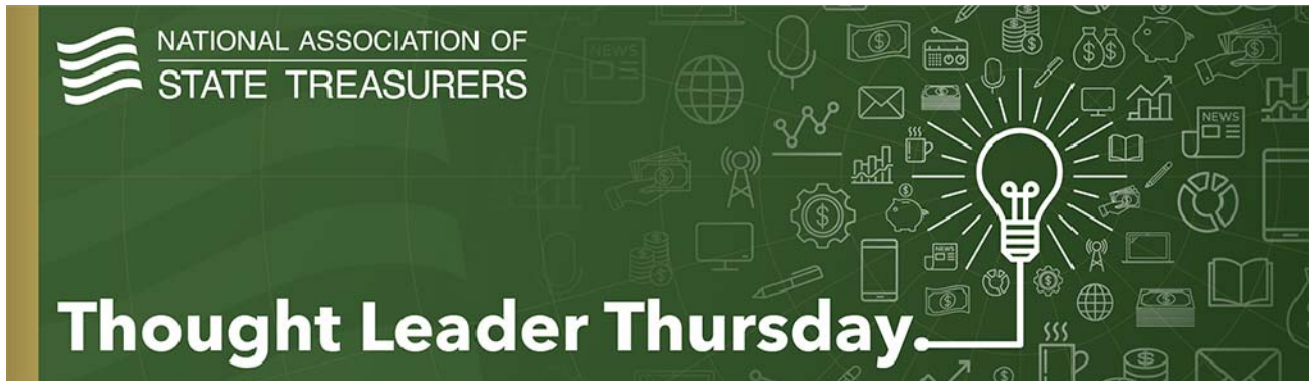


## Chris Hunter

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**From:** Jeremy Dawson, NAUPA Director <morningbrief@statetreasurers.org>  
**Sent:** Thursday, November 5, 2020 11:26 AM  
**To:** NAST  
**Subject:** NAST Thought Leader Thursday

Thursday, November 5th 2020



### IN THIS BRIEFING NAST News | Thought Leader Thursday

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## NAST News

### **Congratulations to Kansas State Treasurer Jake LaTurner**

NAST would like to extend a special congratulations to Kansas State Treasurer Jake LaTurner, who won Kansas' 2nd Congressional District race Tuesday night and will head to Congress next year. Read more [here](#).

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## Take Advantage of NAST Benefits

*By Jeremy Dawson, Director of the National Association of Unclaimed Property Administrators*

Dear Colleagues,

I have the great privilege of serving as the Director of the National Association of Unclaimed Property Administrators. It is so important that our members are able to connect with their colleagues across the country as we strive to return property to its rightful owner. By the way -- when was the last time you checked to see if you have any unclaimed property? Learn about the billions returned by state programs and how to search on our [interactive website](#).

Whether you consider yourself a member of NAST, NAUPA, CSPN, SDMN, or a Corporate Affiliate - if you are in a dues paying office you are connected to one of the largest networks of public finance professionals around the country.

While we all feel more distant than ever before, in a world besieged by notifications and pulls for attention, our association wants to help you connect with the colleagues and communications you need to continue the exceptional work you do to benefit the public each and every day. Here are a few things you can do to make sure you are getting all the benefits of your membership with NAST:

## **Update your NAST Profile and Find a Colleague**

Working from home and have a new preferred address or phone number? Recent change in job title? Take a moment to [review and update your records](#) to help NAST and your colleagues connect with you. Once you've updated your profile and hit the Save Changes button, [view your profile](#) or [find your colleagues](#) in our directory.

If you have issues logging in, [click here](#) to reset your password.

## **Join a NAST Caucus, Forum, or Topical Communication List**

NAST has a number of caucuses, forums, and topical communications available to join on our Communications page. Caucuses are more formal groups with an assigned staff liaison and regularly scheduled calls. Forums are more casual lists for discussion/sharing. There are great benefits to connecting with colleagues from around the nation to share, discuss, and simply know we are all in this together.

- Chiefs of Staff/Deputy Treasurers Caucus
- Financial Education Directors Caucus
- Government Relations and Public Information Caucus
- Information Technology Forum
- Retirement Security Forum
- Executive Assistant/Scheduler Forum

Topical communications will sign you up to receive news updates and general information about the topic.

- ABLE Plans
- College Savings Plans
- Debt Issuance
- Unclaimed Property

Joining is simple. Click the link on the [Communications page](#), enter your email, and click Join.

Receiving too many emails from NAST? You can manage all of your email communications by visiting and bookmarking <https://nast.topicbox.com/groups>.

## **Receive and Contribute to the Newsletter**

NAST runs intentional programming each day of the week in the Morning Brief -- the Monday and Wednesday editions include highlights of public finance news, Tuesday's edition helps you stay up-to-date with association activities, Thursday's edition includes a Dear Colleague letter from the experts in policies and practices of state treasuries and public finance issues, and Friday is the State News roundup.

If you're a state member with a story to promote in our newsletter, or a Corporate Affiliate partner with a new white paper, report or other relevant story, please email those links to [our team](#) for

consideration.

I'm as sick of spam calls, texts, and emails as everyone, and we don't want our content to get caught in those filters. If you'd like to ensure you continue receiving our emails uninterrupted, please add our email address to your safe senders list - [morningbrief@statetreasurers.org](mailto:morningbrief@statetreasurers.org).

Are there others in your office who do not get this member benefit? Please pass it on and let them know they can [sign up here](#) to receive it. If you wish to unsubscribe, there is a link at the bottom of each email, but we welcome [feedback and comments](#).

So before you close this email and get back to work, binge Netflix, searching for your name on [missingmoney.com](http://missingmoney.com), or scroll social media, take 5 minutes to manage your NAST Profile and Communications and ensure you are properly represented and connected to our network of exceptional members.

Sincerely,

Jeremy Dawson  
Association Director  
[National Association of Unclaimed Property Administrators](#)

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*To read past issues of the Thought Leader Thursday newsletter and learn about our submission guidelines, please click [here](#).*

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Sent to: [nast@statetreasurers.org](mailto:nast@statetreasurers.org)

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National Association of State Treasurers, 1201 Pennsylvania Avenue NW, Suite 800, Washington, DC 20004, United States

## Chris Hunter

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**From:** Shaun Snyder, NAST <morningbrief@statetreasurers.org>  
**Sent:** Friday, November 6, 2020 11:03 AM  
**To:** NAST  
**Subject:** NAST State News Round Up

Friday, November 6th, 2020



### IN THIS BRIEFING

NAST News | State News Round Up | Top Tweet

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## NAST News

### Upcoming SDMN Virtual Networking Event

Join the State Debt Managers Network for our upcoming virtual networking event on Tuesday, November 17 from 2:00pm – 3:30pm ET | 1:00pm – 2:30pm CT | noon – 1:30pm MT | 11:00am – 12:30pm PT. Participants will get the chance to network with other state debt professionals across four topical breakout rooms. SDMN members should have already received information on the event. Corporate affiliates and other interested members should contact [Brian Egan](#) to RSVP for the link. We look forward to seeing many of you there!

**Virtual Office:** Office functions, human resources and training new employees in the virtual world.

**Investor Relations:** Maintaining and building relationships with the buy-side and all things disclosure.

**ESG and Cybersecurity:** Discussions around the new risks facing bond ratings as well as new opportunities around ESG.

**Coffee Shop:** General conversation, idea exchanges and “meet-&-greet” setup.

### Submit Links for the next State News Round Up

Do you have a story you'd like to see in next week's State News Round Up? Please send us any links or clips that you would like included! All you have to do is email the link to the [NAST team](#).

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## State News Round Up

### California

#### Saving for college amid the pandemic

CBSN Bay Area interviews State Treasurer Fiona Ma about the ScholarShare 529 program, which is the state's official college savings plan. They talk about the importance of saving for college, even in

the age of Covid. – [Yahoo! News](#)

**State Treasurer Fiona Ma announces \$450M to provide stable funding for more homeless housing**

California State Treasurer Fiona Ma announced the sale of \$450 million in revenue bonds by the California Health Facilities Financing Authority for the State's No Place Like Home (NPLH) program, which was approved by voters in 2018 to provide housing and assistance to the State's homeless population. – [Orange County Breeze](#)

**Georgia**

**Georgia's college savings plan sees record growth**

The state of Georgia's college savings plan, the Path2College 529 Plan, saw strong growth in the last quarter, with 4,740 new accounts opened—a 26% increase in new accounts opened and a 23% increase in contribution dollars when compared to 2019. – [Griffin Daily News](#)

**Idaho**

**Idaho faces retirement savings gap**

Six in 10 of Idaho's private-sector workers have no access to a retirement plan at work, according to a state study, and that means big future costs for the state when those workers have to turn to programs such as Medicaid and food stamps when they retire. Idaho State Treasurer Julie Ellsworth has convened an informal working group of stakeholders that's been looking into the issue, the state report says; that group has been meeting for a year. – [Idaho Press](#)

**Kansas**

**Jake LaTurner to represent Kansas in Congress**

State Treasurer Jake LaTurner won the 2nd Congressional District race Tuesday night and will head to Congress next year. LaTurner will now be one of the youngest ever to represent the state in the U.S. House of Representatives in recent memory. – [Morning Sun](#)

**New Jersey**

**Thousands of qualified residents fail to claim low-income tax break. State campaign for more to apply**

The state budget Gov. Phil Murphy signed into law several weeks ago increased funding for tax breaks that help New Jersey residents who have low-wage jobs and struggle to stay out of poverty. "We are acutely aware that there are many people throughout New Jersey who qualify for the Earned Income Tax Credit, but are not taking advantage of the vital lifeline for various reasons," said state Treasurer Elizabeth Maher Muoio. – [NJ Spotlight](#)

**Oregon**

**Oregon College Savings Plan announces multiyear scholarship for underrepresented and diverse students**

The Oregon College Savings Plan announces the opening of the Diversity in Leadership Scholarship for underrepresented and diverse Oregon high school graduates pursuing higher education in the state. Awards may be used to attend a range of Oregon institutions, including apprenticeships, trade schools. – [Oregon College Savings Plan](#)

**Pennsylvania**

**PA529 investment plan earns first-ever Morningstar silver rating**

Pa. Treasurer Joe Torsella announced earlier this week that the PA 529 College and Career Savings Program Investment Plan (IP) has received a rare Morningstar Silver Rating as part of its review of the Top 529 College Savings Plans of 2020. – [Penn Live](#)

**Tennessee**

**Brentwood student earns scholarship for College Savings Month**

Zac Carter, 10, of Brentwood, has been awarded a \$529 scholarship that will be deposited into a TNStars College Savings 529 account in celebration of College Savings Month in Tennessee. – [Williamson Herald](#)

## Washington

### Enrollment opens November 1 for Washington's GET prepaid tuition program

Washington State's Guaranteed Education Tuition (GET) program opens Sunday, November 1 for a new enrollment period, providing families a fresh opportunity to start saving for future college costs while their children are young. – [The Suburban Times](#)

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**TOP TWEET:** In this week's blog post, @AscensusInc's @IndyTroy explains the multigenerational potential of 529 #CollegeSavings plans, based on his family's own experience. Read the full post here: <https://bit.ly/3mSvEOT> – [@529forCollege](#)

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