



# CALABLE ACT BOARD

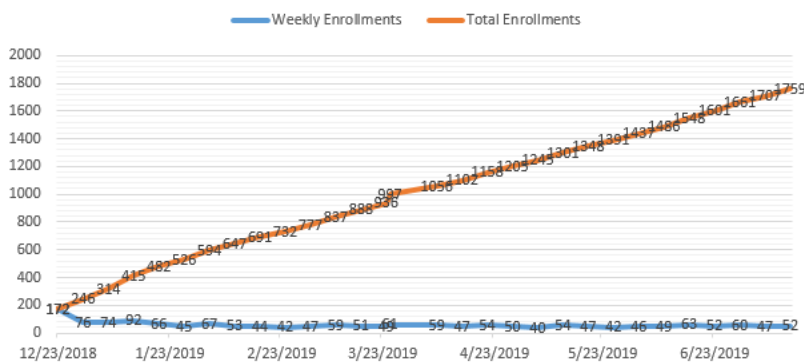
Monthly Update

June/July | 2019 |

## Accounts / Assets

As of July 15, 2019, total enrollments in CalABLE reached 1,759 accounts opened, with over \$6,111,678 million in assets under management. Since May 28, 2019 CalABLE has seen an increase in 368 accounts and \$1,425,245.18 in assets.

Total Accounts



## Operations

- **Program commitment to accuracy and technical advice**—The CalABLE program has entered into a new phase of operations in which a large volume of the contact we receive from stakeholders are now focused upon best use cases for CalABLE accounts and technical advice for those who may be experiencing unexpected interruptions or inconsistent treatment related to their government benefits. While staff has always acknowledged that our expertise on specific benefits eligibility is limited, we have taken great lengths to be a reliable and trusted resource for current and potential ABLE account holders.

In June, each board member was sent an email message from a concerned stakeholder who questioned the program’s commitment to accuracy while raising concerns regarding information that was presented on the CalABLE website. The raising of these concerns led to our own internal review of our education and training practices, as well as our content publishing processes. I have included steps that we have already taken, as well as plans currently underway to improve our practices.

- We reached out directly (STO Executive Office and CalABLE Staff) to the individual who shared her complaint in order to gain additional information as to the nature of her concerns. The Executive Office has attempted to reach out to the individual twice by phone with an additional email as follow up. As of 7/14/19, the individual has yet to respond to the Executive Office, and has also indicated that she was not interested in working directly with CalABLE staff.

- We removed the two videos that the emailer listed as problematic. Without direct information on what were the specific elements she felt were inaccurate, we elected to remove two older videos that were no longer being promoted.
- We ensure that CalABLE staffers and contractors are trained and/or maintain internal expertise on issues related to the populations we serve, the intersection of the ways in which CalABLE impacts benefits programs. Last year representatives from CalABLE Staff, AKF, and TIAA all attended a two day training session that focused disability etiquette, understanding the basics of benefits, and a deep dive into the inner workings of ABLE. New staff will go through a similar training as well.
- We actively engage with our ABLE peers in other states both individually as needs arise, and collectively through organizations like NAST and Strategic Insight.
- We tap into external resources available to CalABLE through our State Agency and Community based Advocacy Groups and Services Providers, and our still in development CalABLE Ambassador Program. These individuals provide limited technical advice.
- We utilize a multi-tiered review process to ensure that content is reviewed by no fewer than three sources before it is ever published for public consumption.
- We have begun a process of including source references whenever responding to technical questions from stakeholders. This sharing of source information is intended to show that when providing information to stakeholders, we are utilizing the same sources as the providers themselves.
- We partner with national community based organizations to tap into their resources related to benefits. Partner organizations include the National Disability Institute, Los Angeles Department of Disability and the World Institute on Disability.
- We are expanding our network of technical advisors by making new direct contacts within SSA, HUD, and other benefits providers that will allow us to tap into their expertise as we work with our stakeholders.
- We are also exploring a potential contracted services agreement for a technical advisory consultant who can serve as a reviewer for our content development, and provide direct technical advice to current and potential CalABLE account holders.
- **SSM1 Recruitment**—CalABLE staff is near completion of a new hire to fill the vacancy that was created by Carrie Fisher-Stone’s departure. We have identified very well qualified finalists for the position anticipate making an offer by 7/26. Our hope is that the new hire will be on board by mid-August.
- **CalABLE Visa Prepaid Card**—Two weeks ago, I shared an announcement of the decision to delay the launch of the CalABLE Visa Prepaid due to website accessibility issues uncovered during our testing of the card functionality. Since our last communication, the card vendor has begun the remediation process for the issues identified and by all accounts appear to be on track for our new mid-September launch date. If things continue (as expected) to move quickly, there is a possibility the launch date could move up into August.
- **Strategic Planning RFP**—CalABLE staff is planning to introduce a request for proposals (RFP) for a Strategic Planning Facilitator in order to assist the team in developing an updated Strategic Plan that would focus activity over the next five years of the program, and provide information and data to support long-term funding mechanisms for the program. This will be a short-term (six months) contract that will include key stakeholder interviews, facilitation of strategic planning group meetings, and development of a formal plan to submit to the board.

## Outreach

CalABLE staff are actively engaging in informational discussions regarding program enrollment. Here is a snapshot of our activity and reach since the previous board update:

- Approximately 229 prospective account holders, family members, service providers and disability advocates attended CalABLE presentations offered throughout Sacramento, Los Angeles, Bakersfield, Chico, and Redding.
- CalABLE gained 94 followers/subscribers to its social media platforms and email listserv.

- CalABLE staff met in person with Wanda Gonzalez, Public Affairs Specialist for SSA. She covers 26 SSA offices throughout Northern California. Staff discussed future education opportunities and mutual partnership for the benefit of CalABLE account owners and beneficiaries.
- Ambassador Program Update - Staff is working on the draft of the application. We have 70 people who have expressed interest in becoming an Ambassador.

#### *Upcoming events and presentations*

- **July 29 at 6:00 p.m.** - Dante Allen will present CalABLE to the Filipino Association for Developmental Disabilities at the San Diego Regional Center
- **Aug 1 at 1:00 p.m.** – Dante to present at FREED in Grass Valley, CA
- **Aug 3** – Dante to present at Congreso Familiar at Chabot College in Hayward, CA.
- **Aug 22 at 8:30 a.m. to 4:15 p.m.** – Dante to present at Alta Regional Center
- **Sept 13 at 10:45 a.m.** - CalABLE staff to present at CalEPA headquarters for the Association of California State Employees with Disabilities.

### Legislative Updates

[AB 736](#) (Irwin) Taxation: Savings Plans: Qualified ABLE Program Would, for taxable years beginning on or after January 1, 2019, and before January 1, 2026, would conform to those changes made by the Tax Cuts and Jobs Act with respect to rollovers to ABLE accounts from a qualified tuition program account. This bill was held in committee and will not pass in this current legislative session.

[S. 817](#) (Casey, Moran, and Roberts) and [H.R. 1814](#) (Cardenas) are the Senate and House versions of the ABLE Age Adjustment Act. These bills would amend the Internal Revenue Code, with respect to qualified ABLE programs, to increase the age threshold for eligibility for such programs from 26 to 46. Advocates should reach out to each of their two U.S. Senators and their member of the U.S. House of Representatives and urge them to co-sponsor the ABLE Age Adjustment Act, S. 651 in the Senate, and H.R. 1814 in the House. Members of Congress need to hear that it is imperative that the legislation be enacted immediately both to bolster the national viability of state ABLE programs and to dramatically expand the reach and benefit of ABLE accounts. This bill will likely be added as a trailer to other legislation and be positioned to be voted up or down in the fall.

### Next CalABLE Act Board Meeting

The September 24, 2019 meeting has been changed to October 2, 2019, 2019| 1:30 p.m. |915 Capitol Mall Room 587. This meeting was changed to accommodate my travel schedule on behalf of CalABLE to attend and present at Strategic Insight's 529 Conference: *Uncovering the most effective strategies for 529 growth*. Thank you for your responses to the inquiry that was sent out to get the best time for this new date.

#### Proposed Agenda Items

- Q2 Operations Report
- Marketing Plan and Creative
- ABLE Industry Update

*This report is produced by CalABLE staff as an informational update for the California Achieving a Better Life Experience Act Board. It is intended to provide snapshot updates on informational items and is distributed in months in which no CalABLE Board Meeting occurs. If you have questions or concerns about this report, or any other issues related to CalABLE, please contact CalABLE Executive Director, Dante Allen at (916) 653-4046, or [dante.allen@treasurer.ca.gov](mailto:dante.allen@treasurer.ca.gov).*