

**California Achieving a Better  
Life Experience Board**

**2016-17 Strategic Plan**

DRAFT

## **Executive Summary**

Prior to the Federal Stephen Beck, Jr. Achieving a Better Life Experience Act of 2014 (Federal Act), people with disabilities were not allowed to have more than \$2,000 in liquid assets without their vital state and federal benefits being suspended or drastically reduced.

In 2015, the California State Legislature created the California Achieving a Better Life Experience Board (CalABLE or the Board) and tasked it with developing tax-advantaged savings accounts for people with disabilities to be able to accumulate liquid assets of up to \$100,000 and not have their SSI or other public benefits suspended/impacted.

As of July 1, 2016, CalABLE was allocated a General Fund loan of \$1.5 million dollars over two years to implement this new program. The Board was given 3 personnel years: An Executive Director, a Staff Services Manager I, and an Associate Governmental Program Analyst.

Dozens of states have opened their ABLE programs and more will be coming soon. California is going to be able to open its doors to participants in 2017. In the meantime, along with setting up the internal infrastructure for this new state agency, staff will develop state regulations, hire consultant service providers, and design a Request For Proposal to begin to design the California program.

## **Vision**

To provide greater financial security to Californians living with a disability.

## **Mission**

To meet the diverse needs of our customers and their families. We pledge to be customer driven, accountable, and a trusted partner in providing financial services. We are committed to transparent, accessible services that meet the needs of our participants.

## Values

**Adaptability and Flexibility** – We will encourage an entrepreneurial mindset to consistently improve and solve problems through creativity and feedback from our customers.

**Humility** – We seek to listen and learn from our participants and our peers.

**Integrity** – We are committed to operating business in a reliable and trustworthy fashion.

**Transparency and Accountability** – We will always take ownership and responsibility for our actions and outcomes.

**Sustainability** – We are committed to growing ABLE accounts in a responsible manner that will promote long term sustainability of the program and long term growth of account balances.

**Collaboration**– We will not operate in a silo; we will engage stakeholders at multiple levels to ensure consistency across impacted federal and state agencies.

## Strategic Objectives

- Efficient Program Administration
- Effective External Communications
- Effective Outreach and Education
- Effective CalABLE Board Meetings
- Innovative Solutions to Resource Limitations

## Measures (Key Performance Indicators, Timeline and Deliverables)

Efficient Program Administration (On-Going, Quarterly Reporting)

- Development of Internal Processes and Procedures
- Contract Management

- Budget Management
- Develop and Finalize Implementation Work Plan
- Staff Level Monitoring
- State Regulation Development/Adoption
- Implementation Plan Phase I
- Implementation Plan Phase II

Effective External Communications (On-Going, Quarterly Reporting)

- Stakeholder Advisory Council
- Public Agency Advisory Council
- Social Media Engagement
- Staff Presentations/Speaking Engagements throughout the State
- Involvement with National ABLE Working Group
- Involvement with National Association of State Treasurer's (NAST) Working Group

Effective Outreach and Education (On-Going, Quarterly Reporting)

- Participant Survey
- Education Materials
- Webinars
- Fact Sheets
- Presentation Power Point Development
- Brochures
- CalABLE Ambassador Program
- ADA Compliant, Comprehensive Website

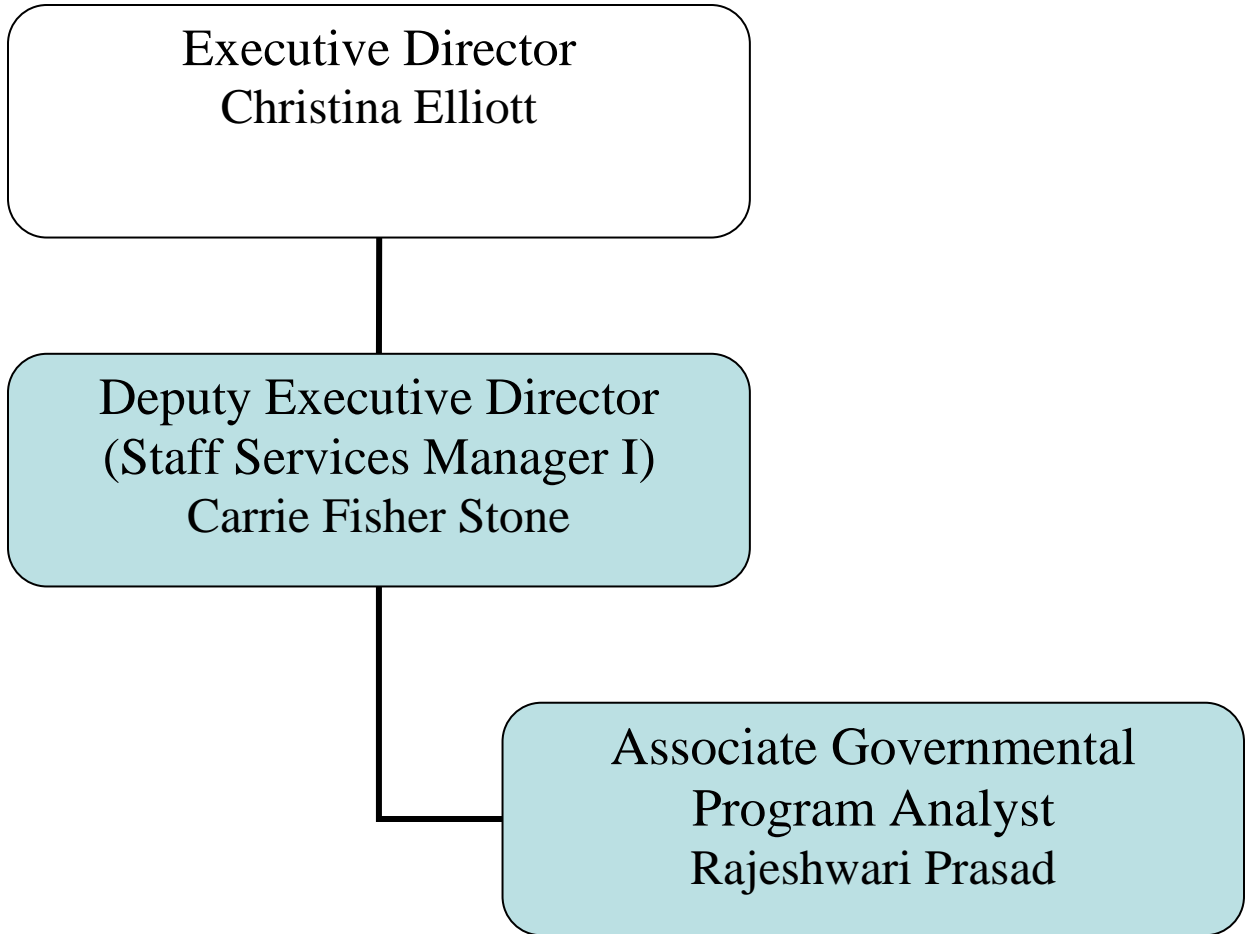
Effective CalABLE Board Meetings (On-Going, Monthly Reporting)

- Board Cycle Deadlines
- Agenda Development
- Board Education
- Board Training

Innovative Solutions to Resource Limitations (On-Going, Monthly Reporting)

- USC Graduate Student Capstone Project
- Utilization of State and Regional Stakeholder Networks to Educate Potential Beneficiaries

# CaABLE Organization Structure



## Resources

### Personnel

Executive Director  
Staff Services Manager I  
Associate Governmental Program Analyst

On Loan:  
Staff Treasury Program Manager II – Retired Annuitant

### Finance/ Budget

FY 16-17 Total Budget \$850,000

Total Personnel \$361,000

Salaries \$256,000

Benefits \$105,000

OE&E Total: \$489,000

OE&E Breakdown:

General Expense	12,000
Printing	2,000
Communication	9,000
Postage	2,000
Travel-In-State	3,000
Travel-Out-of-State	6,000
Training	3,000
Facilities Ops.	12,000
Facilities Ops.-others	3,000
C&P svcs - Internal-STO	45,000
C&P svcs - Internal-Other	0
C&P svcs - AG	0
C&P - External	359,000
Consolidated Data Ctr	0
DP Charges	3,000
Prorata (Special Fund)	0
Data Processing	0
Major Equipment	30,000
Other Items of Expense	0
Debt Payment	0