

---

**DECEMBER 13, 2022**

**AGENDA ITEM 2  
INFORMATION ITEM**

**CALIFORNIA ABLE ACT BOARD**

---

Executive Director's Report

***Background***

The Executive Director's Report includes an overview on the following items:

- National Association of State Treasurers (NAST) Update
- Program Update
  - Federal Legislative and Rulemaking Update
  - Enrollment Data
- Operations Update
  - Prepaid Card
  - Staffing
  - Board Membership
  - Budget
  - Contracts
- Outreach Update

***Presenter***

Dante Allen, Executive Director, California ABLE Act Board

***Attachments***

- Attachment #1 – H.R. 1219 Cosponsors
- Attachment #2 – CalABLE Q3 Enrollment Data
- Attachment #3 – CalABLE Budget
- Attachment #4 – CalABLE Social Media Report

This page is intentionally left blank.

**CALIFORNIA ACHIEVING A BETTER LIFE EXPERIENCE ACT BOARD**  
**EXECUTIVE DIRECTOR'S REPORT**

**December 13, 2022**

**National Association of State Treasurers (NAST) Update**

Passage of the ABLE Age Adjustment Act continues to be a possibility before the end of the year. Indications have remained consistent that the bill, which would bring ABLE eligibility to an additional 6.2 million people nationally, including 1 million disabled veterans, is poised to be included in a legislative package during the lame duck session of congress.

NAST Treasurers have been encouraged to actively communicate with their respective legislators to continue to stress the priority of passage in this congress. Treasurer Ma over the last few weeks has made direct outreach through text messages and phone calls to the California delegation in thanks of their previous statements of support to encourage them to keep ABLE Age Adjustment in the discussion of priorities for the end of the year.

After three years as Chair of the NAST ABLE Committee, Treasurer Ma has handed leadership of the newly formed ABLE Savings Plan Network (ASPN) to Treasurer Stacy Garrity of Pennsylvania. Treasurer Ma will continue with ASPN as Chair Emeritus and member of the Executive Board. Through her leadership term, Treasurer Ma has led the development of ASPN, the creation of the national campaign ABLEtoday, and all of the progress to get the ABLE Age Adjustment Act to the finish line. Her leadership has positioned California and CalABLE as national leaders in the progression of ABLE and has broadened our impact and influence on the national stage.

**Program Update**

**Federal Legislative and Rulemaking Update**

Increases to the IRS gift tax exemption to \$17,000 in 2023 (currently \$16,000) and the federal poverty limit \$13,590 (up from \$12,880 in 2022) were announced. These new announcements will increase the potential contributions of account holders to their CalABLE account to a potential \$30,590 per year. This includes annual account contribution from all sources of \$17,000 and the maximum ABLE to Work contribution of employed ABLE account holders who are not participating in an employer-based retirement program.

The ABLE Age Adjustment Act continues to be active in Congress. H.R. 1219 (Cardenas) authored the bill to increase the age threshold for eligibility for such programs from 26 to 46. It has been referred to the House Committee on Ways and Means (2/23/21). S.331 (Casey) authored the bill to increase the age

threshold for eligibility for such programs from 26 to 46. An estimated 6.2 million disabled Americans will become eligible to open ABLE accounts if these bills pass into law.

CalABLE staff is working to identify current account holders and potential account holders to advocate for ABLE Age Adjustment. Congressman Salud Carbajal from California's 24<sup>th</sup> District has signed on to co-sponsor the ABLE Age Adjustment Act (See Attachment #1 for H.R. 1219 Cosponsors). Additionally, the Board issued Resolution ABLE 03-22 supporting the passage of this bill and continues to support Treasurer Ma's efforts to promote the passage of this bill to the California delegation in congress.

### **Enrollment Data** (See Attachment #2)

CalABLE gained nearly 500 accounts over the quarter (8,097 in Q2 vs. 8,416 in Q3). Prior data from Q1 vs Q2 saw 1,000 accounts opened with a decrease in assets under management by 1%.

Despite our slowing account growth and overall challenges in the financial market, our assets under management actually increased. CalABLE has \$79 million in assets under management for Q3, this is up from Q2 by 3%. Average contributions were down 6% from Q2, redemptions were down 11% from Q2, and the average account balance was down 1% from Q2.

Performance in the FDIC-Insured portfolio was bolstered by an increase of its APY from 0.23% at the beginning of the quarter to 0.50% at the end of the quarter. Currently, the APY for the FDIC portfolio is 0.75%. Additionally, investments in the conservative and moderate portfolios were aided by allocations in the TIAA-CREF Life Funding Agreement which had an annual rate of return of 1.05% in Q3. Had the Funding Agreement not been in place, these portfolios would have experienced greater declines than they did. This highlights the benefit of having the Funding Agreement included as an underlying investment in those portfolios. The current annual rate of return for the Funding Agreement is 2.95%.

Notable element: participation in the FDIC portfolio has crept up from previous quarters. Total assets in the FDIC portfolio reached 40% for the first time since program inception, up from 38% in Q2. As a reminder, the Board elected to waive the state administrative fee for assets held in the FDIC portfolio. That decision was based on staff estimates that approximately 1/3 of program assets would be held in the FDIC portfolio. No action is recommended at this time in relation to the waiver, however this is an area the Board should continue to monitor and review when a new program administrator is selected. The revenue generated through the state administrative fee has direct bearing on our ability to reach self-sustainability and repay the general fund loans that supported the launch of CalABLE.

CalABLE has engaged program consultant AKF to explore the cash equivalent options of ABLE programs across the nation, with the goal of gaining additional perspective on how other programs are addressing fees as they relate to FDIC, checking, and other products that are attracting risk averse account holders during this time of low market performance.

It is likely that CalABLE will need to explore an adjustment to program fees collected by the State once the new program administration contract is selected. This would be the ideal time to explore the effectiveness of the board's waiver of the state administrative fee for those who choose the FDIC portfolio.

## **Operations Update**

### **Prepaid Card**

The CalABLE prepaid card was released on October 27, 2022. Currently the card has 150 active cards and 589 cards requested. The new process is going smoothly with a positive customer experience.

### **Staffing**

CalABLE is actively recruiting for an SSA/AGPA bilingual position to assist with outreach efforts in the Spanish community.

I am currently waiting for the Senate to complete the confirmation process for me to join the Biden administration as Commissioner of the Rehabilitation Services Administration in the Office of Special Education and Rehabilitation Services (OSERS) of the Department of Education. I do not currently have an update regarding the timing of the confirmation process or my departure from CalABLE.

### **Board Membership**

Board member Lisa Hayes is scheduled to attend in representing the State Independent Living Council (SILC) as a new delegate has not been identified.

### **Budget** (See Attachment #3)

As of November 16, 2022, the most recent available reporting, the program has spent \$189,397 in fiscal year 2022-23. CalABLE is currently receiving a general fund allocation and loan repayments are scheduled to begin in 2025.

### **Contracts** (See Attachment #3)

CalABLE released an RFP for Program Administrator, the contract will include funds for program enhancements. Proposals are due January 10, 2023, at 12:00 PM PT.

CalABLE cancelled the contract with Class Act Interpreting Services for \$14,000. A new RFQ will be issued in January 2023 for \$10,500 beginning 2/23-6/24 with a one-year option to renew.

**Outreach Update**

Our webinar 2022 attendance continues to be popular with over 50% attendance. Our YouTube channel has 722 subscribers with the most popular webinars: ABLE 101 at 8,272 views, Tips for Opening a CalABLE Account at 755 views, and Special Needs Trust at 502 views. CalABLE will continue to present webinars about the CalABLE program. CalABLE’s last webinar for 2022 will be Maximizing Your Year-End Contributions.

In December, CalABLE toured the PRIDE Industries facility in Roseville, CA, and presented at the Transitions 2022 Conference in Lancaster, CA. Treasurer Ma will be presenting to the Statewide Disability Advisory Council. CalABLE will continue to look for in-person outreach opportunities in addition to presentations and the monthly webinar series.

The CalABLE website traffic continues to have 80% new visitors and 20% repeat visitors, with 33% accessing the website from their mobile phones. The Q4 newsletter produced by TIAA currently has 104 views, with the average views per quarter being 245 views.

An analysis of CalABLE’s Facebook posts for 2022 was completed by CalABLE staff (See Attachment #4). Posts featuring the CalABLE ambassadors were the most popular content in terms of reach, likes and reactions, and shares. Other popular content included CalABLE webinar flyers and posts from CalABLE campaigns such as We Are CalABLE, the Americans with Disability Act Anniversary, and Financially ABLE. Staff recommended creating more social media content featuring the ambassadors.

*Outreach Events Fourth Quarter*

Date	Event	Attendees	Webinar	Sponsorship
10/5/2022	Autism Tree Foundation Lunch and Learn (6)	15		
10/5/2022	Mental Health Service-Suicide Prevention	15		
10/12/2022	Jobtoberfest- San Diego	500		
10/13/2022	Disability Employment Awareness Fair	50		
10/13- 14/2022	Supported Life Conference	100		

10/20/2022	Regional Center of the East Bay	10		
10/27/2022	Veterans Advisory Commission Santa Barbara County	10		
10/28/2022	Lighthouse for the Blind	150		
11/2/2022	Webinar- Prepaid Card and ALR		136	
11/4/2022	Riverside University Health System	15		
11/5/2022	Triumph's Adaptive Sports Festival			818
11/9/2022	SDRC Employment Roundtable	50		
11/14/2022	Nami- South Bay LA	30		
11/15/2022	California Children's Services County of San Diego Health & Human Services Agency	20		
11/17/2022	Disabled Voices of Color Speaker Series	30		
11/17/2022	Santa Barbara County Veterans Collaborative (SBCVC)	20		
11/18/2022	Inland Empire Women Veterans Collaborative Network Meeting	10		
11/19/2022	San Francisco Chapter, California Council of the Blind	20		
11/19/2022	San Diego Legal Aid Gala			200
<b>Q4 Total</b>		1045	136	1018

This page is intentionally left blank.



Attachment #1  
H.R. 1219 Cosponsors

This page is intentionally left blank.

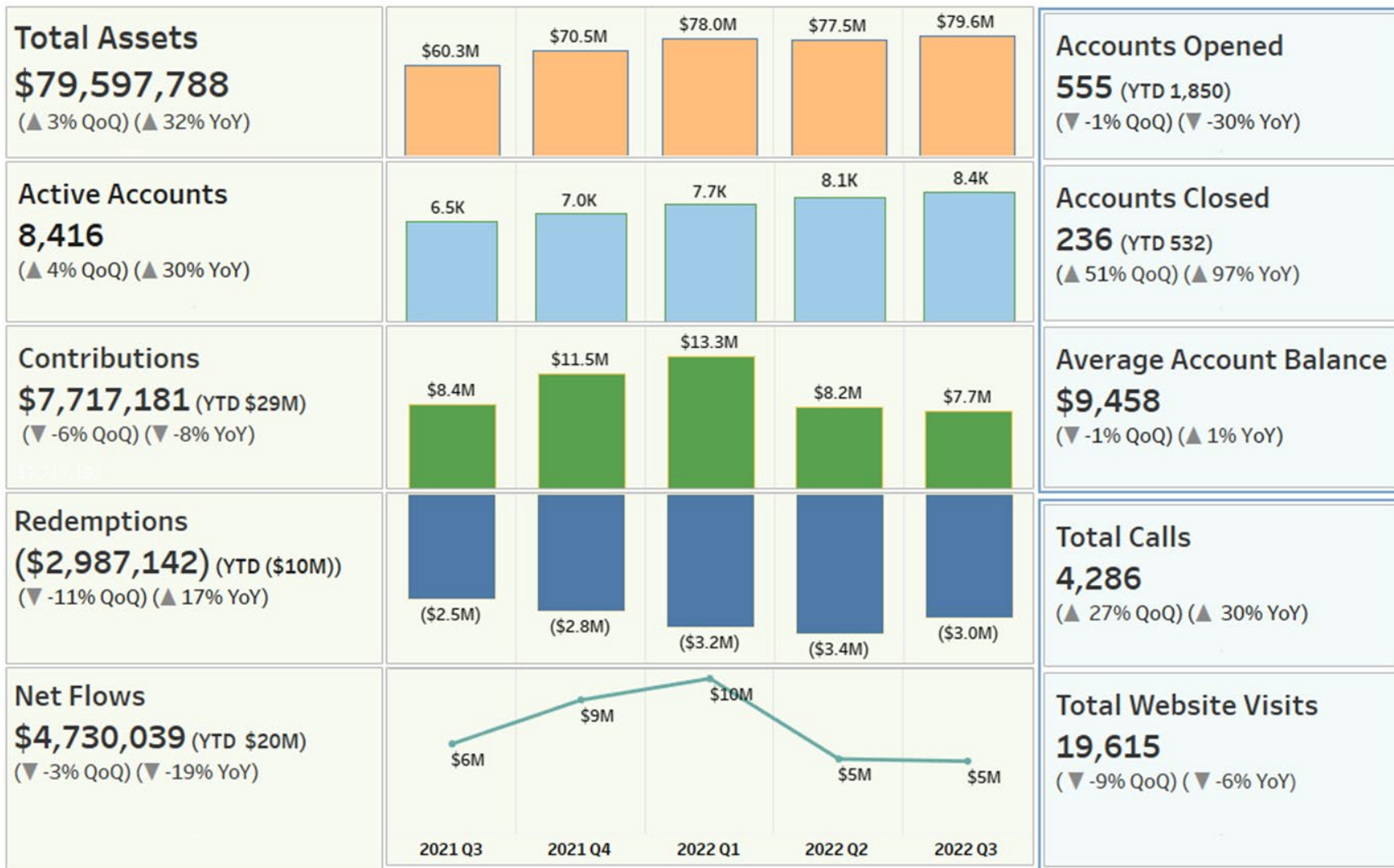
<b>Cosponsor</b>	<b>Date Cosponsored</b>
<a href="#">Rep. McMorris Rodgers, Cathy [R-WA-5]*</a>	02/23/2021
<a href="#">Rep. Chu, Judy [D-CA-27]*</a>	02/23/2021
<a href="#">Rep. Fitzpatrick, Brian K. [R-PA-1]</a>	03/03/2021
<a href="#">Rep. Luetkemeyer, Blaine [R-MO-3]</a>	03/16/2021
<a href="#">Rep. Ruppersberger, C. A. Dutch [D-MD-2]</a>	03/16/2021
<a href="#">Rep. Mann, Tracey [R-KS-1]</a>	04/05/2021
<a href="#">Rep. Herrell, Yvette [R-NM-2]</a>	04/05/2021
<a href="#">Del. Norton, Eleanor Holmes [D-DC-At Large]</a>	04/05/2021
<a href="#">Rep. Wagner, Ann [R-MO-2]</a>	04/05/2021
<a href="#">Rep. Blunt Rochester, Lisa [D-DE-At Large]</a>	04/05/2021
<a href="#">Rep. Welch, Peter [D-VT-At Large]</a>	04/05/2021
<a href="#">Rep. Houlahan, Chrissy [D-PA-6]</a>	04/05/2021
<a href="#">Rep. Wild, Susan [D-PA-7]</a>	04/05/2021
<a href="#">Rep. Bass, Karen [D-CA-37]</a>	04/05/2021
<a href="#">Rep. Davis, Danny K. [D-IL-7]</a>	04/05/2021
<a href="#">Rep. Brownley, Julia [D-CA-26]</a>	04/05/2021
<a href="#">Rep. Schneider, Bradley Scott [D-IL-10]</a>	04/05/2021
<a href="#">Rep. Pressley, Ayanna [D-MA-7]</a>	04/05/2021
<a href="#">Rep. McKinley, David B. [R-WV-1]</a>	04/05/2021
<a href="#">Rep. Raskin, Jamie [D-MD-8]</a>	04/05/2021
<a href="#">Rep. Cartwright, Matt [D-PA-8]</a>	04/05/2021
<a href="#">Rep. Scanlon, Mary Gay [D-PA-5]</a>	04/05/2021
<a href="#">Rep. Smith, Adam [D-WA-9]</a>	04/05/2021
<a href="#">Del. San Nicolas, Michael F. Q. [D-GU-At Large]</a>	04/05/2021
<a href="#">Rep. Titus, Dina [D-NV-1]</a>	04/05/2021
<a href="#">Rep. Trone, David J. [D-MD-6]</a>	04/05/2021
<a href="#">Rep. Grijalva, Raúl M. [D-AZ-3]</a>	04/05/2021
<a href="#">Rep. Moore, Gwen [D-WI-4]</a>	04/05/2021
<a href="#">Rep. Cohen, Steve [D-TN-9]</a>	04/05/2021
<a href="#">Rep. Kilmer, Derek [D-WA-6]</a>	04/05/2021
<a href="#">Rep. Pingree, Chellie [D-ME-1]</a>	04/05/2021
<a href="#">Rep. LaTurner, Jake [R-KS-2]</a>	04/15/2021
<a href="#">Rep. Panetta, Jimmy [D-CA-20]</a>	04/15/2021
<a href="#">Rep. Smith, Jason [R-MO-8]</a>	04/15/2021
<a href="#">Rep. Sánchez, Linda T. [D-CA-38]</a>	04/15/2021
<a href="#">Rep. Larson, John B. [D-CT-1]</a>	04/15/2021
<a href="#">Rep. Long, Billy [R-MO-7]</a>	04/15/2021
<a href="#">Rep. McBath, Lucy [D-GA-6]</a>	04/15/2021
<a href="#">Rep. Lieu, Ted [D-CA-33]</a>	04/15/2021
<a href="#">Rep. Owens, Burgess [R-UT-4]</a>	04/20/2021
<a href="#">Rep. Blumenauer, Earl [D-OR-3]</a>	04/20/2021
<a href="#">Rep. Meuser, Daniel [R-PA-9]</a>	04/20/2021
<a href="#">Rep. Davids, Sharice [D-KS-3]</a>	04/20/2021
<a href="#">Rep. Langevin, James R. [D-RI-2]</a>	04/21/2021
<a href="#">Rep. Bonamici, Suzanne [D-OR-1]</a>	04/21/2021
<a href="#">Rep. Sessions, Pete [R-TX-17]</a>	04/21/2021
<a href="#">Rep. Harshbarger, Diana [R-TN-1]</a>	05/04/2021
<a href="#">Rep. Evans, Dwight [D-PA-3]</a>	05/04/2021
<a href="#">Rep. Pence, Greg [R-IN-6]</a>	05/04/2021
<a href="#">Rep. Case, Ed [D-HI-1]</a>	05/04/2021
<a href="#">Rep. Mrvan, Frank J. [D-IN-1]</a>	05/04/2021
<a href="#">Rep. DeFazio, Peter A. [D-OR-4]</a>	05/04/2021
<a href="#">Rep. Gallagher, Mike [R-WI-8]</a>	05/04/2021
<a href="#">Rep. Suozzi, Thomas R. [D-NY-3]</a>	05/11/2021
<a href="#">Rep. Carson, Andre [D-IN-7]</a>	05/11/2021
<a href="#">Rep. Quigley, Mike [D-IL-5]</a>	05/11/2021

<b>Cosponsor</b>	<b>Date Cosponsored</b>
<a href="#">Rep. Guest, Michael [R-MS-3]</a>	05/19/2021
<a href="#">Rep. Hartzler, Vicky [R-MO-4]</a>	05/19/2021
<a href="#">Rep. Schrader, Kurt [D-OR-5]</a>	05/25/2021
<a href="#">Rep. Herrera Beutler, Jaime [R-WA-3]</a>	06/11/2021
<a href="#">Rep. Garbarino, Andrew R. [R-NY-2]</a>	06/25/2021
<a href="#">Rep. Smucker, Lloyd [R-PA-11]</a>	07/01/2021
<a href="#">Rep. Slotkin, Elissa [D-MI-8]</a>	07/21/2021
<a href="#">Rep. Miller, Carol D. [R-WV-3]</a>	07/21/2021
<a href="#">Rep. Boyle, Brendan F. [D-PA-2]</a>	08/10/2021
<a href="#">Rep. Gallego, Ruben [D-AZ-7]</a>	08/10/2021
<a href="#">Rep. Tlaib, Rashida [D-MI-13]</a>	08/10/2021
<a href="#">Rep. Sarbanes, John P. [D-MD-3]</a>	08/10/2021
<a href="#">Rep. Dean, Madeleine [D-PA-4]</a>	08/31/2021
<a href="#">Rep. Bacon, Don [R-NE-2]</a>	09/07/2021
<a href="#">Rep. McGovern, James P. [D-MA-2]</a>	10/21/2021
<a href="#">Rep. Graves, Sam [R-MO-6]</a>	11/30/2021
<a href="#">Rep. Jacobs, Sara [D-CA-53]</a>	01/06/2022
<a href="#">Rep. Lamb, Conor [D-PA-17]</a>	01/12/2022
<a href="#">Rep. Schakowsky, Janice D. [D-IL-9]</a>	01/25/2022
<a href="#">Rep. Frankel, Lois [D-FL-21]</a>	02/18/2022
<a href="#">Rep. Stansbury, Melanie Ann [D-NM-1]</a>	02/18/2022
<a href="#">Rep. Khanna, Ro [D-CA-17]</a>	02/18/2022
<a href="#">Rep. Fletcher, Lizzie [D-TX-7]</a>	03/09/2022
<a href="#">Rep. Kelly, Mike [R-PA-16]</a>	03/15/2022
<a href="#">Rep. Carl, Jerry L. [R-AL-1]</a>	03/31/2022
<a href="#">Rep. Moore, Barry [R-AL-2]</a>	04/07/2022
<a href="#">Rep. Delgado, Antonio [D-NY-19]</a>	05/03/2022
<a href="#">Rep. Garcia, Sylvia R. [D-TX-29]</a>	05/10/2022
<a href="#">Rep. Reschenthaler, Guy [R-PA-14]</a>	06/07/2022
<a href="#">Rep. Lowenthal, Alan S. [D-CA-47]</a>	06/07/2022
<a href="#">Rep. DeSaulnier, Mark [D-CA-11]</a>	06/07/2022
<a href="#">Rep. Joyce, John [R-PA-13]</a>	07/26/2022
<a href="#">Rep. Thompson, Glenn [R-PA-15]</a>	07/28/2022
<a href="#">Rep. Ross, Deborah K. [D-NC-2]</a>	08/12/2022
<a href="#">Rep. Rush, Bobby L. [D-IL-1]</a>	08/19/2022
<a href="#">Rep. Mooney, Alexander X. [R-WV-2]</a>	08/19/2022
<a href="#">Rep. Krishnamoorthi, Raja [D-IL-8]</a>	08/23/2022
<a href="#">Rep. Luria, Elaine G. [D-VA-2]</a>	08/30/2022
<a href="#">Rep. Beyer, Donald S., Jr. [D-VA-8]</a>	08/30/2022
<a href="#">Rep. Keller, Fred [R-PA-12]</a>	09/13/2022
<a href="#">Rep. Doyle, Michael F. [D-PA-18]</a>	09/22/2022
<a href="#">Rep. Pascrell, Bill, Jr. [D-NJ-9]</a>	09/29/2022
<a href="#">Rep. Lee, Barbara [D-CA-13]</a>	10/07/2022
<a href="#">Rep. Spanberger, Abigail Davis [D-VA-7]</a>	10/07/2022
<a href="#">Rep. Swalwell, Eric [D-CA-15]</a>	10/21/2022
<a href="#">Rep. Obernolte, Jay [R-CA-8]</a>	10/28/2022
<a href="#">Rep. Carbajal, Salud O. [D-CA-24]</a>	11/03/2022

Attachment #2  
Enrollment Data

This page is intentionally left blank.

# At A Glance Q3 2022



"QoQ Comparing to 2022 Q2 and YoY comparing to 2021 Q3"

CA/Able/2022/Q3

# Assets by Portfolio Q3 2022

Assets by Portfolio		%	QoQ	YoY
FDIC-INSURED PORTFOLIO	\$31.9M	40.1%	▲ 7%	▲ 53%
AGGRESSIVE GROWTH PORTFOLIO	\$18.1M	22.7%	▼ -1%	▲ 22%
MODERATE PORTFOLIO	\$15.3M	19.3%	▼ -1%	▲ 19%
CONSERVATIVE PORTFOLIO	\$14.2M	17.9%	▲ 1%	▲ 22%

CA/Able/2022/Q3



# Accounts by Portfolio Q3 2022

Accounts by Portfolio		%	QoQ	YoY
FDIC-INSURED PORTFOLIO	5,374	33.8%	▲ 6%	▲ 36%
CONSERVATIVE PORTFOLIO	3,664	23.0%	▲ 4%	▲ 28%
MODERATE PORTFOLIO	3,609	22.7%	▲ 3%	▲ 30%
AGGRESSIVE GROWTH PORTFOLIO	3,269	20.5%	▲ 4%	▲ 31%

CA/Ab14/2022/Q3

This page is intentionally left blank.

Attachment #3  
Budget

This page is intentionally left blank.

CalABLE Budget 2022-23  
(updated 12.1.22)

Legislative Loans Status					
Loan Information	Loan Authority	Amount Transferred	Transfer Date	Interest Rate	Repayment Due
SB 826 - Budget Act of 2016	\$850,000				6/30/2024
AB 97 - Budget Act of 2017	\$650,000				6/30/2024
SB840- Budget Act of 2018	\$1,750,000				6/30/2024
AB 74 - Budget Act of 2019	\$1,070,000				6/30/2024
SB 74 - Budget Act of 2020	\$500,000				6/30/2024
<b>Total</b>	<b>\$4,820,000</b>				

Staff Expenditures			
Description	Projected Expenditures	Y-T-D Actual Expenditures	% Spent
Personal Salaries and Wages	\$410,000	\$98,521	24%
Personnel Benefits	\$200,000	\$39,055	20%
<b>Total Staff Expenditures</b>	<b>\$610,000</b>	<b>\$137,576</b>	<b>23%</b>

Operating Equipment and Expenses			
Description	Projected Expenditures	Y-T-D Actual Expenditures	% Spent
In-State Travel	\$4,000	\$177	4%
Out-of-State Travel	\$0.0	\$0.0	0.0%
Contracts	\$649,000	\$48,352	7%
Administrative Expenses	\$151,000	\$3,291	2%
<b>Total OE&amp;E Expenditures</b>	<b>\$804,000</b>	<b>\$51,820</b>	<b>6%</b>

Total Program Expenditures				
General Fund Allocation	Current Year Staff Expenditures	Current Year OE&E Expenditures	Total Encumbered Funds	Total Loan Funds Remaining
<b>\$1,414,000</b>	<b>\$137,576</b>	<b>\$51,820</b>	<b>\$189,397</b>	<b>\$4,820,000</b>

External Contracts (Thru 12/1/22)					
Vendor	Term	Contract Total	Total Contract Expenditures	Remaining	% Spent
AKF Consulting Group 529A Program Consulting Services	12/1/21-11/30/23	\$275,731	\$85,757	\$189,973	31.10%
Meketa Investment Group, Inc 529A Investment Consulting Services	4/1/22-3/30/24	\$160,000	\$23,087	\$147,325	14.43%
Program 11, LLC Marketing Services	7/1/21-6/30/23	\$552,226	\$336,392	\$215,833	60.9%
TIAA-CREF Intuition 529A Program Plan Manager	9/1/18-8/31/23	\$695,500	\$695,500	\$0.00	100%
<b>Class Act Interpreting, Inc cancelled</b> Captioning Services	7/1/22-6/30/24	\$14,000	\$650	\$13,350	4.64%
Eaton Interpreting Services, Inc. ASL Interpreting Services	7/1/22-6/30/24	\$14,000	\$720	\$13,280	5.14%
Lazar Spanish Translation Services	7/1/22-6/30/24	\$14,000	\$200	\$13,800	1.43%
<b>Total</b>		<b>\$1,725,457</b>	<b>\$1,142,306</b>	<b>\$593,561</b>	<b>66.20%</b>

This page is intentionally left blank.

Attachment #4  
Social Media Report

This page is intentionally left blank.



## CalABLE Social Media Report for 2022

### **Research question**

Which organic social media content should CalABLE focus efforts on?

### **Background**

Social media is one of the key outreach methods that CalABLE uses to connect with the disability community. Program 11, the company that CalABLE uses for marketing, produces paid social media content. The CalABLE team is responsible for organic social media posts. These organic social media posts do not cost money to be posted, but they do take time and energy from the CalABLE team. The goal of this report is to determine which organic social media posts generate the best reach, likes and reactions, and shares. Reach is an estimate of the number of people who saw a post at least once. The results of this report will help the CalABLE team determine where to focus their social media efforts.

### **Data and Method**

Content data was exported from Meta Business Suite from January 1, 2022, to November 28, 2022. Data was limited to Facebook posts since stories did not include data on reach or interactions and Instagram posts were limited to the last half of 2022. Two posts were removed from the data set as these were boosted and had a much larger reach than the typical organic social media posts.

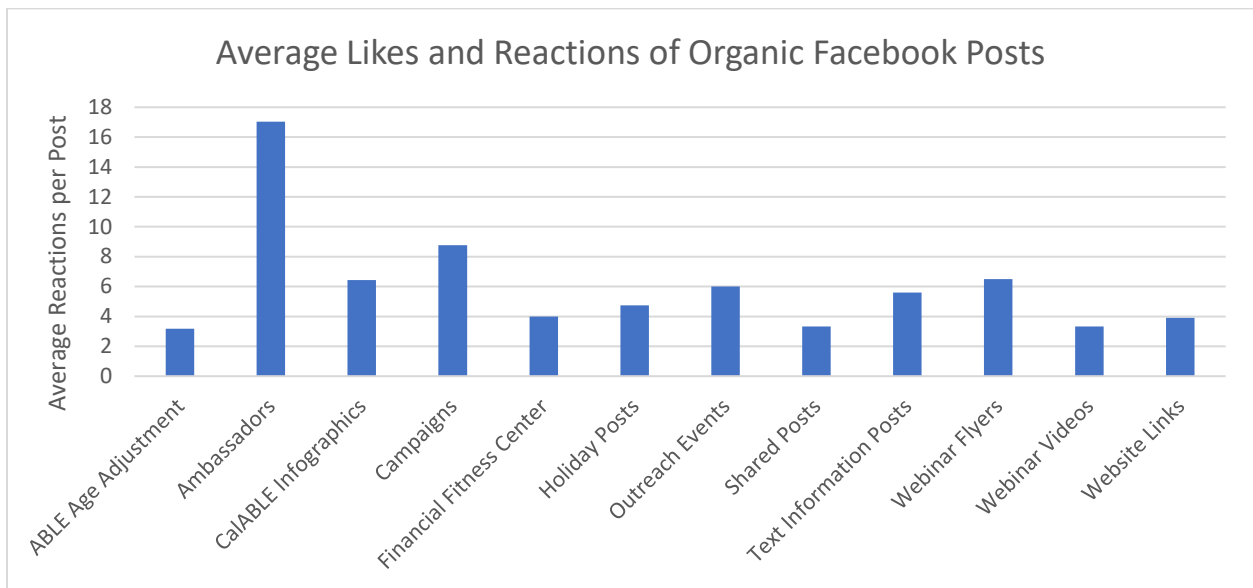
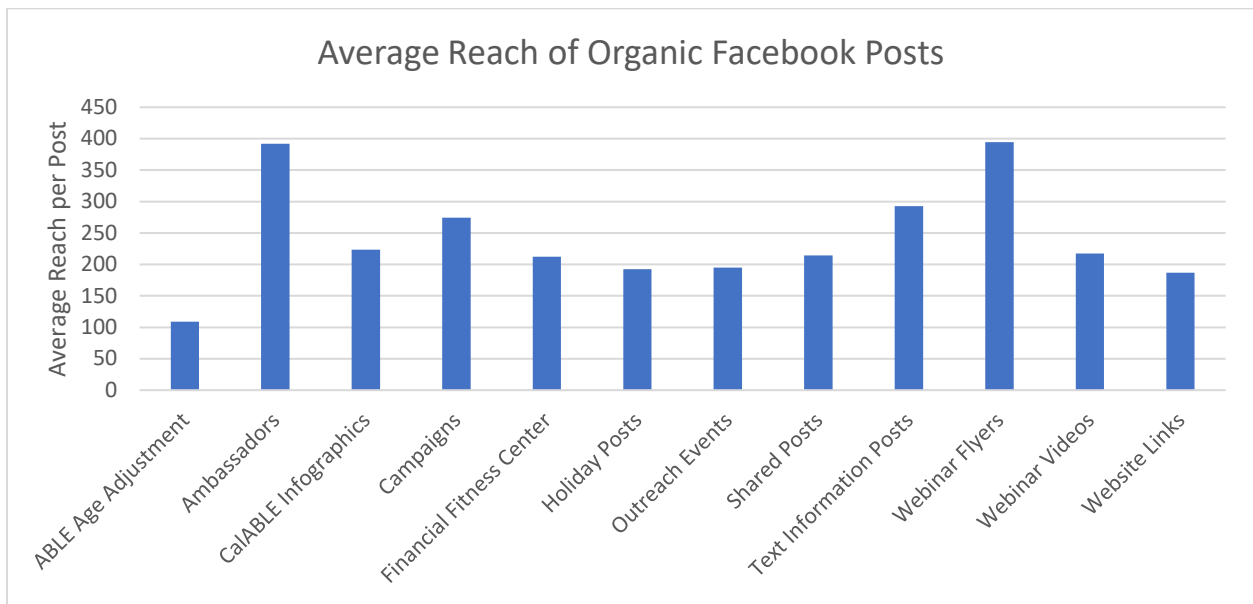
Posts were sorted into twelve categories:

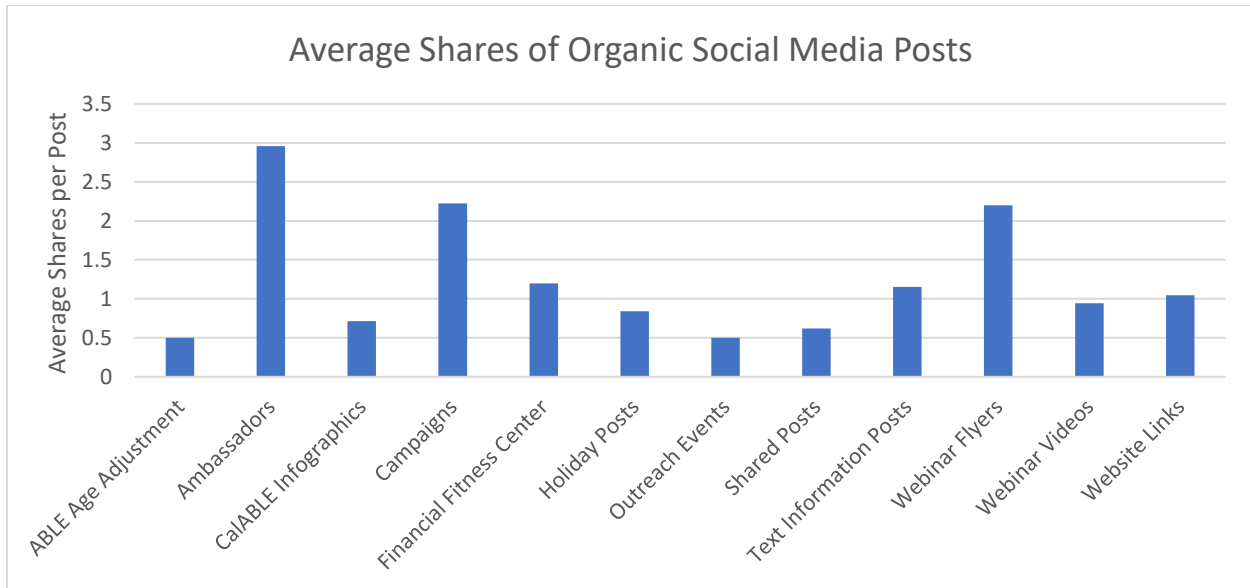
1. ABLÉ Age Adjustment – Posts discussing or calling audience to advocate for the ABLÉ Age Adjustment Act
2. Ambassadors – Posts featuring the CalABLE ambassadors
3. CalABLE Infographics – Images that provide information on CalABLE program features and how to use a CalABLE account
4. Campaigns – Posts featuring materials from the We Are CalABLE, ADA, and Financially ABLÉ Campaigns
5. Financial Fitness Center – Posts that link to Financial Fitness Center Modules
6. Holiday Posts – Posts wishing people a happy holiday or providing content related to a disability awareness day (not directly discussing CalABLE)
7. Outreach Events – Posts either advertising events CalABLE will be at or pictures of CalABLE staff attending events
8. Shared Posts – Posts that are shared from social media network

- 9. Text Information Posts – Information posts about CalABLE
- 10. Webinar Flyers – Posts promoting CalABLE webinars and panels CalABLE staff will be on
- 11. Webinar Videos – Posts linking to CalABLE’s YouTube Channel
- 12. Website Links – Posts linking to websites such as Social Security, Press Releases, News Articles, Conferences, etc

Data was then analyzed to determine which types of posts generated the most reach.

**Results**





Overall, posts featuring CalABLE ambassadors, webinar flyers, and campaigns have done the best in terms of reach, likes and reactions, and shares.

### Alternatives

1. Focus efforts on creating more high-quality content featuring ambassadors and real people. Reach out to social media influencers to be ambassadors. Continue to consistently promote webinars.
2. Continue to create a spread of social media content with a slight emphasis on ambassador and webinar content.
3. Collect more data since CalABLE's social media content has not been very consistent during 2022. Recycle older content such as text information posts to see if this content resonates more with the current CalABLE audience than the newer infographics that have been posted.

### Recommendation: Alternative 1

Overall, content featuring CalABLE ambassadors performed the best in terms of reach, likes and reactions, and shares. The CalABLE team should focus efforts to create more campaigns featuring ambassadors and real people such as social media influencers.

A recommended campaign for the end of the year would be having the ambassadors create videos on how they have used their CalABLE account for 2022. At the start of the year, the ambassadors could create videos on their goals for their CalABLE accounts for 2023.

This page is intentionally left blank.