
OCTOBER 1, 2024

**AGENDA ITEM 3
INFORMATION ITEM**

CALIFORNIA ABLE ACT BOARD

Strategic Plan

Background

CalABLE is in the process of developing a 5-year strategic plan with the assistance of AKF Consulting. The strategic plan will include background, mission, vision, values, objectives, and measurements for the objectives.

The 5-year plan will guide CalABLE's efforts beginning in 2025 until 2030.

This information item will include drafts for CalABLE's:

- Mission Statement
- Vision Statement
- Values

Presenter

Thomas Martin, Executive Director, California ABLE Act Board

Attachments

- Attachment #1 – CalABLE's Draft Mission, Vision, and Values

This page is intentionally left blank.

CaIABLE Strategic Plan

Draft Mission, Vision, and Values Statements

Vision Statement

An equitable world where all people with disabilities can pursue their dreams.

Mission Statement

To be a trusted financial partner of the disability community, offering a user-friendly way to save and spend money for a better future.

Values

- Core Disability Values
 - We stand against the social, financial, and systemic inequities that exist for people with disabilities.
 - Disability services should seek to maximize self-determination and independence.
 - People with disabilities deserve equitable access to financial services and wealth-building opportunities.
 - We use inclusive language that promotes dignity and empathy and respects individual preferences.
- Core Program Values
 - We seek a deep understanding of our participants and are responsive to their needs.
 - We reach out to underserved and unreached populations.
 - We regularly measure, assess, and improve the Program.
 - We pursue diversity, equity, and inclusion.
 - We engage the public with transparency and hospitality.
 - We foster open collaboration and fruitful discussion between staff, Board members, and stakeholders.
 - We prioritize plain language that is simple and approachable.
 - We use accessible technology and materials.

This page is intentionally left blank.