
DECEMBER 12, 2023

**AGENDA ITEM 2
INFORMATION ITEM**

CALIFORNIA ABLE ACT BOARD

Executive Director's Report

Background

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

- Strategic Planning
- National Association of State Treasurers (NAST) Update
- Program Update
 - State Legislative Update
 - Enrollment Data
 - ABLE Accounts New Contributions
- Operations Update
 - Budget
 - Contracts
 - Prepaid Card
- Outreach Update
 - Ambassador Program
 - Webinars
 - Roadshow
 - Social Media
 - Website Traffic

Presenter

Dante Allen, Executive Director, California ABLE Act Board

Attachments

- Attachment #1 – SB 544 Bagley Keene Update 2023
- Attachment #2 – Budget
- Attachment #3 – CalABLE Roadshow Schedule

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

December 12, 2023

Strategic Planning

CalABLE Staff is nearing completion on an updated Strategic Plan covering calendar years 2024-2026. The central goal for this plan is to position CalABLE as the single largest ABLE program in the United States in terms of active accounts and assets under management. This aggressive goal will require accelerated growth, and expansion of strategic public/private partnerships. Staff will pursue legislative enhancements and philanthropic/corporate partnerships to initiate seed funding campaigns to further incentivize adoption of CalABLE accounts.

National Association of State Treasurers (NAST) Update

The ABLE Savings Plan Network (ASPN) has identified federal legislative priorities to extend ABLE provisions currently scheduled to sunset in 2025. These include ABLE to Work, the ability to rollover college savings to ABLE programs, and allows contributions to an ABLE account to qualify for the Savers Tax Credit.

Program Update

State Legislative Update (See Attachment #1)

AB 339 (California ABLE Age Adjustment): Staff have been monitoring, Assembly Bill 339 (Irwin), which would revise the definition of “eligible individual” under the Qualified ABLE Program by increasing the age limit for when an eligible individual’s blindness or disability occurred to 46 years of age to conform with federal ABLE Act beginning January 1, 2026. This bill would, commencing January 1, 2026, revise the definition of “eligible individual” under the Qualified ABLE Program. This bill would also conform, for taxable years beginning on or after January 1, 2026, state tax law to those changes relating to qualified ABLE programs made by the Consolidated Appropriations Act, 2023.

AB 339 (Irwin): has been signed by the Governor on October 7, 2023.

SB 544 (Open Meetings): Staff have been monitoring Senate Bill 544 (Laird), which would amend existing law that will remain operative after July 1, 2023, to remove indefinitely the teleconference requirements that a state body post agendas at all teleconference locations, that each teleconference location be identified in the notice and agenda of the meeting or proceeding, and that each teleconference location be accessible to the public. The bill would require a state body to provide a means by which the public may remotely hear audio of the meeting, remotely observe the meeting, or attend the meeting by providing on the

posted agenda a teleconference telephone number, an internet website or other online platform, and a physical address for at least one site. This bill would remove the rollcall vote requirement and the requirement for a quorum in attendance at the primary physical meeting location. The bill, instead, would require the majority of the board members of the state body to be present at the primary physical meeting location. The bill would require the members of the state body to visibly appear on camera during the open portion of a meeting that is publicly accessible via the internet or other online platform unless the appearance would be technologically impracticable, as specified. The bill would require a member who does not appear on camera due to challenges with internet connectivity to announce the reason for their nonappearance when they turn off their camera.

SB 544 was signed by the Governor on September 22, 2023.

Enrollment Data

CalABLE gained 425 accounts during the third quarter, this is down from Q2 by 12.4% CalABLE finished Q3 with active accounts.

CalABLE has \$111 million in assets under management for Q3, this is up from Q2 by 2.5%.

Contributions were down 10.5% from Q2, distributions were down 13.1% from Q2, and the average account balance was down 3.1% from Q2.

ABLE Accounts New Contributions

The annual contribution limit for ABLE accounts will increase to \$18,000 in 2024. This limit is based on the Federal Gift Tax Exemption, which has increased from \$14,000 when the first ABLE programs launched in 2015, to \$18,000 in 2024. Employed account owners, without employer-sponsored retirement plans will also be able to contribute earned income of up to \$32,580 in 2024 without impacting government benefits, allowing them to contribute up to \$14,580 in earnings with ABLE to Work.

Operations Update

Budget (See Attachment #2)

As of September 10, 2023, the most recent available reporting, the program has spent \$933,542 in fiscal year 2022-23. CalABLE is currently receiving a general fund allocation and loan repayments are scheduled to begin in 2025.

Contracts

Staff has amended contract ABLE 01-21 [AKF Consulting LLC] exercising the program's option for extension through November 31, 2024.

Staff has amended contract ABLE 04-21 [MEKETA Investment Group, Inc.], modifying key personnel, and exercising the program's option for extension of services and funds through March 31, 2025.

Prepaid Card

CalABLE's prepaid card was available upon launch of the Vestwell site. 959 prepaid cards have been issued from the time of conversion.

Outreach Update

Ambassador Program

Staff selected 8 ambassadors for 2024. The Ambassadors will be announced in March of 2024. The CalABLE Ambassadors are current account holders and authorized legal representatives who share their stories and help CalABLE promote the program.

Webinars

Staff hosted three webinars called CalABLE Tips for Opening an Account, Qualified Disability Expenses, and Maximizing Your CalABLE Account. These webinars had a total attendance of 709 people. CalABLE will be hosting a webinar on December 13 called CalABLE Special Needs Trusts. CalABLE has seen an increase in replays on previous webinars on YouTube with an average view of 15 minutes and 30% replays on recordings. CalABLE has experience new viewers visiting Tips for Opening an Account and Qualified Disability Expenses recordings.

Roadshow (Attachment #3)

Staff completed its roadshow with DOR, and we are now seeking to expand opportunities for networking and connections with Regional Centers and other organizations throughout California.

Social Media

Our YouTube channel has 900 subscribers. CalABLE gained 119 new subscribers in 2023. Program 11, CalABLE's marketing agency, has begun to release paid media ads again.

CalABLE staff have been posting organic social media posts on Facebook, Instagram, Twitter, and LinkedIn daily. CalABLE currently has 3182 Facebook

followers, 398 Instagram followers, 990 Twitter followers, and 103 LinkedIn followers.

Website Traffic

The CalABLE website traffic continues to have about 76% new visitors and 24% return visitors, with 33% accessing the website from their mobile phones 65% from a desktop and 2% from tablets. The total website visits were 22,817, representing an 8% increase compared to the last quarter.

Attachment #1
SB 544 Bagley Keene Update 2023

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2023 Cal. Legis. Serv. Ch. 216 (S.B. 544) (WEST)

CALIFORNIA 2023 LEGISLATIVE SERVICE

2023 Portion of 2023-2024 Regular Session

Additions are indicated by **Text**; deletions by

~~***~~

Vetoed are indicated by ~~Text~~ ;

stricken material by ~~Text~~ .

CHAPTER 216

S.B. No. 544

AN ACT to amend Section 11124 of, to amend, repeal, and add Section 11123.5 of, and to add and repeal Section 11123.2 of, the Government Code, relating to state government.

[Filed with Secretary of State September 22, 2023.]

LEGISLATIVE COUNSEL'S DIGEST

SB 544, Laird. Bagley-Keene Open Meeting Act: teleconferencing.

Existing law, the Bagley-Keene Open Meeting Act, requires, with specified exceptions, that all meetings of a state body be open and public and all persons be permitted to attend any meeting of a state body. The act authorizes meetings through teleconference subject to specified requirements, including, among others, that the state body post agendas at all teleconference locations, that each teleconference location be identified in the notice and agenda of the meeting or proceeding, that each teleconference location be accessible to the public, that the agenda provide an opportunity for members of the public to address the state body directly at each teleconference location, and that at least one member of the state body be physically present at the location specified in the notice of the meeting.

This bill would enact an additional, alternative set of provisions under which a state body may hold a meeting by teleconference. The bill would require at least one member of the state body to be physically present at each teleconference location, defined for these purposes as a physical location that is accessible to the public and from which members of the public may participate in the meeting. The bill would, under specified circumstances, authorize a member of the state body to participate from a remote location, which would not be required to be accessible to the public and which the bill would prohibit the notice and agenda from disclosing. Specifically, the bill would authorize a member's remote participation if the other members who are physically present at the same teleconference location constitute a majority of the state body. The bill would also authorize a member's remote participation if the member has a need related to a disability and notifies the state body, as specified. Under the bill, that member would be counted toward the majority of members required to be physically present at the same teleconference location. The bill would require a member who participates from a remote location to disclose whether any other individuals 18 years of age or older are present in the room at the remote location with the member and the general nature of the member's relationship with those individuals.

This bill would require the members of the state body to visibly appear on camera during the open portion of a meeting that is publicly accessible via the internet or other online platform unless the appearance would be

technologically impracticable, as specified. The bill would require a member who does not appear on camera due to challenges with internet connectivity to announce the reason for their nonappearance when they turn off their camera.

This bill would also require the state body to provide a means by which the public may remotely hear audio of the meeting, remotely observe the meeting, remotely address the body, or attend the meeting by providing on the posted agenda a teleconference telephone number, an internet website or other online platform, and a physical address for each teleconference location. The bill would require the telephonic or online means provided to the public to access the meeting to be equivalent to the telephonic or online means provided to a member of the state body participating remotely. The bill would require any notice required by the act to specify the applicable teleconference telephone number, internet website or other online platform, and physical address of each teleconference location, as well as any other information indicating how the public can access the meeting remotely and in person. If the state body allows members of the public to observe and address the meeting telephonically or otherwise electronically, the bill would require the state body to implement and advertise, as prescribed, a procedure for receiving and swiftly resolving requests for reasonable modification or accommodation from individuals with disabilities, as specified. The bill would impose requirements consistent with the above-described existing law provisions, including a requirement that the agenda provide an opportunity for members of the public to address the state body directly, as specified. The bill would entitle members of the public to exercise their right to directly address the state body during the teleconferenced meeting without being required to submit public comments before the meeting or in writing.

This bill would provide that it does not affect prescribed existing notice and agenda requirements and would require the state body to post an agenda on its internet website and, on the day of the meeting, at each teleconference location designated in the notice of the meeting.

This bill would require the state body, upon discovering that a means of remote participation required by the bill has failed during the meeting and cannot be restored, to end or adjourn the meeting in accordance with prescribed adjournment and notice provisions, including information about reconvening.

Existing law authorizes a multimember state advisory body to hold an open meeting by teleconference pursuant to an alternative set of provisions that are in addition to the above-described provisions generally applicable to state bodies. Under those alternative provisions, a quorum of the members of the state advisory body must be in attendance at the primary physical meeting location, as specified, and all decisions taken during the meeting must be by rollcall vote.

This bill would remove the rollcall vote requirement and the requirement for a quorum in attendance at the primary physical meeting location. The bill, instead, would require at least one staff member of the state body to be present at the primary physical meeting location. The bill would require the members of the state body to visibly appear on camera during the open portion of a meeting that is publicly accessible via the internet or other online platform unless the appearance would be technologically impracticable, as specified. The bill would require a member who does not appear on camera due to challenges with internet connectivity to announce the reason for their nonappearance when they turn off their camera.

This bill would repeal the above-described provisions on January 1, 2026.

Existing law prohibits requiring a person, as a condition of attendance at a meeting of a state body, to register their name, to provide other information, to complete a questionnaire, or otherwise to fulfill any condition precedent to their attendance. Existing law requires an attendance list, register, questionnaire, or other similar document posted at or near the entrance to the room where the meeting is to be held, or circulated to persons present during

the meeting, to state clearly that the signing, registering, or completion of the document is voluntary, and that all persons may attend the meeting regardless of whether a person signs, registers, or completes the document.

This bill would exempt from those provisions an internet website or other online platform that may require the submission of information to log into a teleconferenced meeting. The bill would permit a person to submit a pseudonym or other anonymous information when using the internet website or other online platform to attend the meeting.

Existing constitutional provisions require that a statute that limits the right of access to the meetings of public bodies or the writings of public officials and agencies be adopted with findings demonstrating the interest protected by the limitation and the need for protecting that interest.

This bill would make legislative findings to that effect.

The people of the State of California do enact as follows:

SECTION 1. Section 11123.2 is added to the Government Code, to read:

<< CA GOVT § 11123.2 >>

11123.2. (a) For purposes of this section, the following definitions apply:

(1) “Teleconference” means a meeting of a state body, the members of which are at different locations, connected by electronic means, through either audio or both audio and video.

(2) “Teleconference location” means a physical location that is accessible to the public and from which members of the public may participate in the meeting.

(3) “Remote location” means a location from which a member of a state body participates in a meeting other than a teleconference location.

(4) “Participate remotely” means participation by a member of the body in a meeting at a remote location other than a teleconference location designated in the notice of the meeting.

(b)(1) In addition to the authorization to hold a meeting by teleconference pursuant to subdivision (b) of Section 11123 and Section 11123.5, a state body may hold an open or closed meeting by teleconference as described in this section, provided the meeting complies with all of this section's requirements and, except as set forth in this section, it also complies with all other applicable requirements of this article relating to the specific type of meeting.

(2) This section does not limit or affect the ability of a state body to hold a teleconference meeting under another provision of this article, including Sections 11123 and 11123.5.

(c) The portion of the teleconferenced meeting that is required to be open to the public shall be visible and audible to the public at each teleconference location.

(d)(1) The state body shall provide a means by which the public may remotely hear audio of the meeting, remotely observe the meeting, remotely address the body, or attend the meeting by providing on the posted agenda a teleconference telephone number, an internet website or other online platform, and a physical address for each teleconference location. The telephonic

or online means provided to the public to access the meeting shall be equivalent to the telephonic or online means provided to a member of the state body participating remotely.

(2) The applicable teleconference telephone number, internet website or other online platform, and physical address of each teleconference location, as well as any other information indicating how the public can access the meeting remotely and in person, shall be specified in any notice required by this article.

(3) If the state body allows members of the public to observe and address the meeting telephonically or otherwise electronically, the state body shall do both of the following:

(A) Implement a procedure for receiving and swiftly resolving requests for reasonable modification or accommodation from individuals with disabilities, consistent with the federal Americans with Disabilities Act of 1990 (42 U.S.C. Sec. 12101 et seq.), and resolving any doubt whatsoever in favor of accessibility.

(B) Advertise that procedure each time notice is given of the means by which members of the public may observe the meeting and offer public comment.

(e) This section does not prohibit a state body from providing members of the public with additional locations from which the public may observe or address the state body by electronic means, through either audio or both audio and video.

(f)(1) The agenda shall provide an opportunity for members of the public to address the state body directly pursuant to Section 11125.7.

(2) Members of the public shall be entitled to exercise their right to directly address the state body during the teleconferenced meeting without being required to submit public comments before the meeting or in writing.

(g) The state body shall post the agenda on its internet website and, on the day of the meeting, at each teleconference location.

(h) This section does not affect the requirement prescribed by this article that the state body post an agenda of a meeting in accordance with the applicable notice requirements of this article, including Section 11125, requiring the state body to post an agenda of a meeting at least 10 days in advance of the meeting, Section 11125.4, applicable to special meetings, and Sections 11125.5 and 11125.6, applicable to emergency meetings.

(i) At least one member of the state body shall be physically present at each teleconference location.

(j)(1) Except as provided in paragraph (2), a majority of the members of the state body shall be physically present at the same teleconference location. Additional members of the state body in excess of a majority of the members may attend and participate in the meeting from a remote location. A remote location is not required to be accessible to the public. The notice and agenda shall not disclose information regarding a remote location.

(2) A member attending and participating from a remote location may count toward the majority required to hold a teleconference if both of the following conditions are met:

(A) The member has a need related to a physical or mental disability, as those terms are defined in Sections 12926 and 12926.1, that is not otherwise reasonably accommodated pursuant to the federal Americans with Disability Act of 1990 (42 U.S.C. Sec. 12101 et seq.).

(B) The member notifies the state body at the earliest opportunity possible, including at the start of a meeting, of their need to participate remotely, including providing a general description of the circumstances relating to their need to participate remotely at the given meeting.

(3) If a member notifies the body of the member's need to attend and participate remotely pursuant to paragraph (2), the body shall take action to approve the exception and shall request a general description of the circumstances relating to the member's need to participate remotely at the meeting, for each meeting in which the member seeks to participate remotely. The body shall not require the member to provide a general description that exceeds 20 words or to disclose any medical diagnosis or disability, or any personal medical information that is already exempt under existing law, such as the Confidentiality of Medical Information Act (Part 2.6 (commencing with Section 56) of Division 1 of the Civil Code).

(4) If a member of the state body attends the meeting by teleconference from a remote location, the member shall disclose whether any other individuals 18 years of age or older are present in the room at the remote location with the member, and the general nature of the member's relationship with any such individuals.

(k)(1) Except as provided in paragraph (2), the members of the state body shall visibly appear on camera during the open portion of a meeting that is publicly accessible via the internet or other online platform.

(2) The visual appearance of a member of the state body on camera may cease only when the appearance would be technologically impracticable, including, but not limited to, when the member experiences a lack of reliable broadband or internet connectivity that would be remedied by joining without video, or when the visual display of meeting materials, information, or speakers on the internet or other online platform requires the visual appearance of a member of a state body on camera to cease.

(3) If a member of the state body does not appear on camera due to challenges with internet connectivity, the member shall announce the reason for their nonappearance when they turn off their camera.

(l) All votes taken during the teleconferenced meeting shall be by rollcall.

(m) The state body shall publicly report any action taken and the vote or abstention on that action of each member present for the action.

(n) The portion of the teleconferenced meeting that is closed to the public shall not include the consideration of any agenda item being heard pursuant to Section 11125.5.

(o) Upon discovering that a means of remote public access and participation required by subdivision (d) has failed during a meeting and cannot be restored, the state body shall end or adjourn the meeting in accordance with Section 11128.5. In addition to any other requirements that may apply, the state body shall provide notice of the meeting's end or adjournment on the state body's internet website and by email to any person who has requested notice of meetings of the state body by email under this article. If the meeting will be adjourned and reconvened on the same day, further notice shall be provided by an automated message on a telephone line posted on the state body's agenda, internet website, or by a similar means, that will communicate when the state body intends to reconvene the meeting and how a member of the public may hear audio of the meeting or observe the meeting.

(p) This section shall remain in effect only until January 1, 2026, and as of that date is repealed.

SEC. 2. Section 11123.5 of the Government Code is amended to read:

<< CA GOVT § 11123.5 >>

11123.5. (a) For purposes of this section, the following definitions apply:

(1) “Participate remotely” means participation in a meeting at a location other than the physical location designated in the agenda of the meeting.

(2) “Remote location” means a location other than the primary physical location designated in the agenda of a meeting.

(3) “Teleconference” has the same meaning as in Section 11123.

(b) In addition to the authorization to hold a meeting by teleconference pursuant to subdivision (b) of Section 11123 or Section 11123.2, any state body that is an advisory board, advisory commission, advisory committee, advisory subcommittee, or similar multimember advisory body may hold an open meeting by teleconference as described in this section, provided the meeting complies with all of the section's requirements and, except as set forth in this section, it also complies with all other applicable requirements of this article.

(c) A member of a state body as described in subdivision (b) who participates in a teleconference meeting from a remote location subject to this section's requirements shall be listed in the minutes of the meeting.

(d) The state body shall provide notice to the public at least 24 hours before the meeting that identifies any member who will participate remotely by posting the notice on its *** internet website and by emailing notice to any person who has requested notice of meetings of the state body under this article. The location of a member of a state body who will participate remotely is not required to be disclosed in the public notice or email and need not be accessible to the public. The notice of the meeting shall also identify the primary physical meeting location designated pursuant to subdivision (f).

(e) This section does not affect the requirement prescribed by this article that the state body post an agenda of a meeting at least 10 days in advance of the meeting. The agenda shall include information regarding the physical meeting location designated pursuant to subdivision (f), but is not required to disclose information regarding any remote location.

(f) A state body described in subdivision (b) shall designate the primary physical meeting location in the notice of the meeting where members of the public may physically attend the meeting, observe and hear the meeting, and participate. *** At least one staff member of the state body shall be *** present at the primary physical meeting location *** during the meeting-***. The state body shall post the agenda at the primary physical meeting location, but need not post the agenda at a remote location.

(g) When a member of a state body described in subdivision (b) participates remotely in a meeting subject to this section's requirements, the state body shall provide a means by which the public may remotely hear audio of the meeting or remotely observe the meeting, including, if available, equal access equivalent to members of the state body participating remotely. The applicable teleconference phone number or *** internet website, or other information indicating how the public can access the meeting remotely, shall be in the 24-hour notice described in subdivision (b) that is available to the public.

(h)(1) Except as provided in paragraph (2), the members of the state body shall visibly appear on camera during the open portion of a meeting that is publicly accessible via the internet or other online platform.

(2) The visual appearance of a member of a state body on camera may cease only when the appearance would be technologically impracticable, including, but not limited to, when the member experiences a lack of reliable broadband or internet connectivity that would be remedied by joining without video, or when the visual display of meeting materials,

information, or speakers on the internet or other online platform requires the visual appearance of a member of a state body on camera to cease.

(3) If a member of the body does not appear on camera due to challenges with internet connectivity, the member shall announce the reason for their nonappearance when they turn off their camera.

(i) Upon discovering that a means of remote access required by subdivision (g) has failed during a meeting, the state body described in subdivision (b) shall end or adjourn the meeting in accordance with Section 11128.5. In addition to any other requirements that may apply, the state body shall provide notice of the meeting's end or adjournment on its ~~***~~ **internet website** and by email to any person who has requested notice of meetings of the state body under this article. If the meeting will be adjourned and reconvened on the same day, further notice shall be provided by an automated message on a telephone line posted on the state body's agenda, or by a similar means, that will communicate when the state body intends to reconvene the meeting and how a member of the public may hear audio of the meeting or observe the meeting.

~~***~~

(j) This section does not limit or affect the ability of a state body to hold a teleconference meeting under another provision of this article.

(k) This section shall remain in effect only until January 1, 2026, and as of that date is repealed.

SEC. 3. Section 11123.5 is added to the Government Code, to read:

<< CA GOVT § 11123.5 >>

11123.5. (a) In addition to the authorization to hold a meeting by teleconference pursuant to subdivision (b) of Section 11123, any state body that is an advisory board, advisory commission, advisory committee, advisory subcommittee, or similar multimember advisory body may hold an open meeting by teleconference as described in this section, provided the meeting complies with all of the section's requirements and, except as set forth in this section, it also complies with all other applicable requirements of this article.

(b) A member of a state body as described in subdivision (a) who participates in a teleconference meeting from a remote location subject to this section's requirements shall be listed in the minutes of the meeting.

(c) The state body shall provide notice to the public at least 24 hours before the meeting that identifies any member who will participate remotely by posting the notice on its internet website and by emailing notice to any person who has requested notice of meetings of the state body under this article. The location of a member of a state body who will participate remotely is not required to be disclosed in the public notice or email and need not be accessible to the public. The notice of the meeting shall also identify the primary physical meeting location designated pursuant to subdivision (e).

(d) This section does not affect the requirement prescribed by this article that the state body post an agenda of a meeting at least 10 days in advance of the meeting. The agenda shall include information regarding the physical meeting location designated pursuant to subdivision (e), but is not required to disclose information regarding any remote location.

(e) A state body described in subdivision (a) shall designate the primary physical meeting location in the notice of the meeting where members of the public may physically attend the meeting and participate. A quorum of the members of the state body shall be in attendance at the primary physical meeting location, and members of the state body participating remotely shall not count towards establishing a quorum. All decisions taken during a meeting by teleconference shall be by rollcall vote. The state body shall post the agenda at the primary physical meeting location, but need not post the agenda at a remote location.

(f) When a member of a state body described in subdivision (a) participates remotely in a meeting subject to this section's requirements, the state body shall provide a means by which the public may remotely hear audio of the meeting or remotely observe the meeting, including, if available, equal access equivalent to members of the state body participating remotely. The applicable teleconference phone number or internet website, or other information indicating how the public can access the meeting remotely, shall be in the 24-hour notice described in subdivision (a) that is available to the public.

(g) Upon discovering that a means of remote access required by subdivision (f) has failed during a meeting, the state body described in subdivision (a) shall end or adjourn the meeting in accordance with Section 11128.5. In addition to any other requirements that may apply, the state body shall provide notice of the meeting's end or adjournment on its internet website and by email to any person who has requested notice of meetings of the state body under this article. If the meeting will be adjourned and reconvened on the same day, further notice shall be provided by an automated message on a telephone line posted on the state body's agenda, or by a similar means, that will communicate when the state body intends to reconvene the meeting and how a member of the public may hear audio of the meeting or observe the meeting.

(h) For purposes of this section:

(1) "Participate remotely" means participation in a meeting at a location other than the physical location designated in the agenda of the meeting.

(2) "Remote location" means a location other than the primary physical location designated in the agenda of a meeting.

(3) "Teleconference" has the same meaning as in Section 11123.

(i) This section does not limit or affect the ability of a state body to hold a teleconference meeting under another provision of this article.

(j) This section shall become operative on January 1, 2026.

SEC. 4. Section 11124 of the Government Code is amended to read:

<< CA GOVT § 11124 >>

11124. (a) No person shall be required, as a condition to attendance at a meeting of a state body, to register ~~***~~ **their** name, to provide other information, to complete a questionnaire, or otherwise to fulfill any condition precedent to ~~***~~ **their** attendance.

(b) If an attendance list, register, questionnaire, or other similar document is posted at or near the entrance to the room where the meeting is to be held, or is circulated to persons present during the meeting, it shall state clearly that the signing, registering, or completion of the document is voluntary, and that all persons may attend the meeting regardless of whether a person signs, registers, or completes the document.

(c) This section does not apply to an internet website or other online platform that may require the submission of information to log into a teleconferenced meeting, provided, however, that a person required to submit such information shall be permitted to submit a pseudonym or other anonymous information when using the internet website or other online platform to attend the meeting.

SEC. 5. The Legislature finds and declares that Sections 1, 2, 3, and 4 of this act, which add and repeal Section 11123.2 of, amend, repeal, and add Section 11123.5 of, and amend Section 11124 of, the Government Code, impose a limitation on the

public's right of access to the meetings of public bodies or the writings of public officials and agencies within the meaning of Section 3 of Article I of the California Constitution. Pursuant to that constitutional provision, the Legislature makes the following findings to demonstrate the interest protected by this limitation and the need for protecting that interest:

(a) By removing the requirement for agendas to be placed at the location of each public official participating in a public meeting remotely, including from the member's private home or hotel room, this act protects the personal, private information of public officials and their families while preserving the public's right to access information concerning the conduct of the people's business.

(b) During the COVID-19 public health emergency, audio and video teleconference were widely used to conduct public meetings in lieu of physical location meetings, and those public meetings have been productive, increased public participation by all members of the public regardless of their location and ability to travel to physical meeting locations, increased the pool of people who are able to serve on these bodies, protected the health and safety of civil servants and the public, and have reduced travel costs incurred by members of state bodies and reduced work hours spent traveling to and from meetings.

(c) Conducting audio and video teleconference meetings enhances public participation and the public's right of access to meetings of the public bodies by improving access for individuals who often face barriers to physical attendance.

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Attachment #2
Budget

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CalABLE Budget 2023-24

Legislative Loans Status					
Loan Information	Loan Authority	Amount Transferred	Transfer Date	Interest Rate	Repayment Due
SB 826 - Budget Act of 2016	\$850,000				6/30/2025
AB 97 - Budget Act of 2017	\$650,000				6/30/2025
SB840- Budget Act of 2018	\$1,750,000				6/30/2025
AB 74 - Budget Act of 2019	\$1,070,000				6/30/2025
SB 74 - Budget Act of 2020	\$500,000				6/30/2025
Total	\$4,820,000				

Staff Expenditures			
Description	Projected Expenditures	Y-T-D Actual Expenditures	% Spent
Personal Salaries and Wages	\$420,000	\$129,209	31%
Personnel Benefits	\$216,000	\$65,854	30%
Total Staff Expenditures	\$636,000	\$195,063	31%

Operating Equipment and Expenses			
Description	Projected Expenditures	Y-T-D Actual Expenditures	% Spent
In-State Travel	\$4,000	\$5,736	143%
Out-of-State Travel	\$0.0	\$363	
Contracts	\$649,000	\$63,086	10%
Administrative Expenses	\$151,000	\$9,511	6%
Total OE&E Expenditures	\$804,000	\$78,696	10%

Total Program Expenditures				
General Fund Appropriation	Current Year Staff Expenditures	Current Year OE&E Expenditures	Total Expenditures 6/30/23	Appropriation Balance 5/31/23
\$1,440,000	\$195,063	\$78,696	\$273,759	\$1,166,241
Encumbrances			\$437,938	\$1,002,062

External Contracts (Thru 12/5/23)					
Vendor	Term	Contract Total	Total Contract Expenditures	Remaining	% Spent
AKF Consulting Group 529A Program Consulting Services	12/1/21-11/30/24	\$400,619	\$252,490	\$148,129	63.03%
Meketa Investment Group, Inc 529A Investment Consulting Services	4/1/22-3/30/24	\$160,000	\$63,413	\$96,588	39.63%
Program 11, LLC Marketing Services	7/1/21-6/30/24	\$827,208	\$635,781	\$191,427	76.86%
Vestwell State Savings, LLC 529A Program Plan Manager	2/1/23-9/1/27	\$500,000	\$0	\$0.00	0%
eCaptions Captioning Services	9/1/23-8/30/25	\$14,000	\$660	\$13,340	4.71%
Eaton Interpreting Services, Inc. ASL Interpreting Services	7/1/22-6/30/24	\$14,000	\$5,071	\$8,930	36.22%
Lazar Spanish Translation Services	7/1/22-6/30/24	\$14,000	\$1,000	\$13,000	7.14%
Total		\$2,009,827	\$958,414	\$551,413	47.69%

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Attachment #3
CaIABLE Roadshow Schedule

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CalABLE Roadshow Schedule

Outreach Events Fourth Quarter 2023

Date	Event	Attendees	Webinar	Sponsorship
9/19/2023	SSA- Auburn	6		
9/21/2023	DOR Training- San Francisco	12		
9/21/2023	DOR Training- San Jose	20		
9/21/2023	Foundithub.org- In-Person Suisun City	20		
9/26/2023	SSA- Stockton	36		
9/26/2023	Financial Health Equity In-Person San Francisco	20		
9/27/2023	Application Webinar		355	
9/28/2023	DOR Training- Santa Barbara	30		
9/30/2023	San Diego Deaf Festival	200		
9/30/2023	Padres Especiales Unidos- Spanish Educational Conference	200		
10/3/2023	SSA- Northern CA	35		
10/4/2023	Jobtoberfest- In-Person San Diego			1,500
10/4/2023	Kern Regional Center In-Person Bakersfield	30		
10/4/2023	Kern Regional Center In-Person Bakersfield Spanish	1		
10/5/2023	DOR Training- San Diego			
10/5/2023	DOR Training- Van Nuys/ Foothill			
10/5/2023	Family Center/Centro de Familias Excepcionales In-Person Bakersfield	16		
10/5/2023	Legal Aid Society of San Diego In-Person	30		
10/5/2023	Deaf Community Services of San Diego In-Person	15		
10/5/2023	Beacons Inc In-Person- Carlsbad (Partner Toolkit Request)	20		
10/6/2023	SSA office in San Diego	20		
10/6/2023	Special Education Conference- In Person- Garden Grove			1,000
10/7/2023	Legal Aid Society of San Diego Gala In-Person			500
10/10/2023	Frank D. Lanterman - Spanish	14		
10/12/2023	Seesaw Communities In-Person Fullerton	70		
10/12/2023	5th Annual NDEAM Awareness Event- In-Person Sacramento			100
10/12/2023	DOR Training- Greater East Bay	25		
10/12/2023	DOR Training- Blind Field Services	15		
10/18/2023	Tri-County GLAD	23		
10/18/2023	Regional Center of Orange County	110		
10/19/2023	DOR Training- Orange/San Gabriel	50		
10/19/2023	DOR Training- LA South Bay	30		
10/19/2023	Self-Advocacy	2		

10/19/2023	National Transfer Week- CSU Fullerton- Gloria Tabling			500
10/21/2023	Strides for DisABILITY 5K & 3K In-Person Long Beach			1000
10/21/2023	FERIA-Partnership Parent Conference In-Person Chula Vista	200		200
10/23/2023	HireABLE	28		
10/23/2023	Financial Planners Panel In-Person Santa Clara Dante	35		
10/25/2023	WEBINAR- QDE		750	
10/26/2023	SSA- Sacramento	30		
10/26/2023	DOR Training- Redwood Empire	19		
10.26-27/2023	Supported Life Conference	40		200
10/28/2023	MIND Institute, Sacramento CA In-Person (Spanish)	70		60
10/31/2023	SSA- Merced	25		
11/4/2023	Adaptive Sports Festival In-Person Pasadena			818
11/4/2023	Fall Games NC Special Olympics In-Person Sacramento	50		
11/6/2023	Department of Counselor Education and Rehabilitation- CSUF	25		
11/7/2023	Department of Counselor Education and Rehabilitation- CSUF	15		
11/7/2023	Housing Choices Watsonville, CA	30		
11/7/2023	Center for Excellence in Developmental Disabilities- Padres para Padres Spanish	21		
11/9/2023	Adult Transition Program Parent & Teacher In-Person	45		
11/11/2023	Fall Games SC Special Olympics In-Person Fountain Valley			300
11/15/2023	WEBINAR- Maximizing your CalABLE Account		528	
11/16/2023	San Mateo Co. Commission on Disabilities	20		
11/17/2023	Triumph Presentation	19		
11/17/2023	San Andreas Regional Center	45		
11/17/2023	Managed Career Solutions, Inc.	19		
11/28/2023	SSA- Lodi	15		
11/28/2023	Imperial Valley Regional Occupational Program - WorkAbility			
11/30/2023	Congreso Familiar- Spanish	33		
12/1/2023	Disability Resources Agency for Independent Living (DRAIL)	15		
12/2/2023	MaraFunRun 5K - William Land Park	900		
12/11/2023	State Council, North State SCDD			
Q4 Total		2,833	1,633	7,229

Future Outreach Events First Quarter 2024

Date	Event
1/10/2024	CalABLE Basics Webinar
1/18/2024	North LA County Regional Center – CalABLE 1 st Presentation
1/19/2024	Charles Leroy Lowman Special Ed & Career Transition Center - Presentation
1/20/2024	Abilities Fair in SF Valley
1/24/2024	North LA County Regional Center – CalABLE 2 nd Presentation
1/25/2024	Compass Supportive Living Services for Adults - Presentation
1/26/2024	Tools for the Journey – CalABLE Exhibitor
2/2/2024	Deaf and Hard of Hearing Service Center – Presentation
2/2/2024	Northern California Neurodiversity & Disability Symposium
2/14/2024	CalABLE Taxes Webinar
2/21/2024	Grupo Mariposas – Butterflies Parent Support Group – Spanish Presentation
2/21/2024	North LA County Regional Center – CalABLE 2 nd Presentation
2/22/2024	Sonoma County Transition Fair Booth
2/26/2024	Westside Family Resource and Empowerment Center - Presentation
2/28/2024	Disability Rights California (DRC) Gala - Sacramento