
DECEMBER 16, 2024

**AGENDA ITEM 11
INFORMATION ITEM**

SCHOLARSHARE INVESTMENT BOARD

Marketing Update and 2025 Marketing Plan for ScholarShare 529 and the California Kids Investment Development and Savings Program

Background

TIAA-CREF Tuition Financing, Inc. (TFI), the program manager for ScholarShare 529 (Plan), has provided its “Q3 2024 Marketing Results” (Exhibit A) for the Plan and the California Kids Investment and Development Savings Program (CalKIDS or Program). This update outlines marketing results for the third quarter of 2024. The update includes results for:

- ScholarShare 529 - Achievements; business results and new accounts and contributions; e-gifting, website accessibility, new account growth and tactical results; creative; holiday gift card offer; public relations; social media; employer outreach; outreach events; and 2024 marketing budget.
- CalKIDS – Achievements, Back to School campaign, PeachJar email campaign, public relations, marketing toolkits, enhanced eligibility tools, CalKIDS Impact Report, updated accounts services form, social media, and 2024 marketing budget.

TFI has also provided its “2025 Marketing Plan” (Exhibit B) for the Plan. The marketing plan provides a review of factors impacting growth in 2025, consumer mindsets, what’s new in 2025, marketing plan goals, including accompanying strategies and tactics, and proposed 2025 budgets.

In addition, Gleeson Digital Strategies, the firm executing paid media efforts for CalKIDS, has provided its “CalKIDS Q3/2024 Paid Campaign Performance” summary (Exhibit C), which provides an overview of results for the paid media campaign executed in third quarter 2024, specifically the CalKIDS Back to School campaign that ran from mid-August through mid-October 2024.

Presenters

Doug Harrison, Senior Director, TIAA-CREF Tuition Financing, Inc.

Yvette Haring, Director, TIAA-CREF Tuition Financing, Inc.

Carol Gleeson, President/CEO, Gleeson Digital Strategies

Otilia Bretan, Media Director, Gleeson Digital Strategies

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ScholarShare529SM

The California way to save for college

Q3 2024 Marketing Results

December 16, 2024

Executive Summary



2024 has been a strong growth year for ScholarShare 529 and CaKIDS

ScholarShare 529

- Marketing Performance Benchmarks adopted by the board earlier this year will be met
- Total Accounts grew 7% YoY thru 9/30 versus 5% for the Direct-Sold category nationally*
- Contributions grew 19% YoY thru 9/30 versus 15% for the Direct-Sold category nationally*
- Over \$1 billion in Contributions for the 4th year in a row
- Gifting Contributions on pace to exceed \$100 million this year
- Reclaimed Silver status with Morningstar

CaKIDS

- Registrations now over 500,000
- Successful campaigns targeting older students
- Onboarding of new media agency
- Spokesperson launch in early 2025

*Source: ISS Market Intelligence – Q3 2024.

ScholarShare 529 2024 Marketing Plan – Q3 Achievements

	Goal	Strategy	Achievements
1	Gain New Accounts/AUM	Strategically use technology and marketing resources to grow the plan.	<p>Accounts</p> <ul style="list-style-type: none"> YTD New Accounts are down 9% versus YTD 2023 YTD New Accounts are 75% of Annual Target of 50,000 YTD Total Accounts of 445,050 are 99% of Marketing Performance Target of 447,667 <p>Contributions</p> <ul style="list-style-type: none"> YTD Contributions are up 19% versus YTD 2023 YTD Contributions of \$962 million are 82% of Marketing Performance Target of \$1.18 Billion <p>Summer Promotion</p> <p>The promotion yielded 2,840 accounts opened thru 8/31 using the promo code, Summer25. Although most of the accounts were opened with the \$250 required for the \$25 match, the average initial contribution was \$3,107 and the average current account balance from the promotion is \$5,439.</p> <p>E-Gifting</p> <p>YTD 2024 E-Gift Contributions of \$70.6 million are up 40% over YTD 2023. Pacing for \$100 million by year-end.</p>
2	Increase Account Owner Diversity	Leverage targeted media and PR/media relations to increase the diversity of ScholarShare 529 account owners.	CalKIDS and multi-cultural media targeting for ScholarShare ads are having a positive effect on diversifying our account owner base. Race/Ethnicity reporting will be quarterly in 2025.
3	Grow plan via Employers/RIAs	Continue to build relationships with employers (public and private) and registered investment advisors to attract new account owners.	Work continues to automate follow-up emails and other correspondence to prospective WPS partners via Salesforce.
4	Support tenured account owners	Continue to enhance the College Countdown program to serve the needs of mature account owners on the cusp of using their 529 savings.	College Countdown website content is regularly refreshed, and current account owners with beneficiaries age 16+ receive a monthly email highlighting new information.

ScholarShare 529 Business Results

- 2024 New Account growth is trailing 2023 reflecting the large volume of CalKIDS mailings in 2023 that resulted in a spike in new accounts. We remain on-track to hit our 50,000 target for 2024.
- YTD 2024 Contributions were up 19.3% versus YTD 2023, partially related to increased consumer resources from positive stock market performance this year and easing inflation.

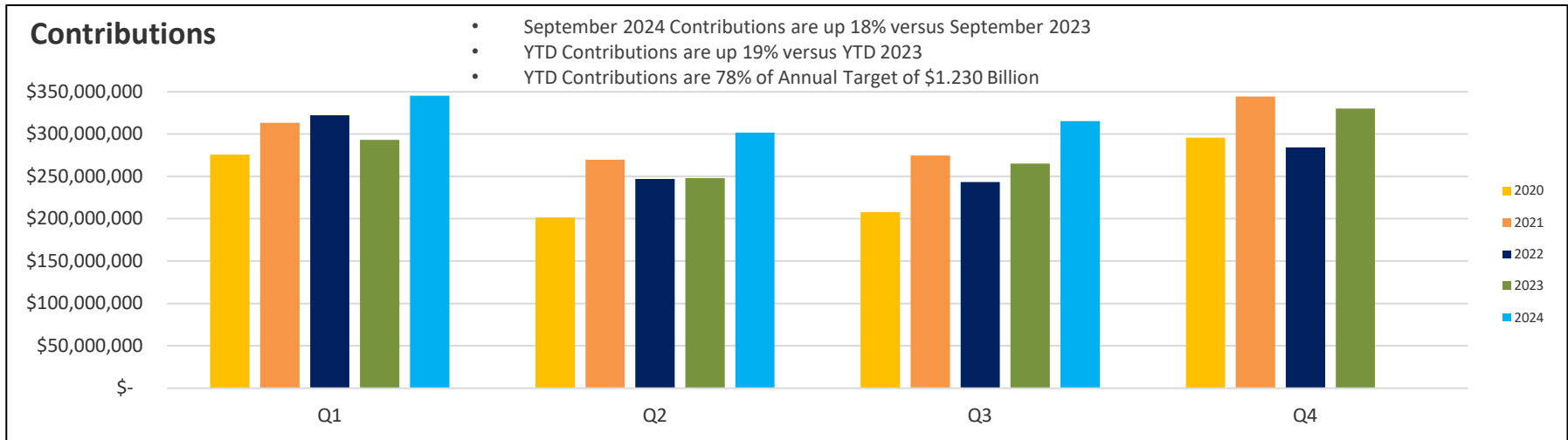
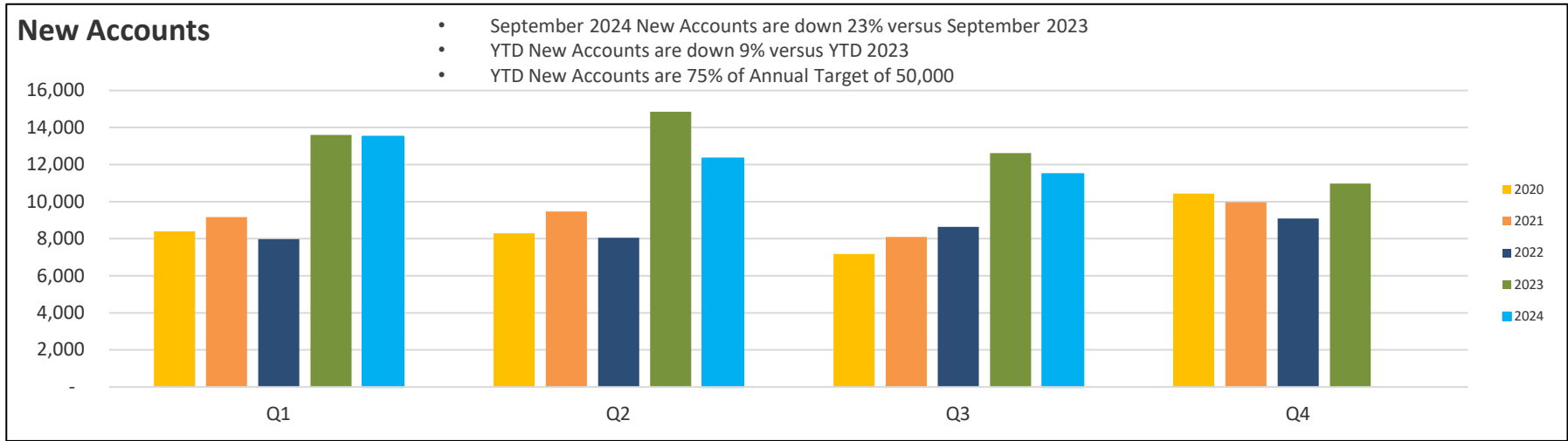
Accounts and Contributions	September 30, 2023	September 30, 2024	% Change
Total New Accounts Opened	41,070	37,345	-9.1%
Total New Contributions Collected ¹	\$806.3 million	\$961.9 million	19.3%
Growth Rate²	ScholarShare 529	Industry	% Difference
Annual Asset Growth Rate excluding CalKIDS/Local CSAs	17.7%	24.3%	-6.7%
Annual Asset Growth Rate including CalKIDS/Local CSAs	24.4%	24.3%	0.1%
Rollovers	Year Ending September 30, 2023	Year Ending September 30, 2024	% Change
% of Plan Accounts Closed Due to Rollovers ³	0.30%	0.37%	0.07%
Accounts and Assets	September 30, 2023	September 30, 2024	% Change
Total Open Accounts	415,911	445,050	7.0%
Assets excluding CalKIDS/Local CSAs	\$12.3 billion	\$15.1 billion	22.9%
Assets including CalKIDS/Local CSAs	\$13.3 billion	\$16.5 billion	24.4%
Market Share excluding CalKIDS/Local CSAs	5.0%	4.8%	-0.2%
Market Share including CalKIDS/Local CSAs	5.2%	5.2%	0.0%

¹ Excludes CalKIDS.

² ISS Market Intelligence – Q3 2024. “Industry” represents all Direct Sold Plans.

³ Excludes accounts closed from rollovers to Roth IRAs.

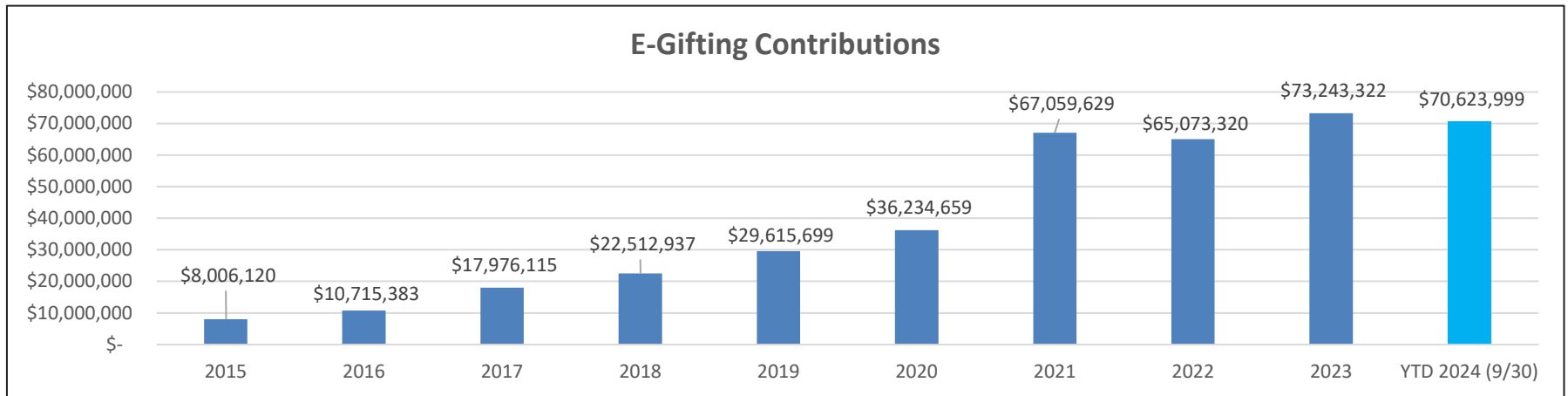
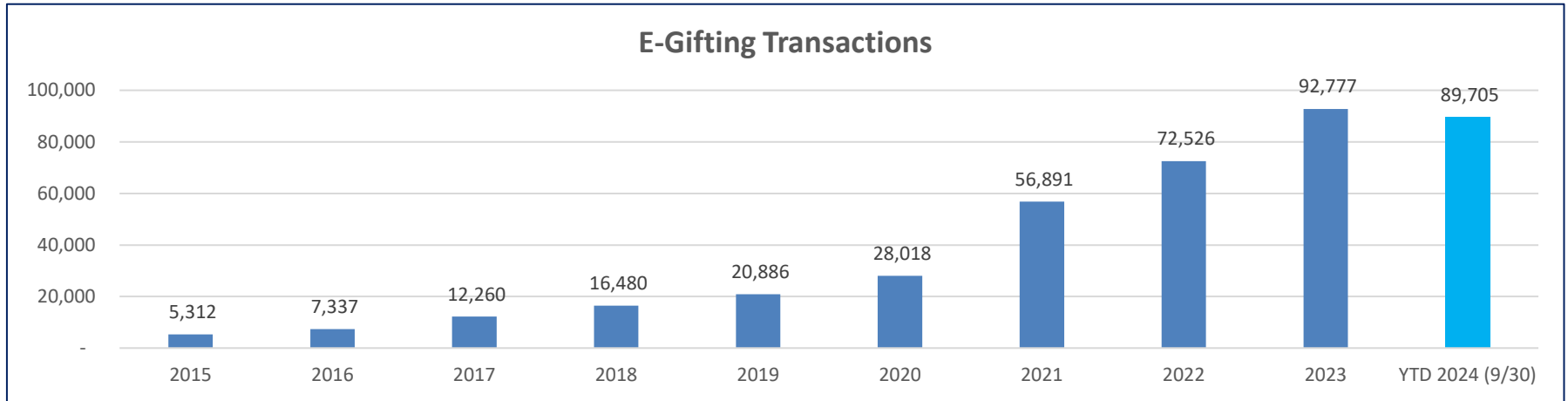
New Accounts and Contributions



E-Gifting: Significant Year-Over-Year Growth



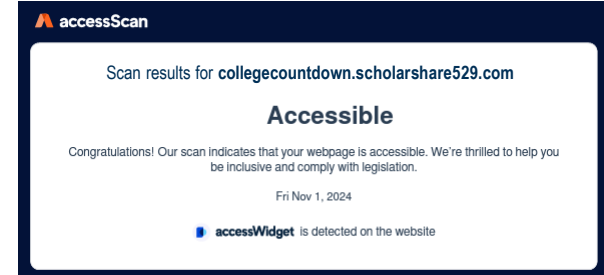
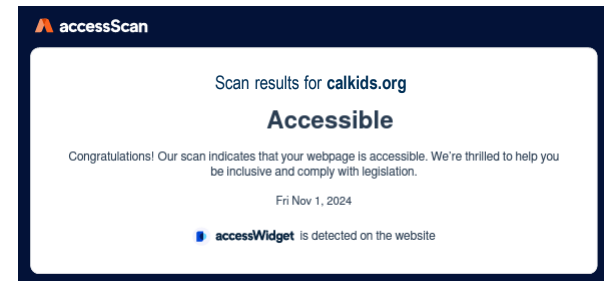
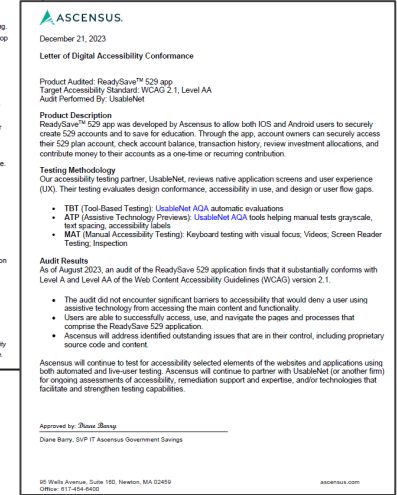
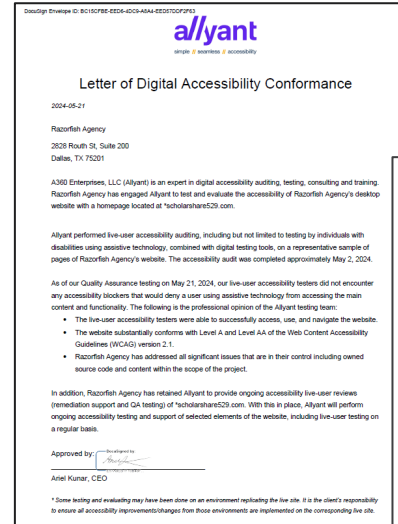
- E-Gifting Contributions make up 7.3% of Total Contributions YTD.
- YTD 2024 Transactions of 89,705 **up 35%** over YTD 2023.
- YTD 2024 Contributions of \$70.6 million **up 40%** over YTD 2023. Pacing for \$100 million by year-end.



Website Accessibility

Websites are regularly monitored for accessibility and adherence to WCAG 2.1 AA. As issues are identified remediation measures are implemented.

- The ScholarShare public website was audited in May 2024 and successfully passed for WCAG 2.1 AA compliance with no issues outstanding. (Allyant)
- The ReadySave app was audited in August 2023 and was found to substantially conform with Level A and Level AA of the Web Content Accessibility Guidelines (WCAG) version 2.1. (UsableNet)
- The CalKIDS website was audited in November 2024 and found to be accessible. (AccessScan)
- The College Countdown website was audited in November 2024 and found to be accessible. (AccessScan)



Driving New Account Growth

Audience	Objective	Tactics and Channels	Cadence
Prospect	<ul style="list-style-type: none"> • Awareness • Interest • Open new accounts 	<ul style="list-style-type: none"> • Search engine marketing • Web advertising • Email (EM) • Direct mail 	<ul style="list-style-type: none"> • Seasonal and Evergreen
Inquirers	<ul style="list-style-type: none"> • Open new accounts 	<ul style="list-style-type: none"> • Search engine marketing • Web advertising • Email • Direct mail (DM) 	<ul style="list-style-type: none"> • Seasonal and Evergreen
New Account Owners	<ul style="list-style-type: none"> • Fund and engage with account 	<ul style="list-style-type: none"> • Email 	<ul style="list-style-type: none"> • Evergreen
Account Owners	<ul style="list-style-type: none"> • Continued engagement and support • Fund accounts • Open additional accounts • New product engagement features 	<ul style="list-style-type: none"> • Primarily email and display • Limited direct mail • Web advertising 	<ul style="list-style-type: none"> • Seasonal and Evergreen

Tactical Results Year-over-Year (YoY)

Audience	2024 Q3 Engagement and Conversion Highlights	2023 Q3 Engagement and Conversion Highlights	YoY Q3 Comparison
Prospect	<ul style="list-style-type: none"> Summer Promotion Direct Mail/Email (DM/EM) campaign generated 440 recurring contributions sign-ups to date 	<ul style="list-style-type: none"> College Savings Month DM/EM campaign generated 550 recurring contributions sign-ups to date 	<ul style="list-style-type: none"> No YoY comparison due to different campaigns in 2023 and 2024.
Inquirers	<ul style="list-style-type: none"> 28% Email unique open rate 4.8% conversion rate with 38 new accounts generated 	<ul style="list-style-type: none"> 27% Email unique open rate 7.3% conversion rate with 87 new accounts generated 	<ul style="list-style-type: none"> Email engagement remained consistent YoY. Q3 conversion rates and new accounts generated decreased YoY, likely the result of there being no incentive offer in September 2024.
New Account Owners	<ul style="list-style-type: none"> 38% Email open rate 0.7% account upsell rate with 284 new accounts 46% recurring contributions sign-ups 	<ul style="list-style-type: none"> 37% Email open rate 0.6% account upsell rate with 268 new accounts 49% recurring contributions sign-ups 	<ul style="list-style-type: none"> Email engagement remained consistent YoY. Upsell rate remained consistent while new accounts increased slightly YoY. Recurring contributions signups slightly decreased YoY.
Account Owners	<ul style="list-style-type: none"> At mid-campaign, Active/Inactive DM campaign had a contribution rate of 12.8% and avg contribution of \$4,277. 	<ul style="list-style-type: none"> College Savings Month EM campaign had a contribution rate of 38.3% and average contribution of \$657 to date. 	<ul style="list-style-type: none"> No YoY comparison due to different campaigns and tactics implemented.

Q3 Creative Examples

Display

THE CALIFORNIA WAY TO SAVE FOR COLLEGE

College savings and tax advantages?
Yes!

[LEARN MORE >](#)

ScholarShare 529

THE CALIFORNIA WAY TO SAVE FOR COLLEGE

Experts in college savings since 1999.

[LEARN MORE >](#)

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THE CALIFORNIA WAY TO SAVE FOR COLLEGE

100 reasons to save even more.
Add to your college savings and you can get 100% tax-free growth.

[Save More >](#)

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THE CALIFORNIA WAY TO SAVE FOR COLLEGE

How about now?
Start saving for college.

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ScholarShare 529

THE CALIFORNIA WAY TO SAVE FOR COLLEGE

100 reasons to save even more.
Add to your college savings and you can get 100% tax-free growth.

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Low fees on future degrees.
Have more money for college with ScholarShare 529.

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ScholarShare 529

College Countdown Emails

ScholarShare 529 COLLEGE COUNTDOWN

College Prep for 529 Parents

Tips When Borrowing \$\$\$
Watch this video. [Learn More.](#)

Financial Aid
What can get in the way?
[Learn More.](#)

When There's Not Enough \$\$\$
Hacks to close the gap.
[Learn More.](#)

Join the Parent Advisory Council. For more info, email clientsupport@scholarshare.com.

CollegeCountdown.ScholarShare529.com

July

ScholarShare 529 COLLEGE COUNTDOWN

College Prep for 529 Parents

Dorm Room Shopping
10 pro-tips! [Learn More.](#)

Forming Good Habits
5 questions to ask your new freshmen.
[Learn More.](#)

First-Year Friendships
How to help your student make connections.
[Learn More.](#)

Join the Parent Advisory Council. For more info, email clientsupport@scholarshare.com.

CollegeCountdown.ScholarShare529.com

August

ScholarShare 529 COLLEGE COUNTDOWN

College Prep for 529 Parents

College Savings Tips
Insights from a pro! [Learn More.](#)

When Plans Change
What to do with 529 funds.
[Learn More.](#)

You Make A Difference
Reflecting on your 529 investment.
[Learn More.](#)

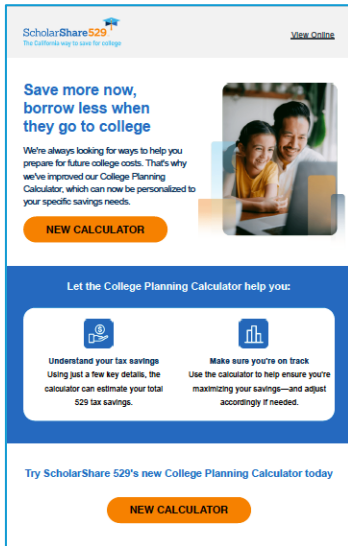
Join the Parent Advisory Council. For more info, email clientsupport@scholarshare.com.

CollegeCountdown.ScholarShare529.com

September

Q3 Creative Examples

Account Owner Engagement Emails



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The California way to save for college

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Save more now, borrow less when they go to college

We're always looking for ways to help you prepare for future college costs. That's why we've improved our College Planning Calculator, which can now be personalized to your specific savings needs.

NEW CALCULATOR

Let the College Planning Calculator help you:

- Understand your tax savings**
Using just a few key details, the calculator can estimate your total 529 tax savings.
- Make sure you're on track**
Use the calculator to help ensure you're maximizing your savings—and adjust accordingly if needed.

Try ScholarShare 529's new College Planning Calculator today

NEW CALCULATOR

July



ScholarShare 529
The California way to save for college

[View Online](#)

So much more than just tuition

Your 529 covers a wide range of educational expenses beyond college tuition, so you're prepared for whatever the future holds.

LEARN MORE

Did you know?
Your 529 can cover a wide variety of qualified higher education expenses.

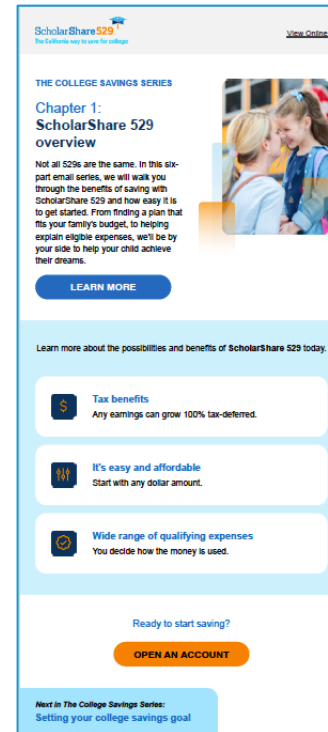
- Certain housing and food-related expenses
- Apprenticeship and trade program expenses
- Computers, software and printers
- Books, fees and supplies
- Repayment of student loans (up to \$10,000 interest per individual federal tax year)

Your 529 savings are yours
If their college plans change, you can simply change beneficiary to another child—or even yourself!

LEARN MORE

August

Inquirer Email



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The California way to save for college

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THE COLLEGE SAVINGS SERIES

Chapter 1: ScholarShare 529 overview

Not all 529s are the same. In this six-part email series, we will walk you through the benefits of saving with ScholarShare 529 and how easy it is to get started. From finding a plan that fits your family's budget, to helping explain eligible expenses, we'll be by your side to help your child achieve their dreams.

LEARN MORE

Learn more about the possibilities and benefits of ScholarShare 529 today.

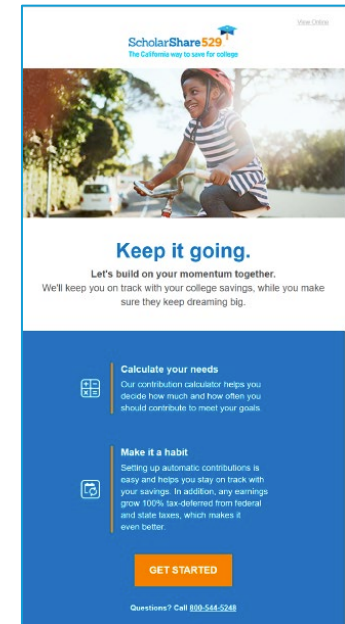
- Tax benefits**
Any earnings can grow 100% tax-deferred.
- It's easy and affordable**
Start with any dollar amount.
- Wide range of qualifying expenses**
You decide how the money is used.

Ready to start saving?

OPEN AN ACCOUNT

Next in The College Savings Series:
Setting your college savings goal

Onboarding Email



ScholarShare 529
The California way to save for college

[View Online](#)

Keep it going.

Let's build on your momentum together. We'll keep you on track with your college savings. While you make sure they keep dreaming big.

Calculate your needs
Our contribution calculator helps you decide how much and how often you should contribute to meet your goals.

Make it a habit
Setting up automatic contributions is easy and helps you stay on track with your savings. In addition, any savings grow 100% tax-deferred from federal and state taxes, which makes it even better.

GET STARTED

Questions? Call 800-544-5248

Holiday Campaign

- Campaign Period: December 4 - 13
- Offer: Get a \$50 Target giftcard when you open a new account with \$50 and set up recurring contributions of \$50+ for 6 months
- Targets
 - Prospects
 - Inquirers
 - Existing Account Owners
- Media
 - Emails
 - Direct Mail
 - Display
 - Landing Page
 - Home Page Module
 - Payroll Stuffer
 - Spanish and English Flyer

ScholarShare 529
The California way to save for college

**Open a new account.
Get a \$50
Target GiftCard.**

Open a new account with at least \$50 and set up recurring contributions of \$50 or more for **six consecutive months** and receive a \$50 Target GiftCard.*

Offer valid December 4 through December 13, 2024.

The ScholarShare 529 College Savings Plan provides 100% tax-deferred growth on investment earnings, and withdrawals are tax-free for qualified expenses.

Target and the Bullseye Design are registered trademarks of Target Brands, Inc. Terms and conditions are applied to gift cards. Target is not a participating partner in or sponsor of this offer.

CA OF

ScholarShare 529
Ahorrar para la universidad al estilo de California

ScholarShare 529 proporciona un crecimiento con impuestos diferidos del 100%. Esto puede significar más dinero para la universidad.

OFERTA POR TIEMPO LIMITADO

Abra una cuenta nueva y obtenga una Target GiftCard.

Abra una nueva cuenta con ScholarShare 529 con al menos \$50, establezca contribuciones mensuales automáticas de \$50 o más durante **seis meses consecutivos** y reciba una Target GiftCard.*

Oferta válida entre el 4 y el 13 de diciembre de 2024.

ScholarShare529.com/offer24 800-544-5248

FAD-XXXXXXXXXXXX

ScholarShare 529 TIAA

*Si abre una cuenta nueva para el plan de ahorros universitarios de ScholarShare 529 con una contribución de \$50 (y se registra para contribuciones recurrentes de \$50 o más por mes) durante seis meses consecutivos entre el 4 de diciembre de 2024 a las 12:01 a.m. y el 13 de diciembre de 2024 a las 8:59 p.m. (PT) recibirá por correo una tarjeta de regalo de \$50 a más tardar el 30 de julio de 2025. Visite ScholarShare529.com/offer24 para conocer los términos, condiciones y detalles. No está permitido el reembolso o reemplazo por falta. Para más información sobre ScholarShare 529 de California, consulte con su asesor financiero. Para obtener más información sobre ScholarShare 529 de California, sus objetivos de inversión, beneficios impositivos, riesgos y costos, consulte la descripción del plan en el sitio web ScholarShare529-Espanol.com. Lea con atención. Consulte con su estado de residencia para saber si esta oferta beneficia impositivos o de otro tipo, como ayuda financiera, bonos o protección de acreedores por invertir en su plan 529. Consulte con su asesor legal o fiscal para recibir asesoramiento impositivo. Las inversiones en el plan no están sujetas al patrimonio y están exentas de pérdidas de inversión. Si los fondos no se utilizan para gastos educativos de educación superior, se puede aplicar una multa impositiva Federal del 10% sobre las ganancias (además de los impuestos Federales y estatales a los ingresos). Los retiros no calificados también pueden estar sujetos a un impuesto adicional de California del 2.9% sobre las ganancias. TIAA-CREF Tuition Financing, Inc. (TIAA-CREF) Individual & Institutional Services, LLC, miembro de FINRA, distribuidor y asesor del plan ScholarShare 529 de California. Target y The Bullseye Design son marcas comerciales registradas de Target Brands, Inc. Los términos y condiciones se aplican a las tarjetas de regalo. Target no es un socio participante ni patrocinador de esta oferta.

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**Open a new account.
Get a \$50
Target GiftCard.**

Open a new account with at least \$50 and set up recurring contributions of \$50 or more for **six consecutive months** and receive a \$50 Target GiftCard.* Offer valid December 4 through December 13, 2024.

[LEARN MORE](#)

Click here for details and official rules.

ScholarShare 529
The California way to save for college

**There's still
time to
get your \$50
Target GiftCard.***

Open a new account with at least \$50 and set up recurring contributions of \$50 or more for **six consecutive months** and receive a \$50 Target GiftCard.* Offer valid December 4 through December 13, 2024.

[CREATE ACCOUNT](#)

Click here for details and official rules.

Public Relations: Q3 Recap



Media relations initiatives through our PR agency drive coverage in print, online, and in broadcast. These mentions help prospects become familiar with our brand name and brand attributes.

Category	Q1 2024	Q2 2024	Q3 2024	Insights
Mentions among top 10 direct-sold 529 plans	ScholarShare 529 was mentioned 221 times (21%) in the media nationally reaching over 309 million readers/viewers.	ScholarShare 529 was mentioned 385 times (19%) in the media nationally reaching over 570 million readers/viewers.	ScholarShare 529 was mentioned 98 times (19%) in the media nationally reaching over 371 million readers/viewers.	Coverage received for ScholarShare’s Summer Promotion. English and Spanish media outlets are covering the brand regularly.
Competition	The most frequently mentioned plan was New Mexico’s “The Education Plan” with 425 mentions (40% of mentions), followed by ScholarShare with 221 mentions (21%) and Virginia’s Invest529 plan with 129 mentions (12%).	The most frequently mentioned plan was New Mexico’s “The Education Plan” with 672 mentions (34% of mentions), followed by Oregon College Savings Plan with 489 mentions (25%) and ScholarShare with 385 mentions (19%).	The most frequently mentioned plan was Virginia’s Invest529 plan with 134 mentions (27% of mentions), followed by New Mexico’s “The Education Plan” with 120 mentions (24%), and ScholarShare with 98 mentions (19%).	Coverage of the various college saving plans increased during the second quarter nationwide.

Public Relations: Q3 Recap



Press Releases Distributed:

- Sept 5 - Celebrate Grandparents Day by Investing in Your Grandchild's Future with ScholarShare 529
- Sept 17 - CalKIDS Fresno County Press Release
- Sept 19 - CalKIDS Kern County Press Release
- Sept 24 - CalKIDS San Bernadino County Press Release

Interviews with Patricia Roberts:

- Bonneville Sacramento
- iHeart LA
- Mt. Wilson Los Angeles
- Audacy Sacramento

Celebrate Grandparents Day by Investing in Your Grandchild's Future with ScholarShare 529

September 05, 2024 09:00 AM Eastern Daylight Time

SACRAMENTO, Calif.--(BUSINESS WIRE)--As we celebrate Grandparents Day this Sunday, September 8, families are reminded of the invaluable role that grandparents can play in supporting and shaping their grandchildren's future. This year, ScholarShare 529 invites grandparents to extend that support to their grandchild's education by opening a ScholarShare 529 account and providing a powerful gift that will benefit them for years to come.

"Opening a 529 account provides an opportunity for grandparents to not only give but to receive as well"

Post this

ScholarShare 529 is California's official tax-advantaged college savings plan, designed to help families save for higher education expenses in a flexible and tax-efficient manner. By opening a ScholarShare 529 account, grandparents can contribute regularly to a child's educational journey, easing potential financial burdens and supporting their academic achievements.

Recent Free Application for Federal Student Aid (FAFSA) rules have made opening a ScholarShare 529 account even better. Starting with the 2024-2025 school year, distributions from grandparent-owned 529 plans are no longer reported as student income and not considered when calculating a family's expected contribution. This means that withdrawals from a ScholarShare 529 account owned by grandparents won't negatively impact the student's federal financial aid eligibility and broadens the base of support for the student's future.

"Opening a 529 account provides an opportunity for grandparents to not only give but to receive as well," says Patricia Roberts, Chief Operating Officer at Gift of College, Inc., and author of Route 529: A Parent's Guide to Saving for College and Career Training with 529 Plans. "In addition to receiving the valuable tax benefits associated with these accounts, grandparents receive the benefit of a meaningful connection to their grandchild's academic and career dreams, whatever they may be."

Why Else Should You Choose ScholarShare 529?

- **Tax Benefits:** Contributions to a ScholarShare 529 account grow tax-free, and withdrawals for qualified educational expenses are also tax-free.
- **Easy to Set Up:** Opening an account is simple and can be done online in less than 15 minutes. You can start with as little as \$1, set up a contribution schedule or simply contribute when you want to, and there are no annual fees.
- **Control and Flexibility:** Account holders retain control over the account and can change beneficiaries if needed. Grandparents who don't want to open an account themselves, can contribute to parent or student-owned ScholarShare 529 accounts easily with [Ugift](#).

To open a ScholarShare 529 account, visit ScholarShare529.com/open. For a helpful step-by-step video on how to get started, [click here](#). In just a few minutes, you'll be on your way to setting up a ScholarShare 529 account and providing a valuable gift for your grandchild's educational journey.

ScholarShare 529 – Q3 2024 Social Media

- Q3 social media focused on National Financial Freedom Day, Grandparents Day, and Back-to-School, emphasizing the importance of early savings through account openings and gift contributions. Additionally, College Countdown was highlighted. Metrics primarily reflect organic reach, with minimal paid support for College Countdown and the Summer Promotion.
- Live webinar announcements and short-form content were the top performers across all platforms.
- LinkedIn experienced higher user engagement, especially with College Countdown content.
- We received significant support from financial literacy advocates and advocacy organizations, highlighting their own efforts to promote the plan.

Total

Followers - 76,718

Reach - 277,092

Impressions - 1,094,296

Trackable Mentions - 419

Trackable Website Visits - 6,837



Facebook (English)* paid one month

- Followers - 60,142
- Reach - 208,415
- Impressions - 1,015,973
- Trackable Mentions - 199
- Trackable Website Visits - 6,250



Facebook (Spanish)

- Followers - 12,151
- Reach - 342
- Impressions - 511
- Trackable Mentions - 23
- Trackable Website Visits - 18



Twitter/X

- Followers - 2,828
- Reach - 5,813
- Impressions - 4,771
- Trackable Mentions - 66
- Trackable Website Visits - N/A



LinkedIn

- Followers - 367
- Impressions - 3,703
- Trackable Mentions - 72
- Trackable Website Visits - 97



Instagram

- Followers - 1,039
- Reach - 62,522
- Impressions - 69,338
- Trackable Mentions - 59
- Trackable Website Visits - 472



Threads* Native Analytics not available

- Followers - 191

Employer Outreach – Q3 2024

New WPS Partners:

1. City of Santa Clara
2. City of Pleasant Hill
3. City of La Quinta
4. La Sierra University
5. ReelGood
6. Siegfried
7. San Bernardino County
8. City of San Bernardino
9. City of Wildomar
10. City of Coronado
11. Penn Charter
12. Sac Sewer
13. Archdiocese of Los Angeles
14. Planning & Landscape Architecture
15. SPG Therapy and Education
16. Family Support Center
17. Comprehensive Autism Center
18. ABRITE
19. Behavior Therapy Clinic
20. Islands Restaurants
21. Beach Cities Health District
22. The Law Offices of David M. Lederman
23. City of Santa Clarita
24. The California Endowment
25. City of Solana Beach
26. City of South Pasadena
27. Mobility Management Partners
28. Sacramento Housing and Redevelopment Association (SHRA)
29. Catholic Cemeteries & Mortuaries Archdiocese of Los Angeles
30. Education (Department of Catholic Schools) Archdiocese of Los Angeles

Field Consultant Activity

WPS Introductory Meetings	26
WPS Employee Webinars	27
Benefits Fair	32
One-on-One Consumer Consultations	195
ScholarShare Consumer Webinars	6
ScholarShare HR Webinar	5
AUM Support Through Education	\$3,883,110

RIA Field Consultant Activity

Financial Planning Association networking events (Orange County and San Francisco)	7
------------------------------------------------------------------------------------	---



Outreach Events Summary

SIB Staff and the TIAA Field Consultant Team attended the following events in Q3 to promote ScholarShare 529 and CalKIDS to California families.

Number of Events	Estimated Number of Attendees	List of Select Events
184	37,000	CalState LA, City of Carlsbad, California Special Districts Association, Nevada County, NextGen Financial Planning, FIERCE Advocates, Employee Development Department, CalPERS, Ventura County, Cerritos College, Monterey County Office of Education, La Sierra University, Thai Community Development Center, California Department of Public Health, Discover Champions, Twin Rivers Unified School District, Sacramento Charter High School, Department of Transportation District 7, A Community of Friends, Department of Social Services - Tribal Affairs, California State University, Hope the Mission, The Haverford School, Franchise Tax Board

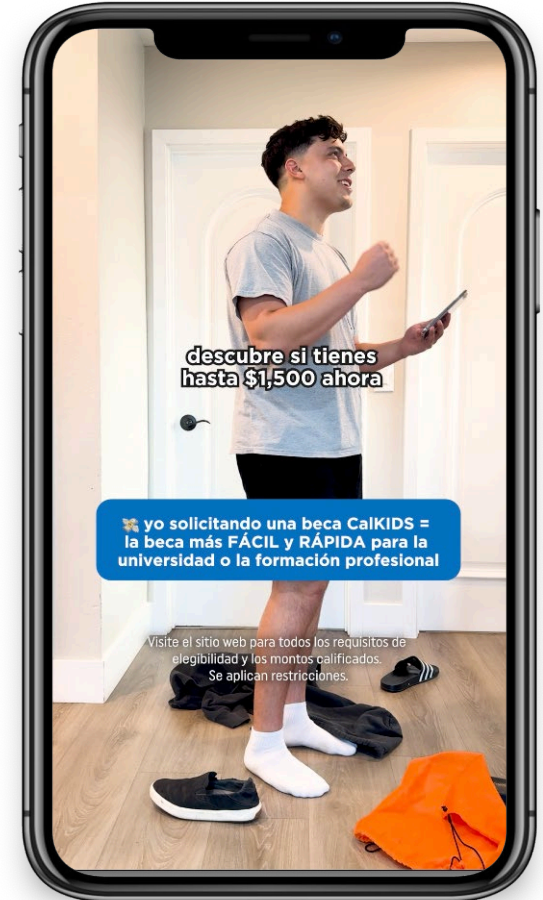
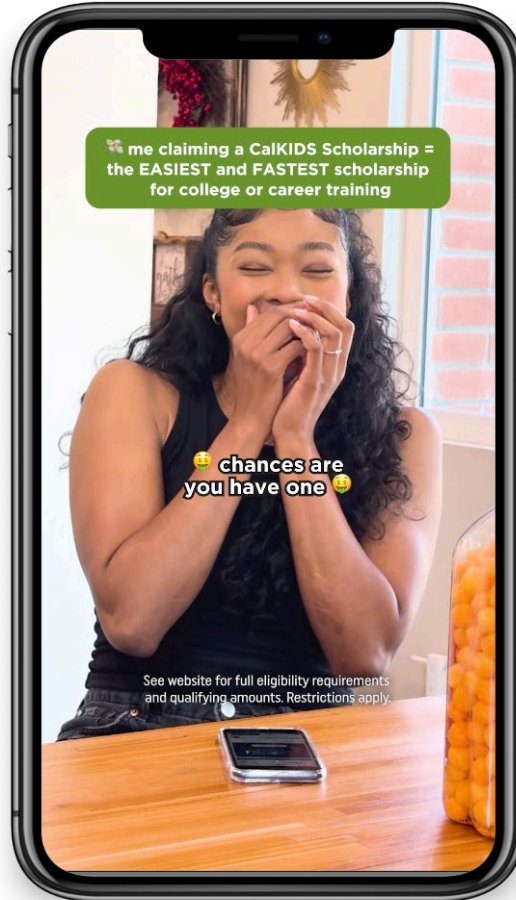
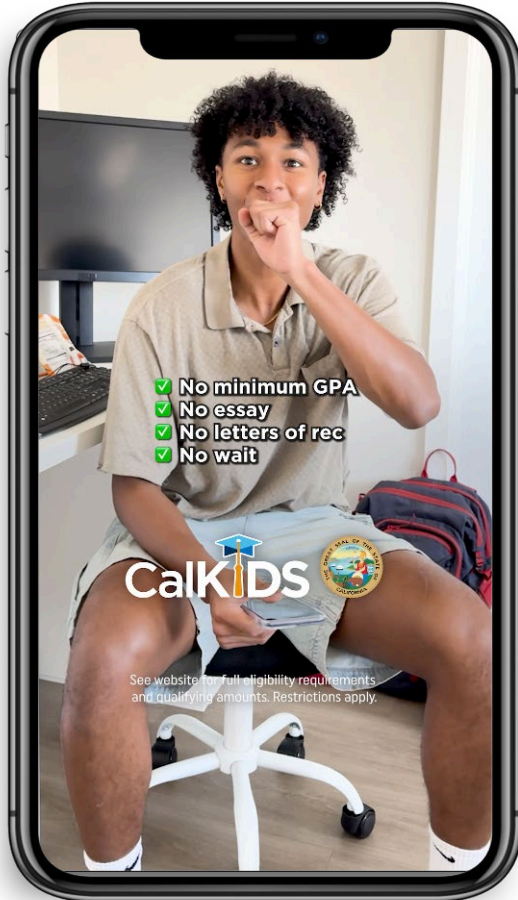
CalKIDS 2024 Marketing Plan – Q3 Achievements



	Goal	Strategy	Achievements
1	Increase CalKIDS brand awareness	Through a mix of mediums and platforms, continue to build CalKIDS brand familiarity and program trust among target audiences statewide.	<ul style="list-style-type: none"> Q3 Back-to-School Campaign creative included assets for: Social Media video (Facebook/Instagram), Programmatic Display, Spotify Audio and a dedicated landing page. Peachjar Email Newsletter to families of High School Seniors. Back-to-School PR initiative in top 10 counties Ongoing CalKIDS Alumni outreach
2	Increase CalKIDS program engagement and participation	Continue to implement and support direct-to-consumer methods to boost engagement and drive CalKIDS accounts claimed, linked ScholarShare 529 accounts, and distributions.	<ul style="list-style-type: none"> Q3 Owned Social strategy, content, and community management. Development of Social Media posts for Governor Newsom and Governor’s Office New SSID + LRN Eligibility Tools for Partners Development of new tutorial videos for Claiming, Linking and Requesting a Distribution New Account Services Webform Development of an Influencer Program pilot designed to seed the CalKIDS scholarship for National Scholarship month
3	Grow program through strategic partnerships and outreach activities	Support the State’s efforts to strengthen and expand tactical partnerships and outreach activities to gain access to additional prospective participants, drive program growth and provide legitimacy to the CalKIDS brand.	<ul style="list-style-type: none"> Back-To-School Toolkit for Partners Ongoing Stakeholder interviews w/ partners across higher ed, high school, 1st – 8th. New Marketing Toolkit + Co-Branded Assets i.e., Newborn Claim Flyer, Video Billboard “Partner Profile” content and Event highlights for owned social. CalKIDS Impact Report

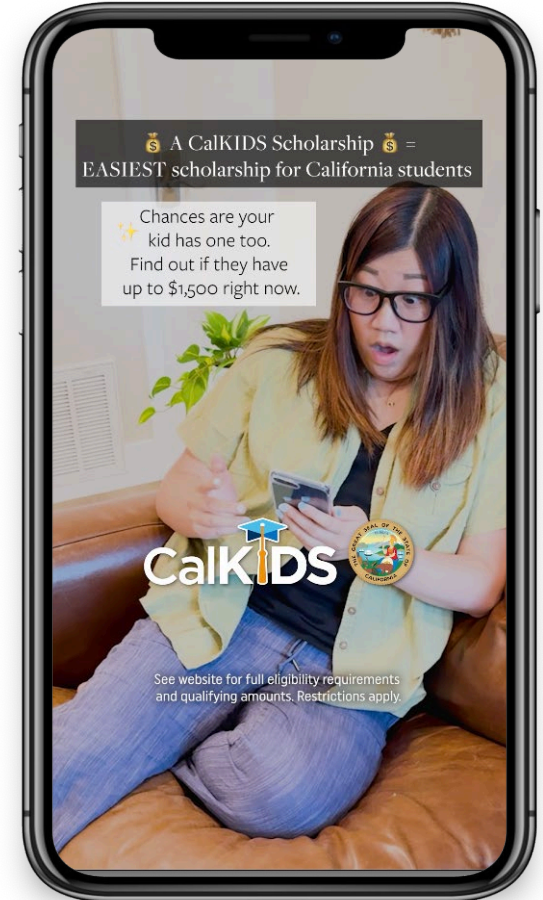
Back-to-School Campaign (Students)

- ✓ Creative targeting high school seniors and early college students leveraged the latest social media trends/formats; and positioned CalKIDS as something they were looking for – “a scholarship.”



Back-to-School Campaign (Parents + Educators)


- ✓ Creative was also developed for paid media targeted to parents, academic counselors, and education administrators




Back-to-School Campaign Banners (All Audiences)

**The easiest
and fastest
scholarship.**

**Chances are
you have one!**



CalKIDS 

Find out right now!

See website for full eligibility requirements and qualifying amounts. Restrictions apply.

**La beca
más fácil
y rápida.**

**¡Es posible que
tengas una!**



CalKIDS 

¡Descúbrelo ahora!

Visita el sitio web para todos los requisitos de elegibilidad y los montos calificados. Se aplican restricciones.

The easiest and fastest scholarship.

Chances are you have one!  **Find out right now!** 

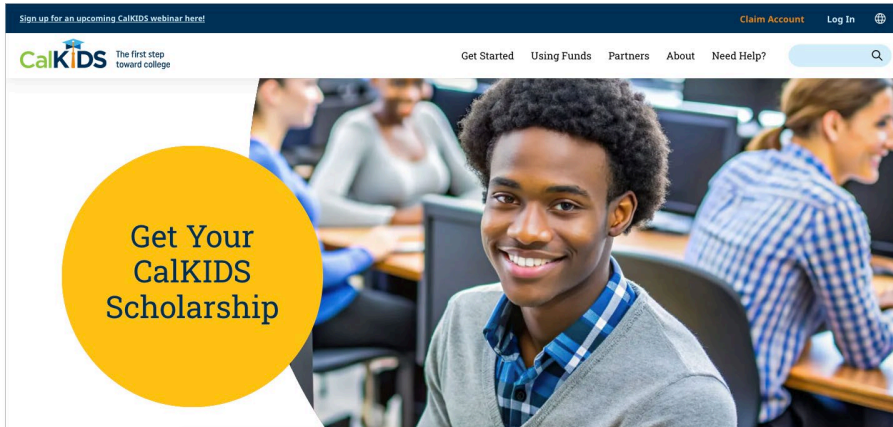
See website for full eligibility requirements and qualifying amounts. Restrictions apply.

La beca más fácil y rápida.

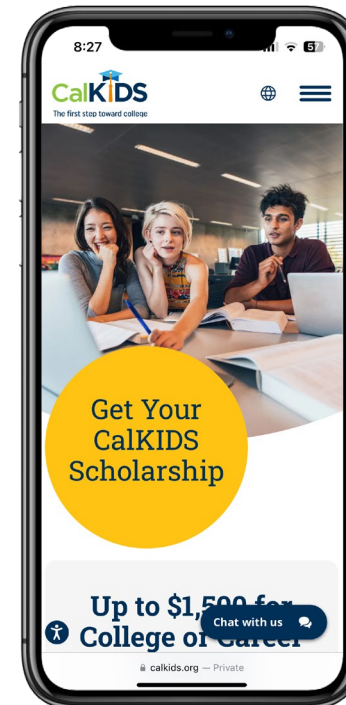
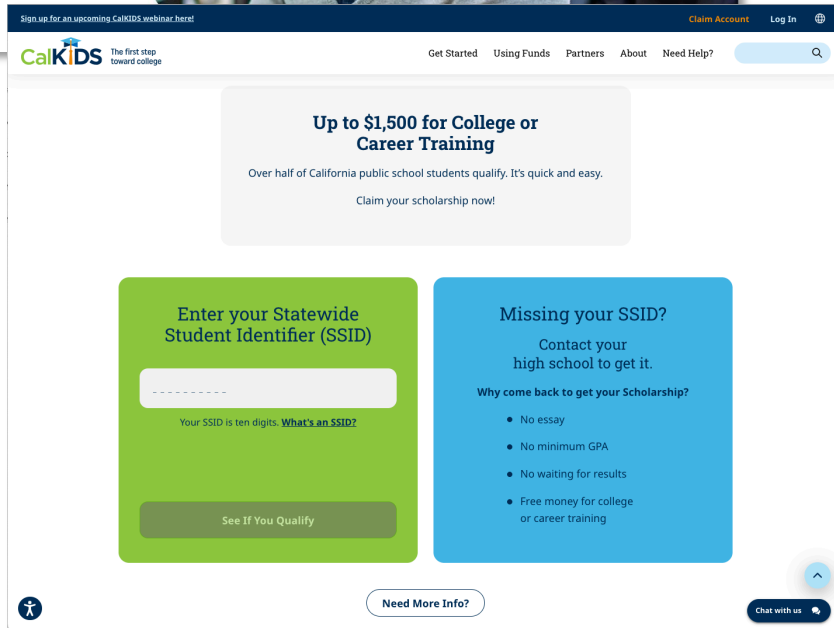
¡Es posible que tengas una! **¡Descúbrelo ahora!**  

Visita el sitio web para todos los requisitos de elegibilidad y los montos calificados. Se aplican restricciones.

Back-to-School Campaign Landing Page



- ✓ Paid media drove to a custom CalKIDS.org/scholarship landing page where visitors could quickly check their eligibility and claim their accounts



PeachJar Email Newsletter

Does your student have a CalKIDS Scholarship waiting for them?

More than 60% of California's public school students do!

With a CalKIDS Scholarship your student could receive \$500 to \$1,500 for college or career training.

Getting a scholarship has never been so easy:

- No minimum GPA
- No essay
- No questions about income or assets
- No waiting

CalKIDS
The first step toward college

Find out instantly if your student



¿Tiene su estudiante una beca CalKIDS que espera ser solicitada?

¡Más del 60% de los estudiantes de las escuelas públicas de California tienen una!

Con una beca CalKIDS, su estudiante podría recibir entre \$500 y \$1,500 para la universidad o capacitación profesional.

Conseguir una beca nunca ha sido tan fácil:

- Sin GPA mínimo
- Sin ensayo
- Sin preguntas sobre ingreso o bienes
- Sin espera

CalKIDS
El primer paso hacia la universidad

Descubra si su estudiante tiene una en CalKIDS.org/scholarship.



*Student eligibility is defined by the Local Control Funding Formula. The California Kids Investment and Development Savings Program (CalKIDS) is a program of accounts of savings for the future, administered by the State of California's Scholarship Investment Board, an agency of the State of California, to help more about CalKIDS or opt out of the program entirely, please see the PI may also establish individual accounts with ScholarShare 529, California.

- ✓ Peachjar email newsletter deployed in August to ~400K+ parents of high school seniors in both English and Spanish.

Back-to-School PR



The screenshot shows a news article on the KERN SOL NEWS website. The article title is "CALKIDS ALLOCATES OVER \$80 MILLION TO SUPPORT STUDENTS' EDUCATIONAL FUTURES". The author is Victoria Rodgers, and the date is October 4, 2024. The article features a photo of several young children with backpacks. The text in the article states: "In an effort to help more families in Kern County access higher education, the California Kids Investment and Development Savings Program (CalKIDS) is offering up to \$1,500 in free funds for eligible students. Approximately 74% of Kern County's public school students from the last three academic years qualify for this financial support, with over \$80 million in funding already set aside."

- ✓ A PR campaign was created to personalize the benefit of CalKIDS for our top 10 counties with the highest eligibility rates

Back to School Toolkits



Colleges across California have an unprecedented opportunity to help students claim their share of \$1.9 billion in CalKIDS scholarships.

Did you know?

- 60%+ of California's public school students are eligible for a CalKIDS scholarship worth \$500 to \$1,500.
- Students can check their eligibility in seconds and then quickly claim their account?

Importance of the Statewide Student Identifier (SSID):

Students will need their SSID. Information can be found by contacting:

While the following tactics are proven to drive CalKIDS scholarship claims, we do encourage schools and school districts to find new opportunities for helping students claim their accounts.

Influence Your Influencers

Creating opportunities for principals, counselors, communications officers, teachers, parent coordinators, and relevant staff to learn more about the CalKIDS program is a great way to scale your local efforts. You can request a presentation with a ScholarShare Investment Board (SIB) staff member at CalKIDS.org

Encourage Students to Check Their Eligibility

Counseling appointments, orientation events, and other school events are great opportunities to encourage students to check their eligibility. Students and staff can check their eligibility on the CalKIDS website.



Schools and school districts across California have an unprecedented opportunity to help students claim their share of \$1.9 billion in CalKIDS scholarships.

Did you know...

- 60%+ of California's public school students are eligible for a CalKIDS scholarship worth \$500 to \$1,500?
- students can check eligibility in seconds and then quickly claim their account?

While the following tactics are proven to drive CalKIDS scholarship claims, we do encourage schools and school districts to find new opportunities for helping students claim their accounts.

Access to Statewide Student Identifier (SSID)

A student's SSID is needed to check their CalKIDS scholarship eligibility and claim their account. Making student SSIDs readily accessible is a critical step in making the process easy for students and families. Here are some ways school and school districts have successfully increased access to SSIDs:

- Designate staff members to provide SSIDs at school events, in class, and upon request.
- Make SSIDs available on student and/or parent portals for quick, anytime access.

Designate Time for Students to Check Their CalKIDS Eligibility

Students, families, and staff can check eligibility in seconds using the [SSID Eligibility Tool](#) on the CalKIDS website. The following are some ways schools and school districts have created opportunities for students and families to check their CalKIDS scholarship eligibility:

- **Counseling appointments**
- **In the classroom** - This is especially relevant for AVID and college or career preparation classes.
- **When discussing financial aid** - For example when students complete their FAFSA.
- **At Back-to-School/Orientation Events**

Influence Your Influencers

Creating opportunities for principals, counselors, communications officers, teachers, parent coordinators, and relevant staff to learn more about the CalKIDS program is a great way to scale your local efforts. You can request a presentation with a ScholarShare Investment Board (SIB) staff member at CalKIDS.org

- ✓ Back-to-School "Toolkits" were created for colleges, school districts, and schools to help drive partner support on the ground.

Marketing Toolkit Assets + Co-Branded Assets

- ✓ Ongoing development of new Marketing Toolkit assets based on partner needs/requests.

Claim your child's free college savings account!

What you need to know ...

CalKIDS provides all California newborns born on or after July 1, 2022 with **up to \$175** in free money for future college expenses.

Your child may already have a CalKIDS account established in their name. Claiming their account is quick and easy! Visit CalKIDS.org and have the information listed below handy.



What you'll need to claim your account:

- The county where the child was born
- Child's **date of birth**
- Local Registration Number (LRN)** - found on your child's birth certificate

CERTIFICATE OF LIVE BIRTH
STATE OF CALIFORNIA







Claim your account today!

The California Kids Investment and Development Savings Program (CalKIDS) is a children's savings account program, administered by the ScholarShare Investment Board, an agency of the State of California. CalKIDS will provide eligible participants with college savings accounts, including seed deposits and other potential incentives, to help pay for future qualified higher education expenses. To learn more about CalKIDS or opt out of the program entirely, please see the Program Information Guide at CalKIDS.org. CalKIDS participants may also establish individual accounts with ScholarShare 529, California's College Savings Plan.



Getting a scholarship has never been so easy!

With a CalKIDS Scholarship, you could receive \$500 to \$1,500 for college or career training.

Did you attend public school in California? Chances are you have one!

- No minimum GPA
- No essays
- No letters of recommendation
- No waiting



Find out instantly if you have one at CalKIDS.org/scholarship

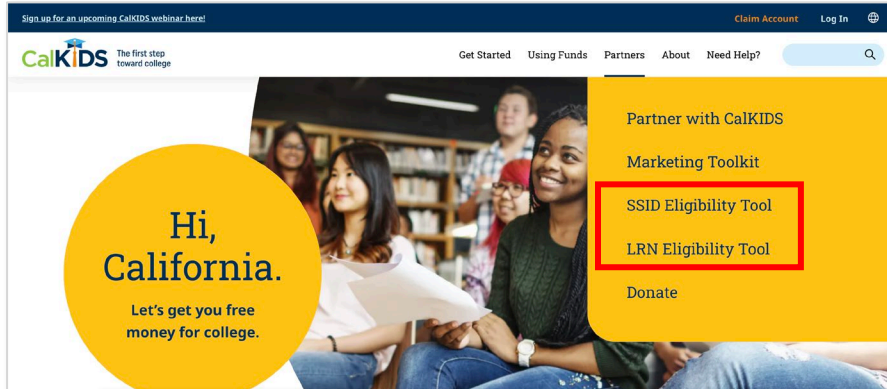
*Student eligibility is defined by the Local Control Funding Formula. The California Kids Investment and Development Savings Program (CalKIDS) is a children's savings account program, administered by the ScholarShare Investment Board, an agency of the State of California. CalKIDS will provide eligible participants with college savings accounts, including seed deposits and other potential incentives, to help pay for future qualified higher education expenses. To learn more about CalKIDS or opt out of the program entirely, please see the Program Information Guide at CalKIDS.org. CalKIDS participants may also establish individual accounts with ScholarShare 529, California's College Savings Plan.



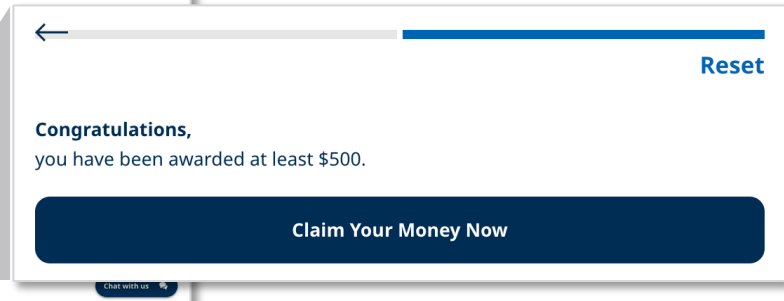
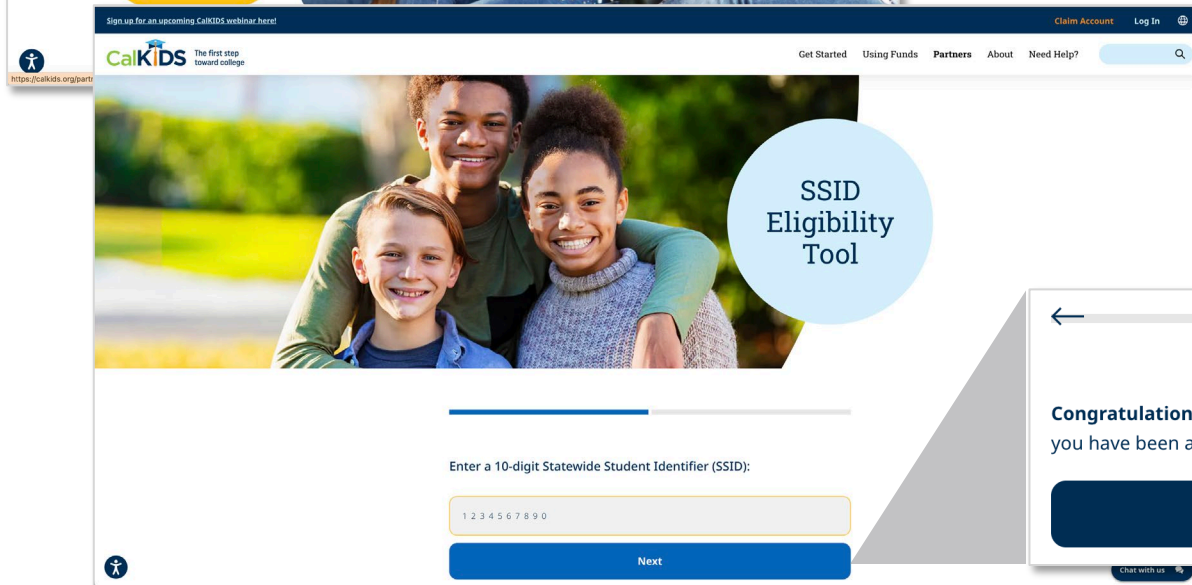

Co-Branded Madera Community College Video Boards

Newborn Claim Flyer

SSID + LRN Eligibility Tools for Partners



- ✓ An abbreviated version of the eligibility tool was created for partners; increasing their efficiency in helping families check eligibility and claim accounts.



Account Services Web Form

✓ The Account Services webform was updated to address a more diverse number of use cases.

3. Signature And Authorization

By signing below, I attest that I am a CalKIDS Beneficiary (award recipient, if 18 years of age or older) or the parent/legal guardian of a CalKIDS Beneficiary with authority to act on their behalf and that in such capacity I possess the legal right to authorize changes be made to my CalKIDS Account, as requested on this form, and have enclosed the required documentation.

Under penalty of perjury and the laws of the state of California, I affirm that I am authorized to execute this attestation and declare that such authority and the statements made within it are true and correct.

I understand that the CalKIDS Program's reliance on this attestation is binding and final.

I further understand that false statements may result in legal action.

Signature (Please print and hand sign or digitize)

Print Full Legal Name of CalKIDS Beneficiary

All forms must be either hand signed or digitized. Mail this completed form to:
 ScholarShare Investment Board
 Attention: CalKIDS
 PO Box 942809
 Sacramento, CA 94209-0001
 Program Administered by the ScholarShare Investment Board

CalKIDS Account Services Form

Please complete this form if you would like to request a name or birth date change, opt out of program communications, or are experiencing account access issues.

Instructions

- You must provide all of the requested information in Section 1, applicable information in Section 2, and your signature in Section 3.
- You must print, hand sign or digitally sign this document, and mail this completed form to ScholarShare Investment Board, Attention: CalKIDS, PO Box 942809, Sacramento, CA 94209-0001
- You should retain a copy for your records.

Questions? Visit www.CalKIDS.org or call toll-free 888-445-2377 for information or assistance.

1. Current CalKIDS Beneficiary Information

Complete the required information below to identify the CalKIDS Beneficiary:

Beneficiary First Name	Beneficiary Middle Name (if applicable)	Beneficiary Last Name
Beneficiary Date of Birth	Beneficiary State of Birth	Phone Number

Email Address

<p>For at birth recipients, complete this section:</p> <p>Local Registration Number (LRN) found on child's birth certificate</p> <p>County of Birth* <small>*For beneficiaries born after July 1, 2022</small></p>	<p>For students, complete this section:</p> <p>Statewide Student Identifier (SSID)</p> <p>County of School, as of applicable Fall Academic Census Date[†] <small>[†]Fall Academic Census Day is a day within the Academic Year on which an official count is taken. The Fall census day is the first Wednesday in October. Students identified in 1st - 12th grade in 2021-22 should use the county in which they attended school on October 6, 2021. Students identified in 1st grade in subsequent years should use the county in which they attended school on the applicable Fall Academic Census Day.</small></p>
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2. CalKIDS Account Change Request

Please proceed with the following request:

Updated Beneficiary Name*
 Name as currently shown in CalKIDS Portal _____
 State File Number and/or Local Registration Number (LRN) _____
 Please provide the last name for all parents listed on the child's most recent birth certificate.
 Parent 1 Last Name (as listed on child's birth certificate) _____ Parent 2 Last Name (as listed on child's birth certificate) _____

Updated Beneficiary Date of Birth* _____

Updated Beneficiary County _____

Opt Out of Program Communications (Circle) Mail Email

CalKIDS Account Portal Reset** (in cases where a CalKIDS beneficiary is unable to access their account)

* Updates to beneficiary names or dates of birth may require additional documentation. A representative will reach out to you if needed.
 ** This may be accepted on a case-by-case basis following a review of the operational needs. A program representative will reach out to you via email to review and complete this process at a scheduled time.

CalKIDS – Q3 2024 Social Media

In Q3 2024, we introduced a creative refresh for CalKIDS content. This update highlighted our tabling efforts, partnerships, registrant milestones, and educational insights about the program—all delivered in a fresh, engaging way. Our messaging emphasized the importance of claiming accounts. Additionally, a Back-to-School paid media campaign boosted our organic social performance.

Total

Followers - **8,867**

Reach - **5,300,581**

Impressions - **11,658,446**

Trackable Mentions - **1,455**

Trackable Website Visits - **89,247**



Facebook (English) *Supported by Paid

- Followers - 1,689
- Reach - 2,381,530*
- Impressions - 4,369,901*
- Trackable Mentions - 619
- Trackable Website Visits - 58,032*



Twitter/X

- Followers - 170
- Reach – 14,709* Gov Tweet
- Impressions - 446
- Trackable Mentions - 53
- Trackable Website Visits - N/A



LinkedIn

- Followers - 408
- Impressions - 7,715
- Trackable Mentions - 93
- Trackable Website Visits - 371



Instagram *Supported by Paid Efforts

- Followers - 5,670
- Reach - 2,875,370*
- Impressions - 7,267,578*
- Trackable Mentions - 690
- Trackable Website Visits - 30,844*



Threads* Native Analytics not available

- Followers - 483



YouTube

- Subscribers - 447
- Views - 28,972
- Impressions - 12,826

Appendix

2024 Marketing Budgets

Category	2024 Budget	Spending through September 30, 2024
ScholarShare 529	\$10,000,000	\$8,156,699
CalKIDS	\$1,000,000	\$538,703
CalKIDS Incentives	\$450,000	\$450,000
Total	\$11,450,000	\$9,145,402

ScholarShare 529:

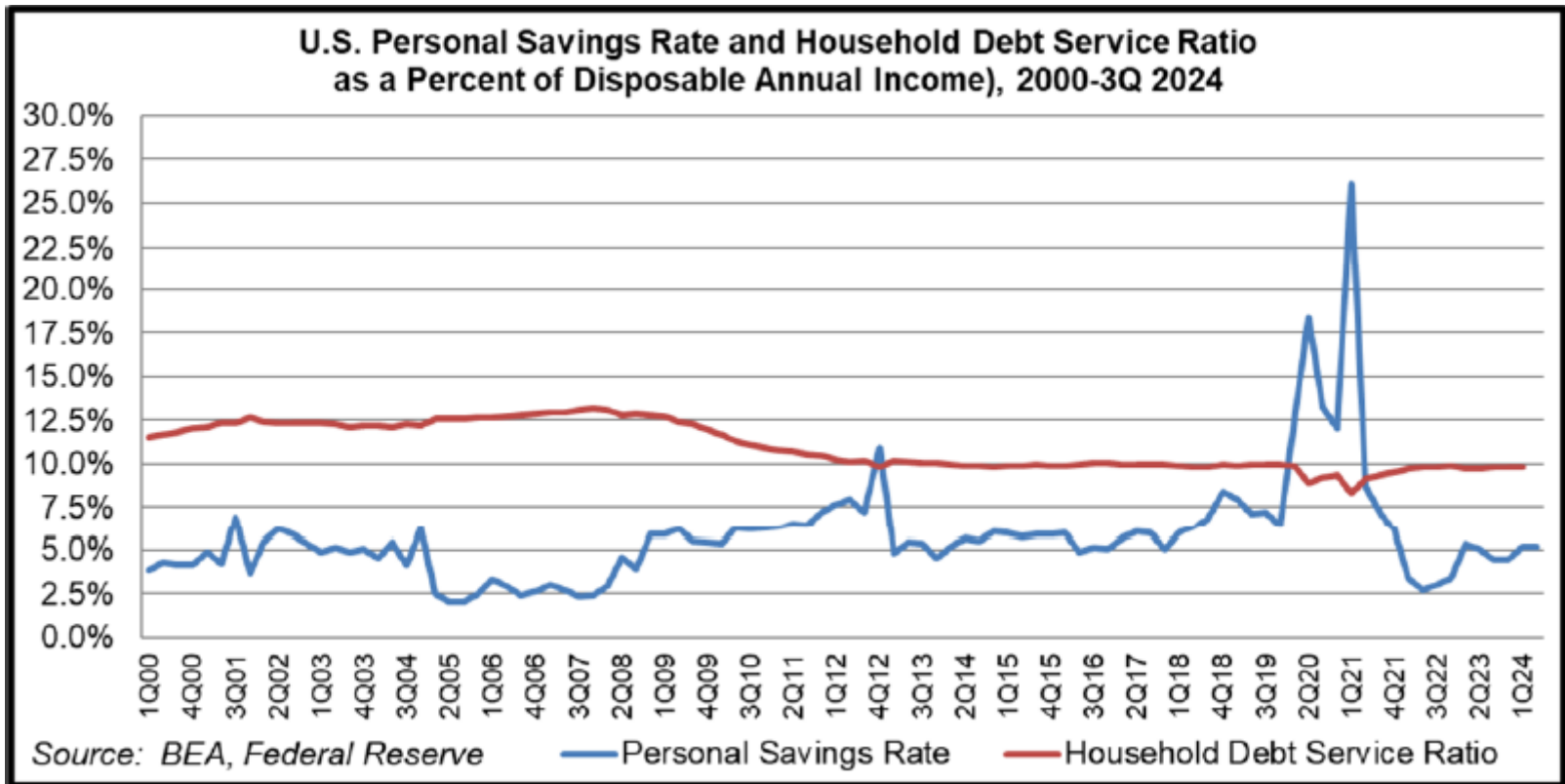
Category	Spending thru 9/30/24
Direct Marketing (DM, EM, Search, Display)	\$ 5,171,996
Mass Media/OTT	\$ 1,279,777
Agency Staff	\$ 856,106
Incentives	\$ 427,245
Public Relations	\$ 159,793
Giveaways	\$ 123,046
Fulfillment	\$ 57,972
Website	\$ 39,596
Social Media	\$ 36,945
Research	\$ 2,701
Trademark	\$ 1,523
	\$ 8,156,699

CalKIDS:

Category	Spending thru 9/30/24
Agency/Staff - Creative & Project Management	\$ 474,744
Public Website Hosting	\$ 32,694
Letters to Schools	\$ 9,279
Events Supplies	\$ 8,634
Printed Collateral	\$ 6,853
Spokesperson	\$ 6,500
TOTAL	\$ 538,703


Personal Savings Rate

Current economic and world conditions continue to create hesitancy among prospects in our sales pipeline.



Source: ISS 529 Quarterly Update 3Q 2024


ScholarShare 529 Social Media: Q3 Facebook Samples

 **ScholarShare California's 529 College Savings Plan** is in **California**.
Published by Instagram
· July 8 ·

Curious about what a 529 plan can do for your child and your family? You can never start saving for college too early and ScholarShare 529 could help! Get your questions answered by joining our live webinar on July 10th, from 11:00am to 12:00pm PST to learn more. RSVP required at [ScholarShare529.com/events](https://www.scholarshare529.com/events) so secure your spot today!




Is ScholarShare 529 right for you and your family?
Learn more at our live webinar at

 **ScholarShare California's 529 College Savings Plan**
Published by Instagram
· August 15 ·

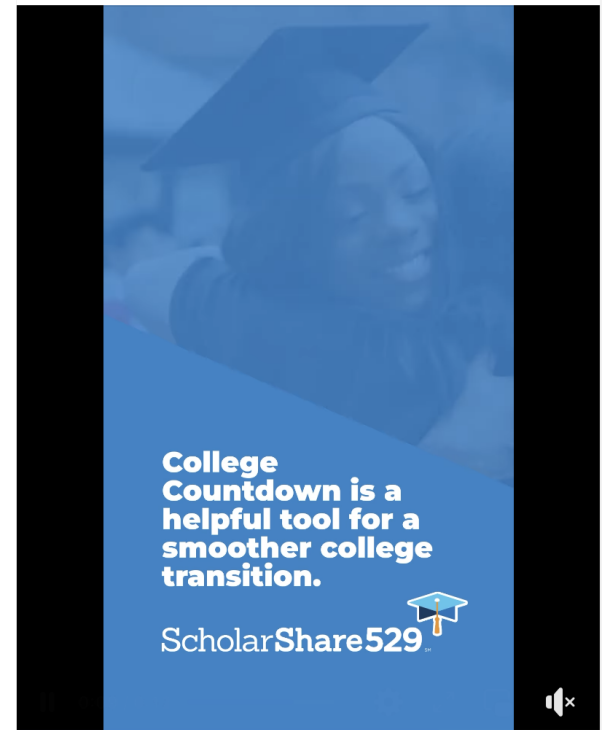
Summer is coming to a close but there is still time to start saving for college when you open a new ScholarShare 529 account! Get a \$25 bonus with an initial deposit of \$250 now through August 30, 2024. Use promo code: Summer25. Open a new account now at [ScholarShare529.com/Summer25!](https://www.scholarshare529.com/Summer25!)— in San Diego County, California.



Make the most of summer.
Save with ScholarShare 529!
Get an extra \$25 when you open a new account.
Open a new account with an initial deposit of \$250 and get a \$25 bonus in your account when you use the promo code: Summer25

 **ScholarShare California's 529 College Savings Plan** is in **California**.
Published by Instagram
· August 12 ·

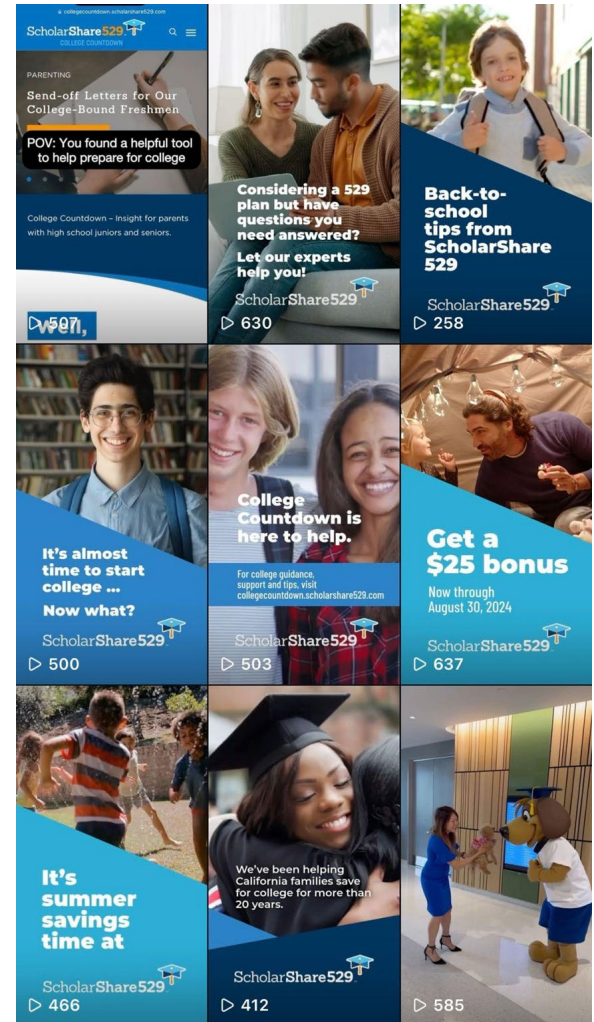
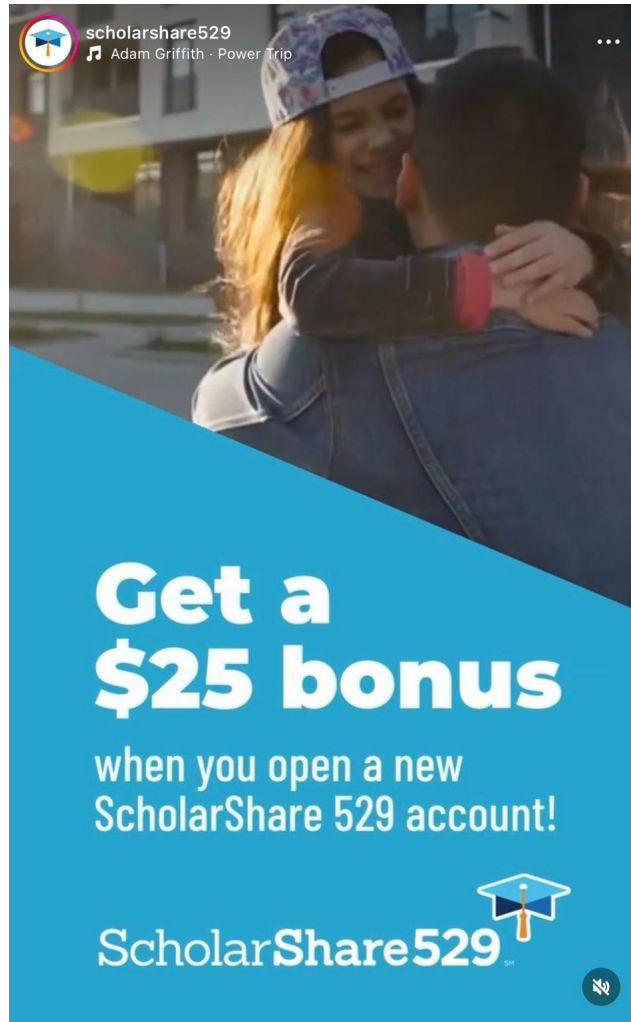
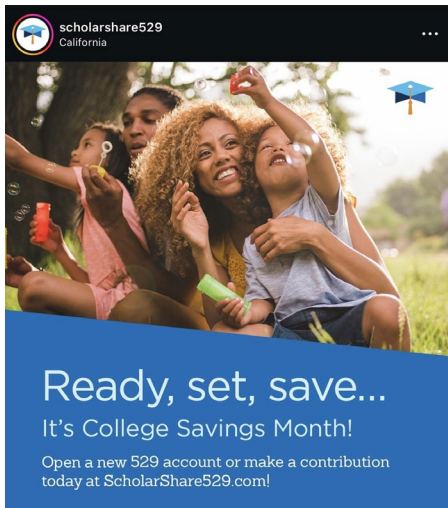
Transitioning to college life is a whole different vibe. Step into it confidently with ScholarShare 529's College Countdown. Find all the guidance, support, and tips you need at collegecountdown.scholarshare529.com!



College Countdown is a helpful tool for a smoother college transition.

ScholarShare529

ScholarShare 529 Social Media: Q3 Instagram Samples



ScholarShare 529 Social Media: Q3 LinkedIn Samples



ScholarShare 529
367 followers
3mo · 🌐

+ Follow ...

To all the grads and parents of grads out there, meet your new BFF: College Countdown, ScholarShare 529's very own college transition guide. Everything you need to know and conquer campus life this fall can be found here at [https://lnkd.in/e7mMxDAB!](https://lnkd.in/e7mMxDAB)



Meet your new BFF:
College Countdown



ScholarShare 529
367 followers
1mo · Edited · 🌐

+ Follow ...

What an honor to be named one of the Top of Class 529 plans! Save early for college now at ScholarShare529.com.



Saving For College
998 followers
1mo · Edited · 🌐

+ Follow

Today we are pleased to announce our 2024 529 Ratings with a completely revamped methodology designed to provide deeper insights and support informed decision-making for consumers, financial professionals, and plan providers.

This year, the Maryland College Investment Plan ranks as the top direct-sold 529 plan, with other standout states including Alaska, West Virginia, California, New Jersey, Georgia, and Kansas also earning the distinction of Top of the Class. 🏆

🔍 Key Updates for 2024:

- Separate ratings for direct-sold and advisor-sold plans
- New focus on ease of use and features that drive positive savings outcomes
- Award tiers including Top of the Class, High Honors, and Honors
- Introduction of a Resident Benefits score to highlight state-specific advantages

These changes reflect the evolving landscape of 529 plans, from traditional higher education savings to K12 private school funding and other new uses. Our enhanced ratings meet consumers where they are and shed a light on the country's best 529 plan options.

Explore the full 2024 529 Ratings here:

👉 <https://lnkd.in/gPxFfRK>

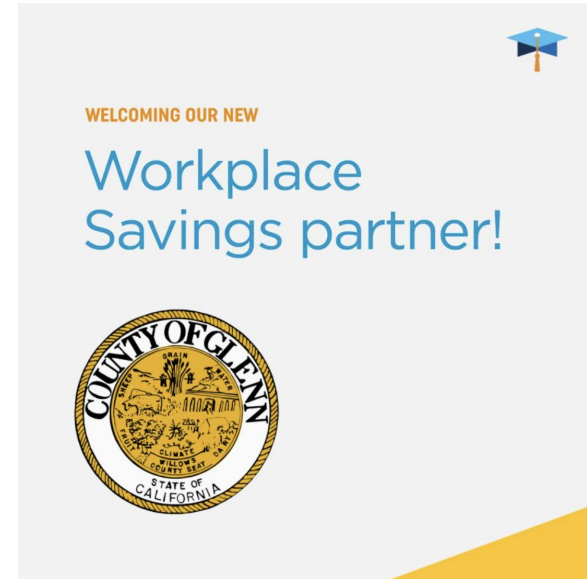
#529Plan #FinancialProfessionals #EducationSavings #529Ratings #SavingForCollege



ScholarShare 529
367 followers
3mo · 🌐

+ Follow ...

We're thrilled to announce **County of Glenn** has joined our Workplace Savings program family! Along with the growing list of counties, they are now assisting employees by providing options to save for college... all at zero cost. Find out how your company can do the same at ScholarShare529.com!



ScholarShare 529 Social Media: Q3 X and Threads Samples



ScholarShare 529 @ScholarShare529 · 9/23/24

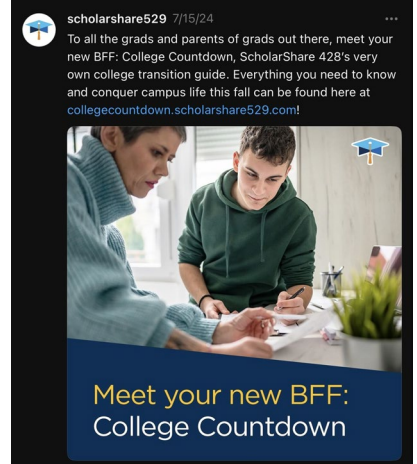
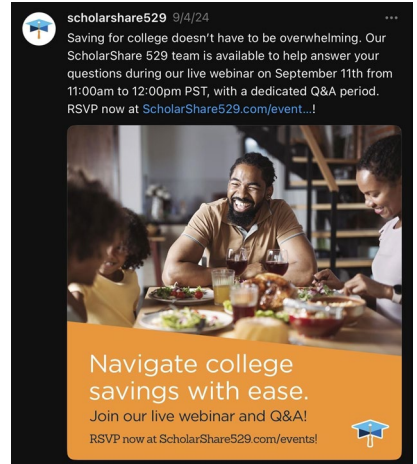
Plan ahead by looking into college savings options or by opening a 529 account now. Either way, ScholarShare 529 can help! Learn more and see how starting early can support your child's education savings by visiting ScholarShare529.com.

Why should you start your child's college savings right now?

College tuition has been increasing steadily, making savings even more crucial.

Waiting to start saving for college can cost you more in the long run.

Saving for college can help reduce the amount of student loans needed, even with scholarships and financial aid.



ScholarShare 529 – Mentions & Shares

Most active in supporting ScholarShare 529 in Q3 (based on mentions, shares, reposts):

- California State Treasurer’s Office and California State Treasurer, Fiona Ma
- Financial Literacy Advocates and non-profit and organizations
- College Countdown Contributors



Anna Peters • 2nd
Higher Education Consultant
4mo • Edited

I'm proud to share insights about affording higher education on the [ScholarShare 529](#) College Countdown website. Check it out and look for more to posts to come. ...more



4 College-Saving Tips from a Seasoned Pro - College Countdown
collegecountdown.scholarshare529.com

Patricia Roberts, J.D. • 2nd
Chief Operating Officer / Published Author & Keynote Speaker / Financial Edu...
3mo

While you'll always be their mom or dad, your ability to access information about and make healthcare, financial and other decisions for your child changes when they reach adulthood. ...more



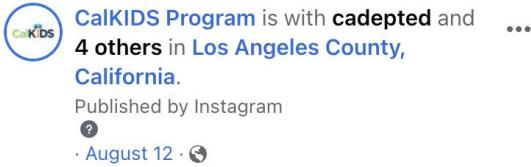
Documents that Provide Peace of Mind - College Countdown
collegecountdown.scholarshare529.com

CalKIDS Social Media: Mentions & Shares

CalKIDS has garnered mentions and shares from prominent sources, including Governor Gavin Newsom, the CA Governor's Office, Jennifer Newsom, the California State Treasurer's Office, state programs, community organizations, family resource groups, and various school districts and Offices of Education. Notable examples include End Poverty in California (EPIC), California EDD, County of LA Department of Social Services, and LA County Child Support Services.



CalKIDS Social Media: Q3 Facebook Samples



Make sure you have everything you need to check your child's eligibility and claim their free funded college savings account. Ready to go? Visit CalKIDS.org!



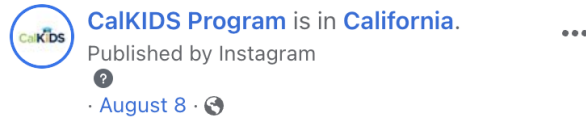
What do you

For Newborns

- Local Registration Number on child's birth certificate or CalKIDS Code on the letter you received
- Child's date of birth (allow 90 days after child's birth for information to be uploaded)
- County where child was born

For Students, Grades 1-12

- Statewide Student Identifier (SSID) or CalKIDS Code on the letter you received
- Student's date of birth
- County where student was enrolled



Got questions about CalKIDS? Our team has the answers! RSVP to our August 13th live online webinar at CalKIDS.org. We'll tell you more about the program, answer questions you may have, and take you through the process of checking your child's eligibility and claiming their CalKIDS account.

¿Tiene preguntas sobre CalKIDS? ¡Nuestro equipo tiene las respuestas! Confirme su asistencia a nuestro seminario web en vivo del 13 de agosto en CalKIDS.org. Le daremos más información ... See more

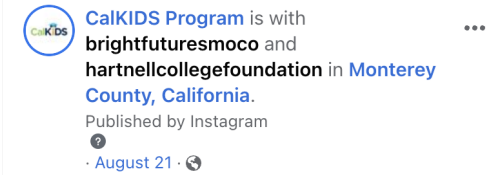


You've got questions, we've got answers!

RSVP to our live online webinar at CalKIDS.org

¡Tiene preguntas, tenemos respuestas!

¡Confirme su asistencia a nuestro seminario web en vivo en CalKIDS.org!



We're proud to recognize [@brightfuturesmoco](https://www.brightfuturesmoco.org) / [@hartnellcollegefoundation](https://www.hartnellcollegefoundation.org) this month for their outstanding collaboration with CalKIDS! Their unwavering commitment to advocating for early college planning has truly made a difference. With community backing and additional support, they've not only facilitated CalKIDS account claims but have also empowered families and fostered a positive shift in the perception of higher education.



Our mission is to support the children in our county and help them overcome the obstacles they face.

I am passionate about supporting the success of our families in our county. CalKIDS plays a pivotal role in shifting mindsets and providing the support that our families need.

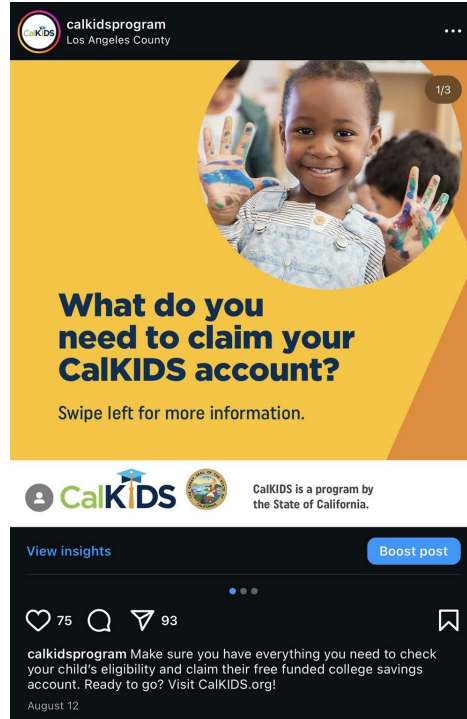
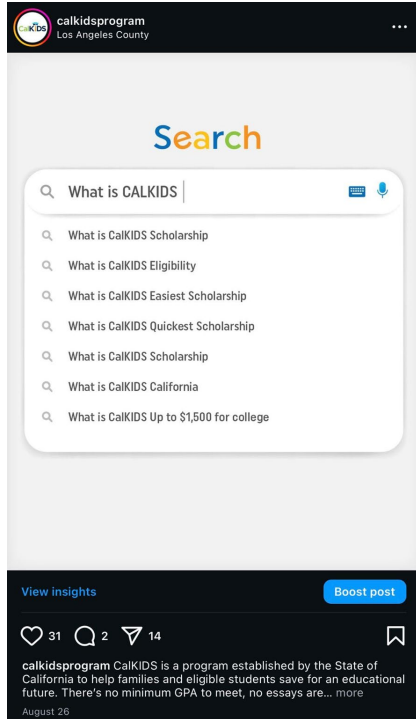
Feel fortunate to have the support of trusted community organizations and school districts throughout our county. We've partnered with our Family Resource Centers in Altam, Soledad, and Salinas to promote CalKIDS and raise awareness about its purpose.

CalKIDS PARTNER SPOTLIGHT

BRIGHT FUTURES

HARTNELL COLLEGE FOUNDATION

CalKIDS Social Media: Q3 Instagram Samples



CalKIDS Social Media: Q3 LinkedIn Samples

CalKIDS Program 429 followers 3mo • Edited •

Amazing news: 400K CalKIDS accounts have been claimed! Chances are you or your child has a CalKIDS account waiting to be claimed too... all California newborns and more than 60% of public-school students do! Don't miss out. Visit CalKIDS.org for eligibility and to claim an account today!

Office of California Governor Gavin Newsom
Gavin Newsom
California State Treasurer's Office
Fiona Ma
California Student Aid Commission
First 5 California
California Department of Education

CalKIDS is a program by the State of California.

CalKIDS Program 429 followers 4mo •

Through its Paid Family Leave program, California's **Employment Development Department** supports employees in being present for crucial life events. Thank you, EDD, for highlighting CalKIDS as an essential resource for families across California as we celebrate 20 years of Paid Family Leave!



CalKIDS Program 429 followers 2mo • Edited •

This is how you can get additional financial help for college or career training: Fill out your free FAFSA now, and make decisions later! By doing so, you can see how much free aid you could receive before committing to a degree or career certificate. The deadline for the financial aid application (CA Dream Act Application or FAFSA) is September 3 so apply now!

California Student Aid Commission
California Community Colleges

Attention: Community College Students

Apply Now Decide Later!

See how much free aid you can receive before committing to a degree or career certificate.

Fill out a free financial aid application (CA Dream Act Application or FAFSA) by the September 3rd deadline!

APPLY BY **Sep 3** DEADLINE

Find your next steps here! →

CSAC CALIFORNIA STUDENT AID COMMISSION Visit us for more information: CSAC.CA.GOV/HOW-APPLY

CalKIDS Social Media: Q3 X and Threads Samples

CA State Treasurer @CalTreasurer · 9/3/24
Celebrate #BackToSchool2024 by opening a @CalKidsProgram account today 💰 This is a unique and free opportunity to jumpstart or boost your child's savings for college or career training! To get started, go to calkids.org!


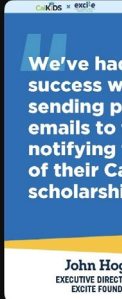
California Governor @CAGovernor · 9/3/24
Millions of California kids are eligible to claim their @CalKIDSProgram college or career savings accounts, but only a few hundred thousand have done so.

Begin your child's savings journey now → Calkids.org



as college savings accounts. These seed accounts are available

calkidsprogram 7/29/24
This month, we're thrilled to spotlight @excitecu and @excitefoundation for their remarkable collaboration with CalKIDS! Thank you, Excite, for driving college savings and financial education, and for championing economic mobility for future generations. Your efforts in helping California's children claim their CalKIDS accounts are truly inspiring.

John Hog
EXECUTIVE DIRECTOR
EXCITE FOUNDATION

CalKIDS Program @CalkidsProgram · 7/22/24
CalKIDS has helped encourage families with newborns to begin a new savings habit. 🎓💰 Since CalKIDS launched in 2022, the number of ScholarShare 529 accounts opened by families with newborns has grown year over year!



Fiscal Year	Number of Accounts
2018-2019	7,069
2019-2020	7,474
2020-2021	8,591
2021-2022	8,591
2022-2023	15,078
2023-2024	17,321

Number of ScholarShare 529 accounts opened for children under the age of one during each fiscal year

You reposted

CA Department of Education @CADept... · 8/29/24
#DidYouKnow @CalkidsProgram offers eligible low-income public-school students initial funds to help build college savings? —Get up to \$1,500 for college!

Visit calkids.org or call 888-445-2377 for more information about the program.



California started a free college savings account for your child.

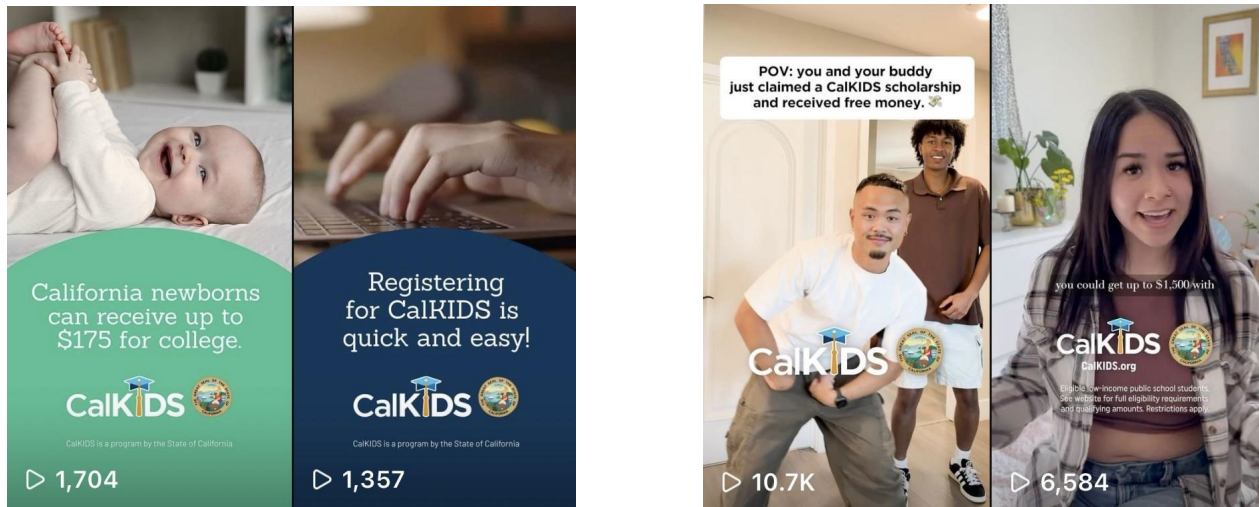
Claim it now!

CalKIDS is a program by the State of California

CalKIDS Social Media: Sentiment & Observations

Creative Refresh Impact

- The CalKIDS creative refresh during Q3 boosted metrics, including increased shares, likes, and mentions. By aligning content with relevant and trending topics as well as with the content delivery, we were able to meet the audience where they are, creating a stronger connection and driving more engagement.
- This strategic approach helped amplify the reach and impact of CalKIDS, fostering greater awareness and support for the program.

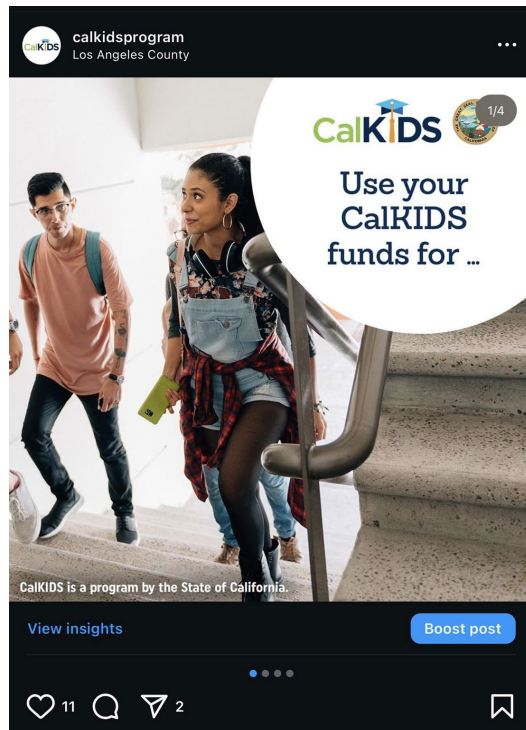


BEFORE (Left) and CURRENT (Right)
More views/plays and shares.

CalKIDS Social Media: Sentiment & Observations

Creative Refresh Impact (Continued)

- Speaking to our audience in a more casual tone and using emojis in the creative has made the content feel more relatable, leading to a noticeable increase in metrics compared to similar content from before.



BEFORE (Left) and CURRENT (Right)
More likes and shares.

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2025 Marketing Plan

December 16, 2024

Five Factors Impacting Our Growth in 2025 and Beyond

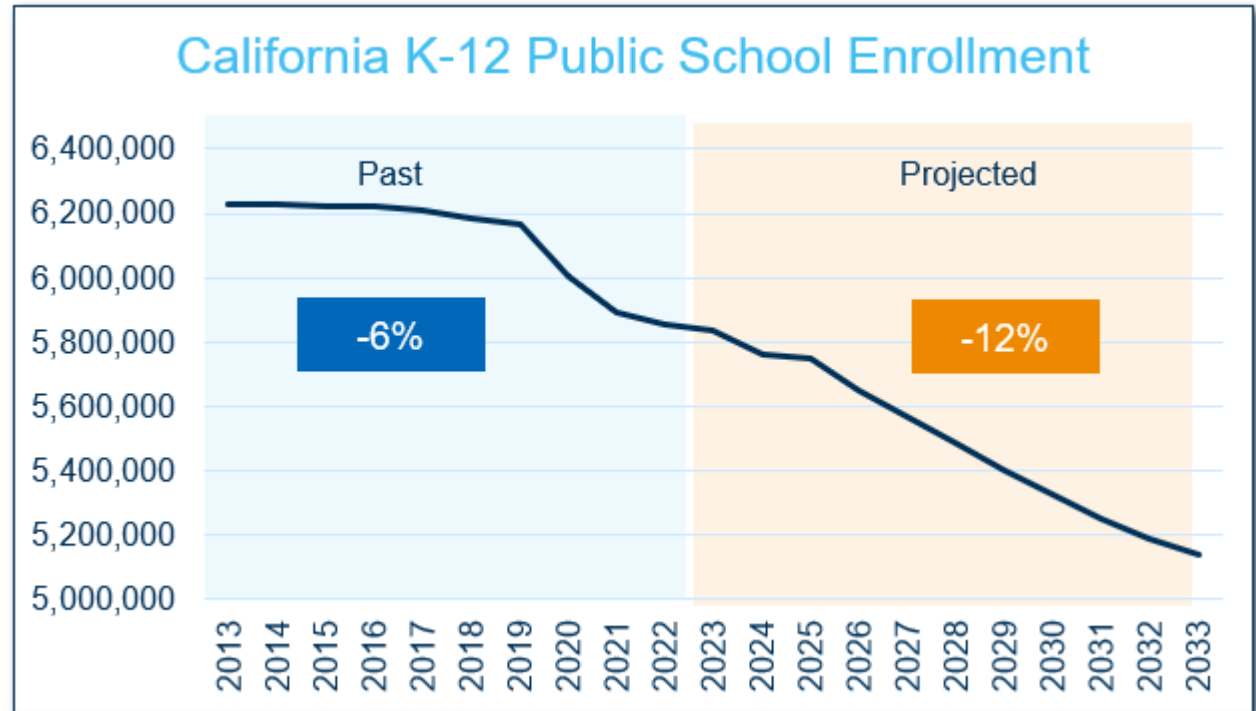
- 1** A Contracting Target Audience
- 2** Increasing Doubts About College
- 3** Slowing Category Growth
- 4** Competition
- 5** Increasing Diversity



Five Factors Impacting Our Growth in 2025 and Beyond

1 A Contracting Target Audience

- California's college enrollment is projected to be stable+ through 2035.
- Our marketing target is 10-15 years younger* and contracting. Birth rates are near long-term lows, K-12 enrollment declining.

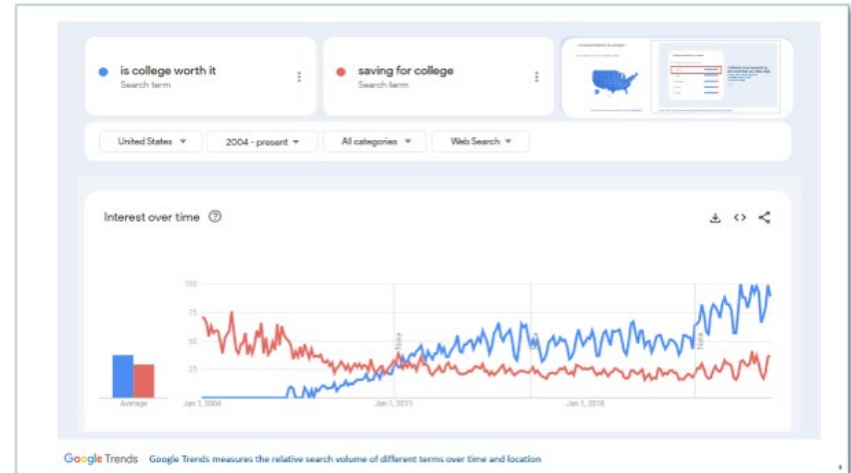


*60% of our new beneficiaries are 5yo or under. 76% are under 10yo.

Five Factors Impacting Our Growth in 2025 and Beyond

2 Increasing Doubts About College

- Media reports – We’ve moved from an era of unquestioning college aspiration to skepticism.
- Google traffic – Growing concern over the cost-benefit of college, especially in California.
- Yet higher ed remains tied to higher lifetime income. And our target market knows it.

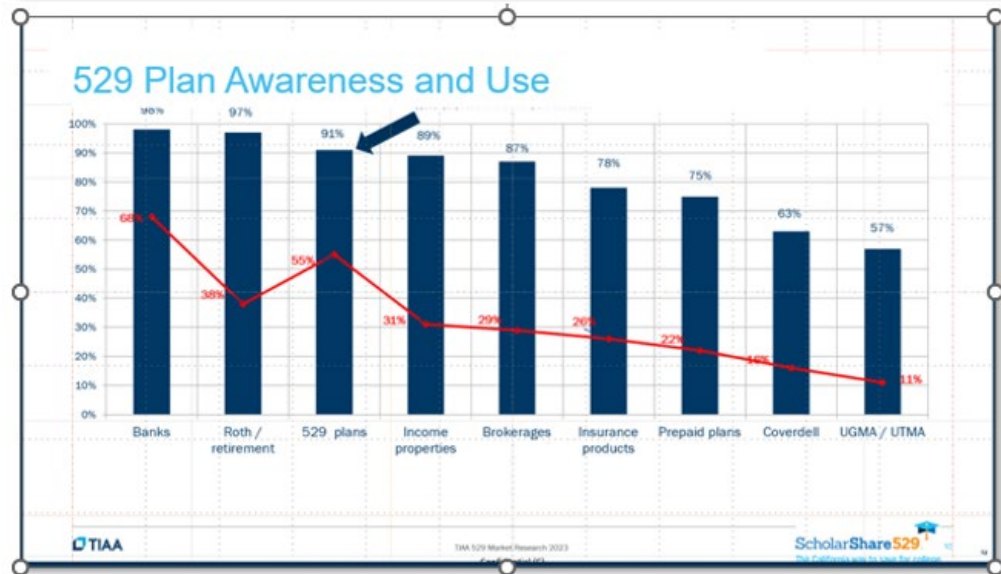


Five Factors Impacting Our Growth in 2025 and Beyond

3

Slowing Category Growth

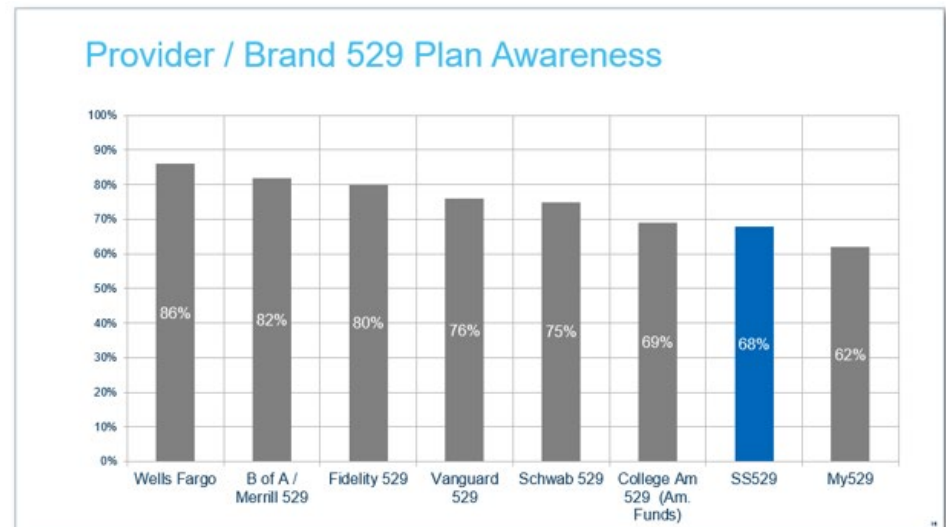
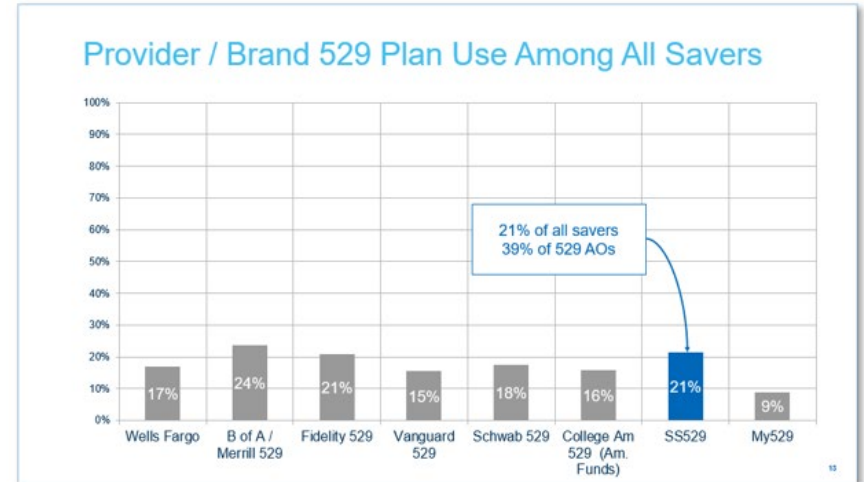
- 529 Plans are now a 25-year-old product category.
- Past the era of easy growth.
- Some secondary generation product use.
- Limited remaining room to grow via increased awareness (91% awareness among savers / intended savers).



Five Factors Impacting Our Growth in 2025 and Beyond

4 Competition

- The California 529 category is very fragmented.
- Our market share is solid - we control about 1/5 of the accounts.
- The lack of an exclusive tax deduction has a major impact on our share of market.
- We are competing against household names that have pre-existing relationships with our target audience and can use owned media to target them.

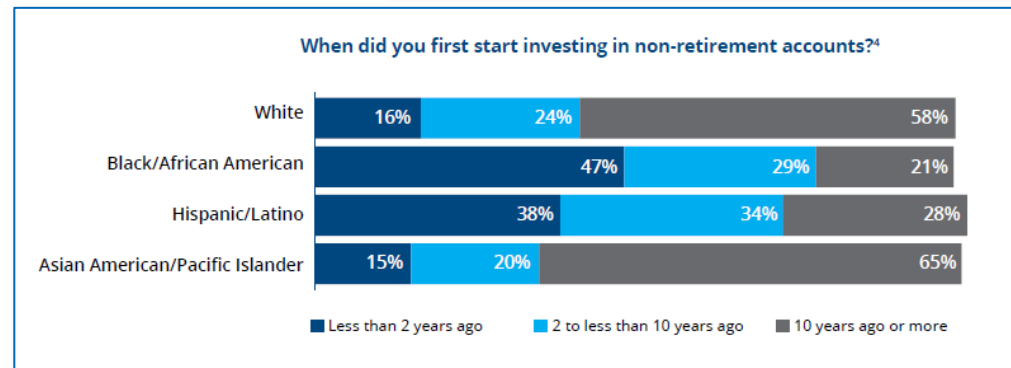
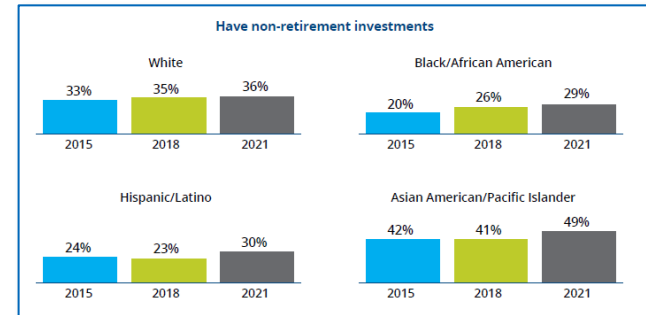
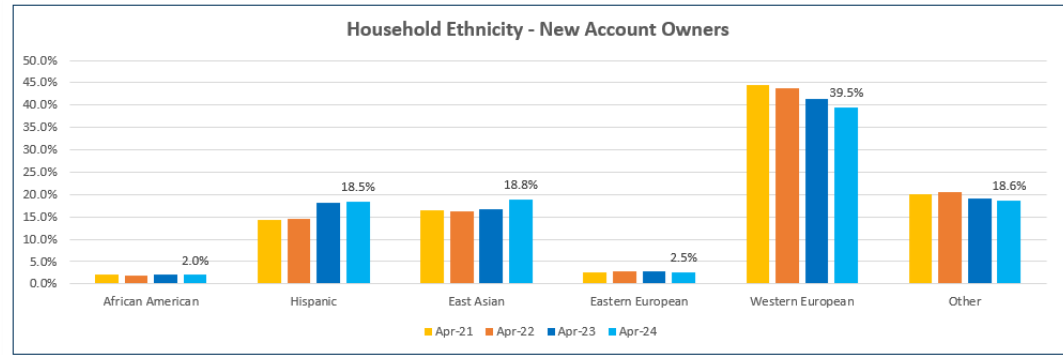


Five Factors Impacting Our Growth in 2025 and Beyond



Increasing Diversity

- We are making progress towards improved racial, ethnic, and economic diversity.
- Our progress is in line with broader trends.



Consumer Mindsets

Economically Challenged



If

I don't know if...

We will be able to afford college

I can afford to save

I can save enough to make a difference

I should encourage too strongly

Anxious Middle



How

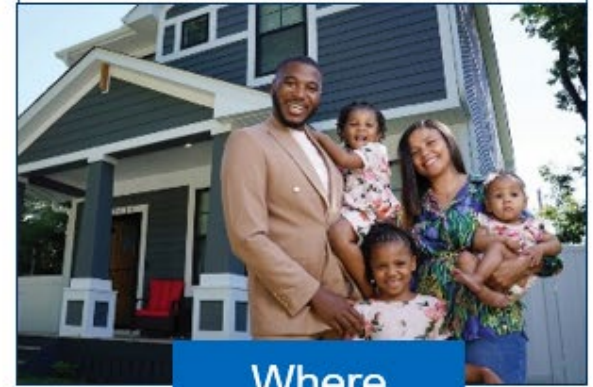
I know we will make it happen, but I am not sure how...

We will pay for it

We can save enough

We can make the most out of our savings

Core Savers



Where

We will fund their education but need to determine where...

To invest these assets.
Maxed out my 401(k) and like the tax advantages of a 529

To open the account.
Current provider keeps telling me about their 529 plan

What's New for 2025

- **Continue to...**
 - Leverage data/digital media to achieve Accounts/ Contributions performance targets
 - Allocate resources to increase diversity of account owner base
 - Support tenured Account Owner base through College Countdown experience
- **Increase...**
 - Our Q1 ad spending and insistence in our messaging
 - Actions to cross-sell ScholarShare to CalKIDS audience
- **Build...**
 - A messaging platform for Cassandra that brings ScholarShare and CalKIDS into broader conversations around the value of college, college access, how families can leverage financial resources available from other parties/programs. Audiences to include California families/prospects, 529 Industry, College Access community.
- **Mature our approach to...**
 - Intermediary marketing by doubling down on Workplace Savings Program employer segment and redirecting time/resources previously allocated to RIA/Advisor segment (until there is a tax deduction)
 - Public Relations by shrinking traditional PR tactics (and retiring our relationship with Proσιο Communications) and reallocating time/resources to Social Media



2025 ScholarShare 529 Marketing Plan

The 2025 plan focuses on five central goals:

	Goal	Strategy	Tactics
1	Gain New Accounts/AUM	<p>Strategically use technology and marketing resources to grow the plan.</p> <p>Marketing Performance Targets:</p> <ul style="list-style-type: none"> • 6% growth in Total Accounts • 4% growth in Contributions • <2% of Total Accounts closed due to rollovers 	<ul style="list-style-type: none"> • Document and refine user journey to better engage prospects and Account Owners. • Enrich advertising channels with new media. • Evolve social media approach to drive more business. • Continue use of seasonal campaigns and evergreen marketing. Increase ad spend and insistence in messaging in Q1. Consider “Open Enrollment” themed campaign to replace fall College Savings Month promotion. • Build a messaging platform for Cassandra that brings ScholarShare and CalKIDS into broader conversations.
2	Increase Account Owner Diversity	Leverage targeted media and PR/media relations to increase the diversity of ScholarShare 529 account owners.	<ul style="list-style-type: none"> • Continue to use targeted paid media to engage more diverse prospects. • Establish a Spanish-speaking spokesperson for Spanish language media.
3	Cross-sell younger CalKIDS claimants on ScholarShare	Engage CalKIDS claimants with content to spur ScholarShare account openings	<ul style="list-style-type: none"> • Develop engagement tests using owned and potentially paid channels.
4	Grow plan via Employers/RIAs	Continue to build relationships with employers (public and private) and registered investment advisors to attract new account owners.	<ul style="list-style-type: none"> • Support TFI education consultants and SIB field team in gaining new partnerships. • Enrich employer onboarding process. • Activate employees of partner organizations.
5	Support tenured account owners	Continue to enhance the College Countdown program to serve the needs of mature account owners on the cusp of using their 529 savings.	<ul style="list-style-type: none"> • Continue to leverage Patricia Roberts as site host. • Enrich content on the evolution of higher ed and career training and develop more resources for underserved audiences.

1 Gain News Accounts/AUM

Strategy: Strategically use technology and marketing resources to grow the plan. Performance targets for 2025 to be determined in early January based on approved formulas.

	Tactics/Deliverables	Timing	Measures of Success
A.	Leverage data analytics and modeling techniques to create target audience pools	All Year	<ul style="list-style-type: none"> • Cost Per New Account
B.	Use paid media, owned media, public relations, and Social Media to strengthen ScholarShare 529's brand identity and promote compelling offers to Prospects, Inquirers, and Account Owners	All Year	<ul style="list-style-type: none"> • Completion of 4 Seasonal Campaigns (Q1 Campaign, 529 Day, College Savings Month/Open Enrollment, Holiday) • Ongoing digital advertising program • New Accounts/Contributions • Ugift usage
C.	Build a messaging platform for Cassandra that brings ScholarShare and CalKIDS into broader conversations	All Year – Plan creation in Q1; progressive roll-out	<ul style="list-style-type: none"> • Media appropriate volume measures • Professional network growth • Cassandra's satisfaction

Increase Account Owner Diversity

Strategy: Leverage targeted paid media, social media, and PR/media relations to increase the diversity of ScholarShare 529 account owners.

	Tactics/Deliverables	Timing	Measures of Success
A.	Dedicate portion of paid media budget to engaging more diverse families	All Year	<ul style="list-style-type: none"> • Media coverage • Demographics reporting
B.	Establish a Spanish-speaking spokesperson for Spanish language media and build library of infographics and other media-friendly presentations	Q2 Start	<ul style="list-style-type: none"> • Media coverage • Interviews • Social media metrics (Likes, shares, etc.)

Cross-sell younger CalKIDS claimants on ScholarShare

Strategy: Leverage owned, and potentially paid channels, to increase penetration of ScholarShare accounts in CalKIDS households

	Tactics/Deliverables	Timing	Measures of Success
A.	Evaluate owned channels to carry ScholarShare messaging and develop content, templates, etc. to round out the CalKIDS account owner experience	Q2 Start	<ul style="list-style-type: none"> • Cross-Sell rate • Balances in ScholarShare accounts held by CalKIDS families
B.	Evaluate the need for Spanish language stable of communications assets need for cross-selling	Q2 Start	<ul style="list-style-type: none"> • Completion of evaluation and action on recommendations made

4 Grow plan via Employers/RIAs

Strategy: To attract new Account Owners, focus time and resources on building WPS relationships (public and private) and dedicate limited time on registered investment advisors.

	Tactics/Deliverables	Timing	Measures of Success
A.	Arm TIAA Field Consultants and SIB Staff with tools and materials to engage prospective employer partners	All Year	<ul style="list-style-type: none"> # of new Workplace Savings Program (WPS) employer partnerships
B.	Promote employee utilization via various engagement techniques and feature seasonal offers and CaKIDS as appropriate	All Year	<ul style="list-style-type: none"> Employer usage of employee materials # of employee consultations
C.	Enhance sales training, goal setting, and resource management for increased impact	All Year	<ul style="list-style-type: none"> WPS sign-ups Assets Under Management

5 Support tenured account owners

Strategy: Continue to enhance the College Countdown program to serve the needs of tenured account owners on the cusp of using their 529 savings.

	Tactics/Deliverables	Timing	Measures of Success
A.	Renew Patricia Roberts as site host and leverage her network to gain attention for the College Countdown program	Ongoing	<ul style="list-style-type: none"> • Social Media mentions • Site visits
B.	Enrich content on the evolution of higher ed and career training and develop more resources for underserved audiences.	Ongoing	<ul style="list-style-type: none"> • Amount of content published • Increased bench of contributors • Partnerships with complementary organizations

Proposed 2025 ScholarShare 529 Marketing Budget

	GOAL	TACTICS	BUDGET	SUBTOTAL	%
1	Gain New Accounts/AUM	Acquisition Advertising to Prospects, Inquirers, Account Owners	\$ 6,025,000	\$ 7,950,000	80%
		Advertising on Streaming Media	\$ 1,000,000		
		Incentives (529 Day 2024 (\$100,000) + Holiday 2024 (\$90,000) + Open Enrollment/CSM 2025 (\$250,000)	\$ 440,000		
		Social Media	\$ 300,000		
		Fulfillment, Printing, Postage	\$ 100,000		
		Research	\$ 50,000		
		Acquisiton Video Creative for Streaming Platforms	\$ 35,000		
2	Increase Diversity	Paid Media & Spanish PR Support	\$ 450,000	\$ 450,000	5%
3	Cross-sell to CalKIDS	Content Marketing	\$ 100,000	\$ 100,000	1%
4	Employers	Gain new WPS Employers & Engage Employees	\$ 100,000	\$ 200,000	2%
		Sales Training/Management	\$ 100,000		
5	College Countdown	Promote and enhance site and program	\$ 100,000	\$ 100,000	1%
6	Support Resources	Website Support & Marketing Agency/Contractors	\$ 1,200,000	\$ 1,200,000	12%
	TOTAL		\$ 10,000,000	\$ 10,000,000	100%



California Kids Investment and Development Savings Program

Q3/2024 Paid Campaign Performance

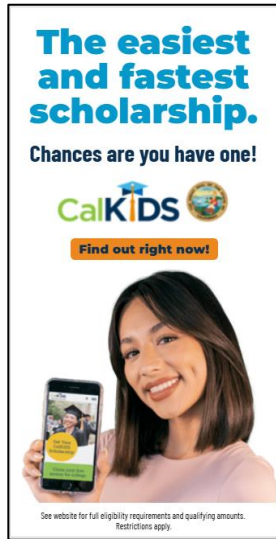
December 16th, 2024

Back-to-School Campaign Summary

Strategy:	<p>Increase CalKIDS brand awareness as a “scholarship”, program engagement, and claims among high school students and early-college students. In addition, build program recognition and trust among audiences who play an influential role in students lives.</p> <ul style="list-style-type: none">• Apply learnings from the High School Seniors campaign.• Use a combination of digital platforms that resonate with students’ interest, lifestyle, and college journey.• Use advanced data targeting to reach the niche influencer target audiences and minimize wastage.• To maximize reach amongst high schools with high eligibility counts, we will include additional layers of activity specifically targeting those High Schools and those zip codes.										
Target Audiences:	<p>High School Students & Seniors and early-college students Parents of high school seniors and college freshmen Academic counselors and education administrators</p>										
Timing:	<p>August 19th through October 13th, 2024 (8 weeks)</p>										
Media:	<table><tr><td>Audio Streaming</td><td>Spotify</td></tr><tr><td>Display Banners</td><td>Retargeting (website visitors, ad clickers, & video ad watchers), Niche</td></tr><tr><td>Video</td><td>Pre-Roll, In-Content, Connected TV (CTV), OTT, Apps, Web</td></tr><tr><td>Social Media</td><td>Instagram, Facebook, TikTok</td></tr><tr><td>Search</td><td>Google Performance Max</td></tr></table>	Audio Streaming	Spotify	Display Banners	Retargeting (website visitors, ad clickers, & video ad watchers), Niche	Video	Pre-Roll, In-Content, Connected TV (CTV), OTT, Apps, Web	Social Media	Instagram, Facebook, TikTok	Search	Google Performance Max
Audio Streaming	Spotify										
Display Banners	Retargeting (website visitors, ad clickers, & video ad watchers), Niche										
Video	Pre-Roll, In-Content, Connected TV (CTV), OTT, Apps, Web										
Social Media	Instagram, Facebook, TikTok										
Search	Google Performance Max										

Five Campaign Creative Concepts

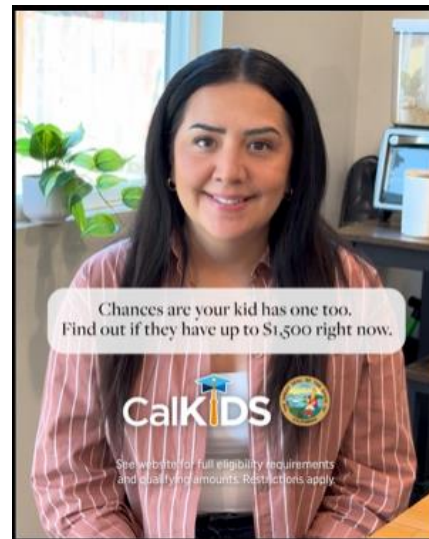
“Easiest & Fastest”
“Tee He He”
“Talking Head”
“Generation Gap”



“Scholarship”
Students
Parents/Family
Counselors/Education



“Tee He He”
Students



“Talking Head Mom”
Parents/Family

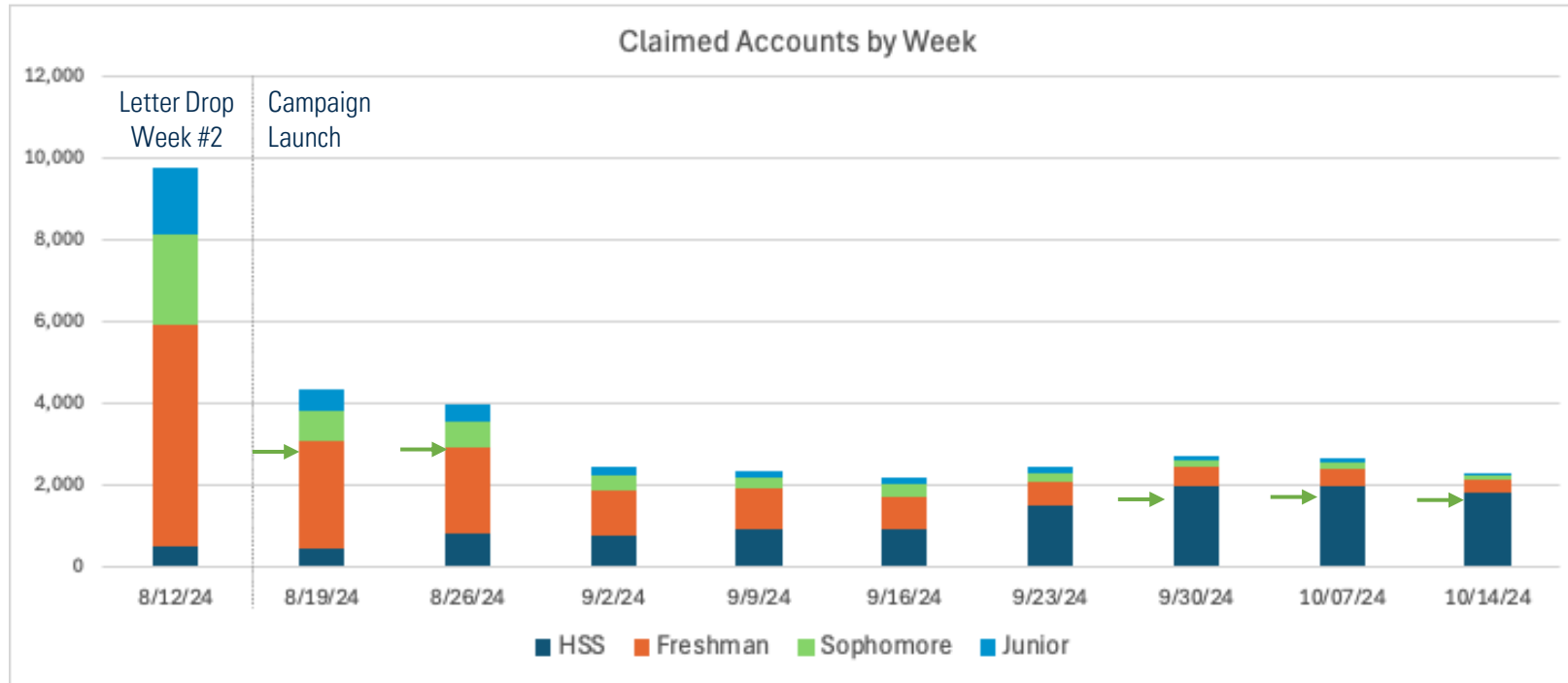


“Talking Head Student”
Students
Parents/Family



“Gen Z vs. Millennial”
Students

13% Increase in Student Claims During Paid Media Campaign



- College Freshman claims peaked at the start of the campaign whereas High School senior claims rose at the end.
- The isolated letter drop period (7/12 & 7/28) yielded about the same number of new claims as the entire paid media campaign (45k and 46k respectively).

Campaign Increased Overall CalKIDS.org Website Metrics

CalKIDS.org/Scholarship Landing Page Metrics

8/19/2024 – 10/13/2024



- A new landing page was setup specifically for this campaign.
- While the user engagement time is low, we attribute this to the very specific objective of checking eligibility with their SSID.

CalKIDS.org Landing Page Metrics

8/19 to 10/13 compared to the previous 8 weeks (6/24 – 8/18)



- The previous period does not include any paid media only mailers.

Users: Total number of active users (people who engaged with the site).

New Users: Number of people who have never visited the site before.

Sessions: The number of sessions that began on the site.

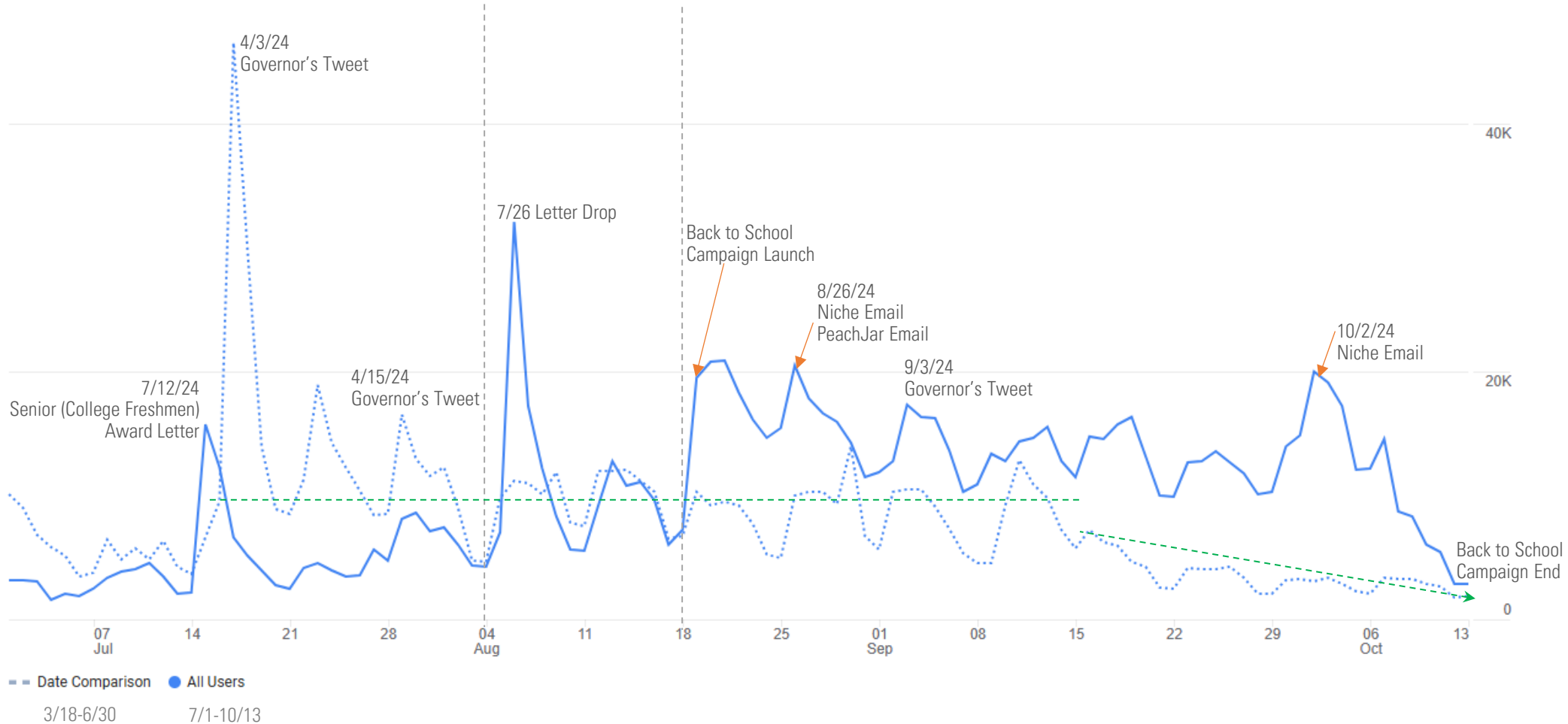
Views: The number of web pages users saw. Repeated views of single page is counted.



Website Visitor Increases Held For The Entire Campaign

CalKIDS.org Landing Page Visits by Day

7/1 to 10/13 (compared to 3/18/24-6/30/24)



TikTok Delivered The Most Traffic To The Landing Page

CalKIDS.org/Scholarship Landing Page Traffic Source

8/19 to 10/13

Session source / medium	Users	Sessions
	330,954	389,669
1 Social: TikTok	→ 80,483	83,658
2 GDS Digital: Video	63,990	91,354
→ 3 Social: Facebook Feed	50,148	55,893
→ 4 Social: Instagram Stories	37,234	39,887
→ 5 Social: Instagram Feed	35,580	37,548
6 GDS Digital: Display Banner	19,798	21,383
7 Social: Facebook Stories	18,784	21,780
8 Google: Pmax	8,559	10,340
9 Niche: Scholarship Portal	8,116	9,440
10 Spotify: Audio	5,874	6,356
11 GDS: Digital: Native Ads	2,361	2,550
12 Referral	2,131	2,537
13 Direct	1,645	2,203
14 Niche: Email	1,461	1,829
15 Organic Search	545	692
16 Not Set	386	435

- Social media proved effective as a referral source.
- TikTok's performance is significant as their budget was 27% of the Programmatic Video spend.
- Instagram and Facebook generated almost the same traffic at 72,814 and 68,932 users, respectively. Closely followed by programmatic video at 63,990 visitors.
- To deliver an accurate understanding of ad performance CalKIDS needs to place pixels on the Outcome Tracker.

Social Media Proved Effective As A Referral Source

CalKIDS.org Referral Session Source

8/19 to 10/13

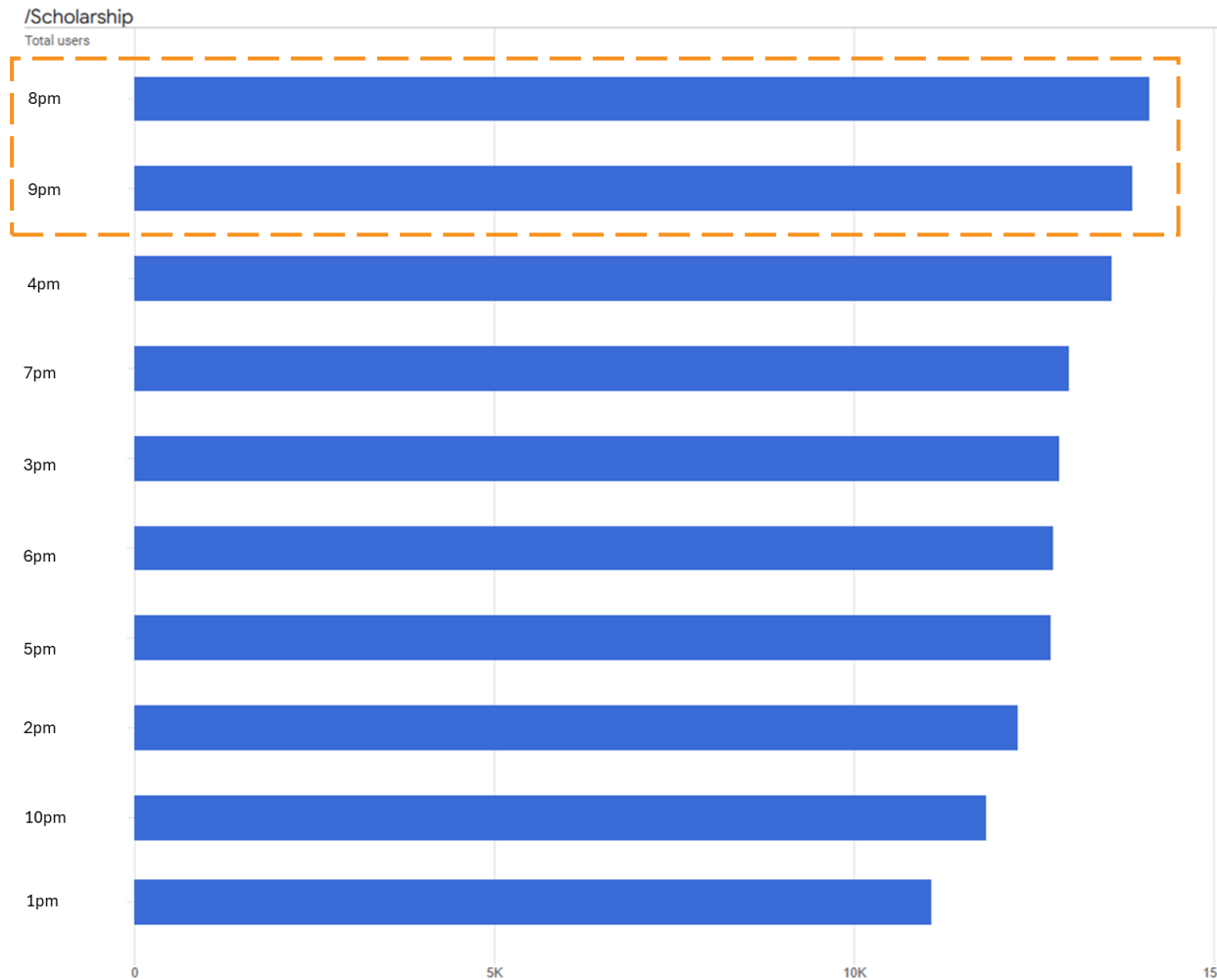
Referral Source	Users
1 qr1.be / referral	104,431
2 calkids.org / referral	49,203
3 l.instagram.com / referral	30,338
4 calkids. outcometracker.app / referral	5,634
5 m.facebook.com / referral	2,234
6 qweb.clovisusd.k12.ca.us / referral	4,349
7 reddit.com / referral	1,509
8 scholarshare529.com / referral	981
9 gov.ca.gov / referral	793
10 classroom.google.com / referral	629
11 lm.facebook.com / referral	659
12 mail.google.com / referral	844
13 treasurer.ca.gov / referral	423
14 fUSD.net / referral	278
15 my.peachjar.com / referral	597
16 comm.sjsu.edu / referral	523
17 l.facebook.com / referral	314
18 out.smores.com / referral	366
19 cascholarshare529.com / referral	403
20 parentsquare.com / referral	156
	278

- Social media remains an effective referral tactic driving website traffic.
- The “outcome tracker” referrals decreased from 11,101 in Q2/24 to 2,234 in Q3/24.

Website Visits Were More Likely To Be In The Evening

CalKIDS.org/Scholarship Landing Page – Visitors by Hour

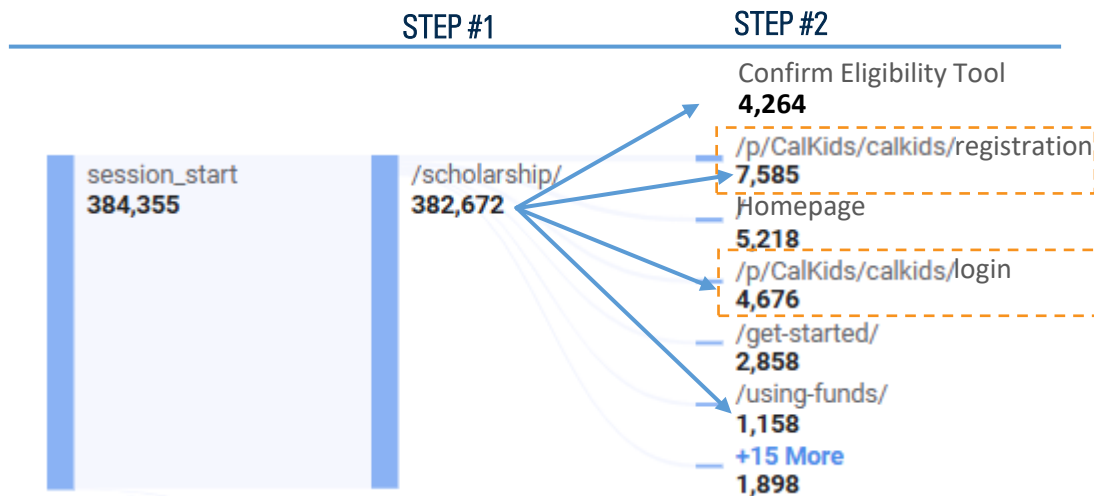
8/19 to 10/13



Visitors More Likely To Visit Main Registration Page After Landing

CalKIDS.org/Scholarship Landing Page – Visitor Behavior

8/19 to 10/13



- After clicking on an ad users are taken to the Scholarship landing page which then allows us to track their behavior on the website.

Digital Campaign Delivery – 8 Weeks

Key Paid Media Metrics

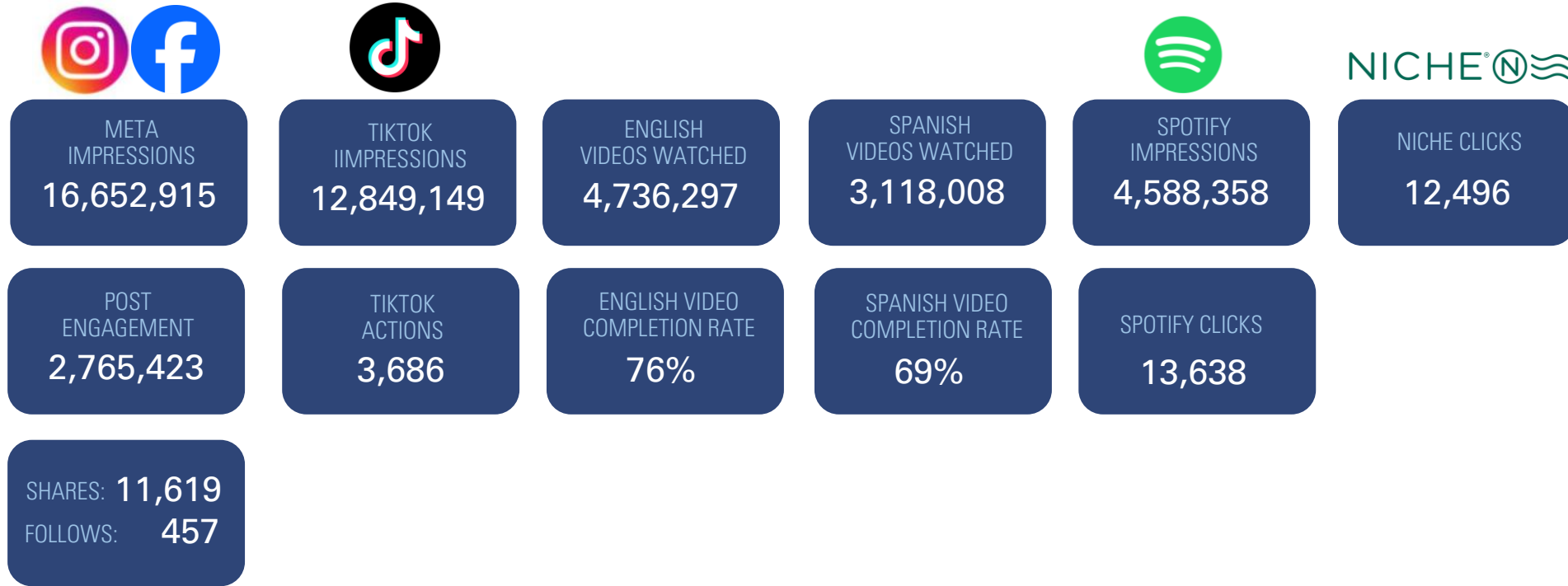


Desired Action Taken

Confirm Eligibility/See if You Qualify: 19,213
Claim Account/Get Your Money: 23,127

*Actions include "Confirm Eligibility" & "Claim Account" from any page on the CalKIDS website
"See if you Qualify" & "Get Your Money" actions since 9/26 only due to incorrect pixel placement

Digital Campaign Delivery by Platform



- English videos recorded 34% more videos watched (100% of the way through) however, their budget was \$27,600 more.

Performance by Audience

Audience	Impressions	Clicks	CTR	Spend	Completion Rate	CPC	CPM	Action*	CPA
HS & Early College Students	36,074,425	398,913	1.03%	\$405,494	76.1%	\$0.99	\$10.20	38,827	\$10.44
Counselors/Educators	4,766,022	43,643	0.92%	\$40,000	-	\$0.91	\$8.38	2,867	\$13.95
Parents/Family	20,306,175	172,345	0.85%	\$198,333	67.8%	\$1.12	\$9.49	10,751	\$18.45
TOTAL	61,146,622	614,901	0.96%	\$643,827	72.7%	\$1.02	\$9.82	52,445	\$12.28

8/19/2024 – 10/13/2024

- As expected, students recorded the highest number of actions at the lowest CPA. Activity targeting the influencer audiences supported students as an awareness tactic thus generating less actions.
- Interestingly, most of the reported actions across all audiences were 'view-throughs,' meaning users saw the ad but did not click on it immediately. Instead, they returned to the CalKIDS website later to claim their account or check their eligibility.

Platform & Tactic Performance - Students

High School Students & Early College

High School & Early College Students	Impressions	Clicks	CTR	Spend	Completion Rate	CPC	CPM	CPCV	Action*	CPA
Programmatic Video	7,264,658	82,676	1.14%	\$141,778.00	76.1%	\$1.71	\$19.52	\$0.03	1,547	\$91.65
Instagram	9,071,620	101,457	1.12%	\$103,147.77	6.3%	\$1.02	\$11.37	\$0.23	19,917	\$5.18
TikTok	12,849,149	103,298	0.80%	\$55,136.00	1.1%	\$0.53	\$4.29	\$0.41	3,686	\$14.96
Programmatic Audio - Spotify	4,588,358	13,638	0.30%	\$35,444.00	-	\$2.60	\$7.72	-	-	-
Facebook	2,072,875	67,558	3.26%	\$34,691.23	6.6%	\$0.51	\$16.74	\$0.45	7,258	\$4.78
Google: Performance Max	146,185	17,790	12.17%	\$11,667.00	-	\$0.66	\$79.81	-	6,419	\$1.82
Niche Display & Email (8/26 & 10/2)	81580	12,496	15.32%	\$23,630.00	-	\$1.89	289.654	-	-	-
Sub Total	36,074,425	398,913	1.11%	\$405,494.00	20.7%	\$1.02	\$11.24	\$0.07	32,408	\$12.51

* Action includes: check eligibility/see if you qualify & claim accounts/get your money
8/19/2024 – 10/13/2024

- Due to programmatic actions not being counted for the majority of the campaign, the campaign **CPA was \$12.51** which is slightly higher than the HS Seniors campaign at \$10.06
- **Facebook** delivered the lowest cost per action (CPA) of **\$4.78** followed closely by Instagram at \$5.18.
- TikTok was unable to optimize against custom events (claims) thus focused on driving website visits.
- While only running for the last 3 weeks of the campaign, Google search was extremely effective across all KPIs particularly actions. We recommend increasing this budget in the next campaign.
- Predictive Audiences (finding users who visit, and search websites related to scholarships and FAFSA), are the top drivers of programmatic video actions for both English and Spanish language.

Performance - Counselors and Educators

Counselors/Educators

8/19/2024 – 10/13/2024

Platform/Tactic	Impressions	Clicks	CTR	Spend	Completion Rate	CPC	CPM	Action*	CPA
Meta (Instagram/Facebook)	2,107,872	41,316	1.96%	\$20,000	-	\$0.48	\$9.49	2,564	\$7.80
Programmatic Display Banners	2,658,150	2,327	0.09%	\$20,000	-	\$8.59	\$7.52	303	\$66.01
Sub Total	4,766,022	43,643	0.92%	\$40,000	-	\$0.92	\$8.39	2,867	\$13.95

Parents/Family

Platform/Tactic	Impressions	Clicks	CTR	Spend	Completion Rate	CPC	CPM	Action*	CPA
Meta (Instagram/Facebook)	3,400,548	71,401	2.10%	\$25,000	5.0%	\$0.35	\$7.35	6,829	\$3.66
Programmatic Display Banners	12,365,348	12,293	0.10%	\$84,500	-	\$6.87	\$6.83	1,686	\$50.12
Programmatic Video	4,540,279	88,651	1.95%	\$88,833	67.8%	\$1.00	\$19.57	2,236	\$39.73
Sub Total	20,306,175	172,345	0.85%	\$198,333	53.4%	\$1.15	\$9.77	10,751	\$18.45

- Programmatic video and display figures are not reflective of their effectiveness as actions were not recorded for the majority of the campaign.
- Counselor and Educator Influencer activity served as an awareness tactic.

Performance by Language - Students

Language	Impressions	Clicks	CTR	Spend	Completion Rate	CPC	CPM	Action*	Action*
Spanish	12,676,684	102,937	0.81%	\$138,490	18.9%	\$1.35	\$10.92	3,398	\$16.09
English	23,169,976	265,690	1.15%	\$231,707	23.7%	\$0.87	\$10.00	27,464	\$5.04

- While it appears reaching the in-language Spanish audience comes at a cost premium this is not a true comparison as a large percentage (69%) of the Spanish tactics used were unable to be tracked i.e., Spotify

Top Ad Units Ranked by KPI

CTR	CPC	CPM	CPCV	CPA
<u>Generation Gap EN (FB)</u>	Image Ad EN (Tik Tok)	<u>Teehehe F/M EN (TT)</u>	<u>Teehehe F/M EN (PV)</u>	Image Ad EN (FB)
<u>Teehehe F/M EN (FB)</u>	<u>Teehehe F/M EN (FB)</u>	<u>Teehehe M EN (TT)</u>	<u>Generation Gap EN (PV)</u>	<u>Teehehe F/M EN (FB)</u>
Talking Head SP (FB)	<u>Teehehe F/M EN (TT)</u>	Image Ad EN (Tik Tok)	<u>Teehehe M SP (PV)</u>	Image Ad EN (IG)
Image Ad EN (Tik Tok)	<u>Generation Gap EN (FB)</u>	Talking Head SP (PV)	Talking Head SP (PV)	<u>Teehehe F/M EN (IG)</u>
<u>Teehehe M SP (FB)</u>	<u>Generation Gap EN (TT)</u>	Generation Gap EN (TT)	<u>Generation Gap EN (PV)</u>	<u>Generation Gap EN (FB)</u>

Spanish Only

CTR	CPC	CPM	CPCV	CPA
Talking Head SP (FB)	<u>Teehehe M SP (TT)</u>	<u>Teehehe M SP (TT)</u>	<u>Teehehe M SP (PV)</u>	<u>Teehehe M SP (IG)</u>
<u>Teehehe M SP (FB)</u>	Talking Head SP (FB)	Talking Head SP (TT)	Talking Head Prep SP (PV)	Talking Head SP (FB)
<u>Teehehe M SP (PV)</u>	<u>Teehehe M SP (FB)</u>	Banner A SP (ST)	<u>Teehehe M SP (FB)</u>	<u>Teehehe M SP (FB)</u>

- Overall, "teehehe" appears to be the most engaging creative ad unit and lowest CPC while the "image" ads drive the most cost-effective actions.
- The Male "tee hee" Instagram ad generated the most actions amongst the Spanish language audience.

Summary

- Ultimately success is measured by outcome tracker claim increases which saw a 13% increase in claims during the paid media campaign.
- As anticipated, social media drove the highest overall engagement and actions however, it was a surprise to see Facebook deliver website traffic at a level on par with Instagram.
- We recommend testing TikTok further as although it had high impressions, the CTR was lower than FB/IG and it delivered less actions.
- When comparing Facebooks performance to Instagrams, its budget was one third the size, had a CTR three times larger, and a lower CPA. This performance deserves a budget increase.
- The top search term for English language activity were 'calkids' and 'calkids scholarship', while Spanish language users searched specifically for 'calkids'. This supports the value of Google Search in future campaigns.
- Ultimately, without outcome tracker pixels we are unable to say which platform and tactics drive the most account claims.

Appendix

Back to School Campaign Added Value

Additional No-Charge CalKIDS Message Exposure

Media	Added Value Description	Impressions	Value
Facebook/Instagram	Lower CPM resulting in additional impressions	5,897,653	\$57,742
TikTok	Lower CPM resulting in additional impressions	7,335,571	\$33,420
Programmatic Video	Lower CPM resulting in additional impressions	1,111,345	\$20,859
Display Banners	Lower CPM resulting in additional impressions	1,419,387	\$10,012
Audio Streaming	Lower CPM resulting in additional impressions	1,861,863	\$14,008
	Total	17,625,819	\$136,040
		+29%	+21%

Student - Creative Ad Unit Performance

	Platform	Language	Creative	Creative Ad Unit	Impressions	Clicks	CTR	Spend	Completion Rate	CPC	CPM	CPCV	Action*	CPA	
#1 English Actions	Instagram	EN	Video	Teehehe Female	3,938,531	39,640	1.01%	\$42,649	4.0%	\$1.08	\$10.83	\$0.296	10,072	\$4.23	
	Instagram	EN	Video	Generation Gap	2,670,030	42,952	1.61%	\$28,829	11.2%	\$0.67	\$10.80	\$0.114	5,650	\$5.10	
	Facebook	EN	Video	Teehehe Female	816,040	22,030	2.70%	\$9,718	5.7%	\$0.44	\$11.91	\$0.286	3,151	\$3.08	
#1 English CTR	Facebook	EN	Video	Generation Gap	607,585	33,320	5.48%	\$15,600	15.9%	\$0.47	\$25.67	\$0.576	2,988	\$5.22	
	Instagram	EN	Image Ad	Female (9/17)	1,038,911	5,212	0.50%	\$9,316	-	\$1.79	\$8.97	-	2,632	\$3.54	
#1 Spanish Actions	Tik Tok	EN	Video	Teehehe Female	4,434,812	27,704	0.62%	\$12,119	0.7%	\$0.44	\$2.73	\$0.412	1,561	\$7.76	
	Instagram	SP	Video	Teehehe Male	910,575	8,236	0.90%	\$14,265	4.5%	\$1.73	\$15.67	\$0.446	1,082	\$13.18	
	Tik Tok	EN	Video	Generation Gap	3,005,429	38,196	1.27%	\$18,223	2.4%	\$0.48	\$6.06	\$0.270	824	\$22.12	
	Tik Tok	SP	Video	Talking Head	2,800,457	16,687	0.60%	\$13,350	0.6%	\$0.80	\$4.77	\$0.826	800	\$16.69	
	Facebook	EN	Image Ad	Female	132,713	2,277	1.72%	\$1,539	-	\$0.68	\$11.60	-	553	\$2.78	
	Instagram	SP	Video	Talking Head	513,573	5,417	1.05%	\$8,090	2.9%	\$1.49	\$15.75	\$0.674	480	\$16.85	
	Tik Tok	SP	Video	Teehehe Male	2,541,108	19,375	0.76%	\$11,141	0.8%	\$0.57	\$4.38	\$0.547	468	\$23.80	
	Facebook	SP	Video	Teehehe Male	295,103	5,366	1.82%	\$4,281	4.7%	\$0.80	\$14.51	\$0.400	304	\$14.08	
	#1 Spanish CTR	Facebook	SP	Video	Talking Head	221,434	4,565	2.06%	\$3,553	3.2%	\$0.78	\$16.04	\$0.628	264	\$13.46
		Tik Tok	EN	Image Ad	Image Ad (9/17)	67,343	1,336	1.98%	\$304	-	\$0.23	\$4.51	-	33	\$9.20
	Prog	SP	Video	Teehehe Male	1,802,727	23,781	1.32%	\$37,258	76.8%	\$1.57	\$20.67	\$0.028	-	-	
	Prog	SP	Video	Talking Head Prepping	1,281,932	15,825	1.23%	\$26,225	69.6%	\$1.66	\$20.46	\$0.030	-	-	
	Prog	EN	Video	Generation Gap Nathan	1,854,298	22,328	1.20%	\$37,700	76.2%	\$1.69	\$20.33	\$0.027	-	-	
	Prog	EN	Video	Teehehe Female	1,697,867	20,142	1.19%	\$33,560	80.0%	\$1.67	\$19.77	\$0.026	-	-	
	Spotify	EN	Display	English - Banner B	1,846,224	7,016	0.38%	\$13,383	87.2%	\$1.91	\$7.25	-	-	-	
	Spotify	EN	Display	English - Banner A	1,060,193	3,537	0.33%	\$8,767	88.2%	\$2.48	\$8.27	-	-	-	
	Spotify	SP	Display	Banner A	165,692	390	0.24%	\$1,177	94.5%	\$3.02	\$7.10	-	-	-	
	Spotify	SP	Display	Audio (added 10/1)	757,763	1,362	0.18%	\$6,058	95.9%	\$4.45	\$8.00	-	-	-	
	Spotify	SP	Display	Banner B	758,486	1,333	0.18%	\$6,058	95.9%	\$4.54	\$7.99	-	-	-	
	Prog	SP	Native	Native	320,176	312	0.10%	\$3,774	-	\$12.10	\$11.79	-	-	-	
	Prog	SP	Video	Native	307,658	288	0.09%	\$3,261	-	\$11.32	\$10.60	-	-	-	
	Student Total				35,846,660	368,627	1.03%	\$370,197*	3.20%	\$1.00	\$10.33	\$0.568	30,862	\$6.25	

- Overall, "generation gap" appears to be the most engaging creative ad unit while the female "teehehe" drove the most actions.
- The Male "teehehe" Instagram ad generated the most actions amongst the Spanish language audience.

Google Pmax Search Terms

English Language

Search terms	Impressions	Clicks	CTR	Conversions
calkids	9,741	5,391	55.34%	2,212
cal kids	3,994	2,268	56.79%	948
calkids org	2,180	1,379	63.26%	849
→ calkids scholarship	728	419	57.55%	218
→ cal kids scholarship	300	172	57.33%	109
calkid	201	130	64.68%	57
cal kids org	90	56	62.22%	38
callids	127	56	44.09%	17
calkids account	121	49	40.50%	23
what is calkids	259	47	18.15%	22
→ scholarships	635	43	6.77%	16
calkids grant	58	36	62.07%	18
529 plan california	386	33	8.55%	11
cal kid	52	31	59.62%	14
cal kids grant	65	31	47.69%	13
www calkids org	40	31	77.50%	10
college grants	578	29	5.02%	15
stanford university scholarships	320	29	9.06%	7
california 529	311	25	8.04%	3
cakids	39	23	58.97%	8

Spanish Language

Search terms	Impressions	Clicks	CTR	Conversions
calkids	722	458	63.43%	108
calkids org	132	98	74.24%	25
becas benito juarez	482	52	10.79%	0
cal kids	46	22	47.83%	3
www calkids org	20	18	90.00%	6
calkids que es	48	15	31.25%	2
becas benito Juárez 2024	178	12	6.74%	0
beca benito Juárez 2024	77	11	14.29%	0
calkids que es y para que sirve	67	10	14.93%	0
kalkids	9	7	77.78%	3
→ beca calkids	8	7	87.50%	1
que es calkids	42	7	16.67%	0
stanford university scholarships	40	7	17.50%	0
scholarships	39	7	17.95%	0
beca benito juarez	70	6	8.57%	0
becas benito Juárez	37	6	16.22%	0
calkis	9	6	66.67%	0
gob mx becasbenitojuarez	34	5	14.71%	0
becas de stanford	27	5	18.52%	0
calkid	7	4	57.14%	2

- “Calkids” is the top search term for both English and Spanish language searchers, indicating that students who discover the program on other platforms are driven to seek more information through Google.

GA4 Terminology

Average Engagement Time

Average engagement time tells you the average amount of time people spend on your website or app. This metric is calculated by dividing the total time by the total number of users. To calculate time, a user needs to spend at least one second on a page, and Google Analytics only counts the amount of time when the browser is visible (time is not counted when the browser or tab is hidden or minimized). See also user engagement and average engagement time per session.

Average Engagement Time per Session

This metric is similar to average engagement time but based on sessions instead of users. This metric is calculated by dividing the total time by the total number of sessions. See also average engagement time.

Bounce Rate

Bounce rate is the percentage of sessions that last less than ten seconds, do not include a conversion, and/or only include one page view. In GA4 bounce rate is the percentage of sessions that are not 'engaged'. See also engaged sessions.

Direct

Direct traffic includes people who typed your website's URL into their browser or clicked a link in an email application (that didn't include campaign tags). Direct sessions will also include other cases where Google Analytics cannot identify the source of the click. Google Analytics will only assign 'direct' as a last resort. When a known source is used, that source will be attributed to the session.

Engagement Rate

The engagement rate metric is calculated by dividing the number of engaged sessions by the total number of sessions. For example, if there were 70 engaged sessions and a total of 100 sessions, then the engagement rate would be 70%. See also engaged sessions.

Engaged Sessions

Google Analytics will report an engaged session when a session lasts longer than ten seconds, when a session includes at least one conversion, or when a session includes two or more page views. You can adjust the amount of time for a session to be considered engaged. To do this, you need to open the data stream, select 'Configure Tag Settings', then 'Show All', and choose 'Adjust Session Timeout'. See also engagement rate.

Not Set

Not set can be seen in a number of different reports and indicates that a particular piece of information is not available within the report. For example, in the city report not set indicates that Google Analytics could not determine someone's exact geographic location when they accessed your website. While not set in the acquisition reports can occur when a campaign tagged URL hasn't been fully constructed (for example, if 'source' isn't defined, it will be displayed as not set within the report).

User Engagement

User engagement measures how long people have viewed your content, including pages and screens. Google Analytics calculates time using the **user_engagement** event, which is automatically collected when someone navigates to another page on your website or leaves your website. Time is only counted when the page or screen is visible. For example, when a tab is hidden, this time is not included in the user engagement metric. See also average engagement time.

UTM Tag

UTM tags are the individual query parameters used to make up a campaign-tagged URL. The UTM tags include utm_name, utm_source, utm_medium, utm_term, utm_content, and utm_id. UTM stands for 'Urchin Traffic Monitor' (Urchin was the precursor to Google Analytics). See also campaign tags.