



CalABLE Workshop for Service Providers

CALIFORNIA ABLE ACT BOARD

CaIABLE Workshop for Service Providers

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Meet Your Speaker

- Christina Elliott, Executive Director



- CalABLE Team

- Carrie Fisher Stone, Deputy Executive Director
- Ruth Holton-Hodson, Senior Policy Advisor
- Raji Prasad, Program Analyst

Our Progress Report



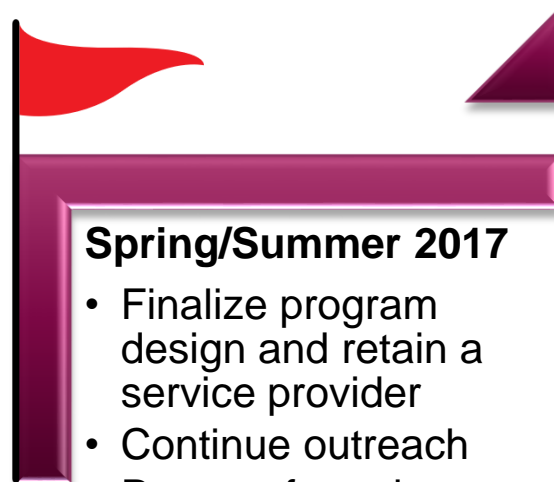
Fall 2016

- Write state regulations
- Develop internal infrastructure
- Organize advisory councils
- Engage with stakeholders



Winter 2016/17

- Finalize state regulations
- Hire consultant to help develop program



Spring/Summer 2017

- Finalize program design and retain a service provider
- Continue outreach
- Prepare for going LIVE!

Fall 2017

- CalABLE accounts go LIVE!

Next Steps

- May* 2017: Board will vote on program direction (e.g. independent operation, partnership with another State, or join ABLE Alliance)
- May 10, 2017: Host third meeting of the Public Agency Advisory Council
- May 23, 2017: Begin regular rulemaking process
- Finalize program design
- Continue outreach throughout California regions
- July* 2017: Roll out ABLE Ambassador's Program
- Prepare for Fall 2017 launch

Lessons Learned

- Nationally: Slow uptake seen in ABLE Programs
- Locally: Anticipation of CalABLE Program
 - Increase in public engagement, awareness, and number of inquiries
- Use local agencies/organizations as information, resource, and marketing avenues
- Aim for uniform interpretations of the federal and state statutes
 - Increases in undecided/unsure consumers
 - Increases in consumer-driven research
- Market sensitively and effectively to potential consumers

Marketing CalABLE

- Design creative and innovative marketing strategy
 - Digital
 - Media kits for social media
 - Print
 - Flyers and brochures
 - Word-of-mouth
 - Agency-to-agency
 - Agency-to-consumer
 - Consumer-to-consumer
- Develop brand awareness
- Identify objectives and deliverables

ABLE Ambassador Program

- Begin recruitment in July*
 - May include:
 - Formalizing strategy
 - Training prospective Ambassadors
 - Sharing of CalABLE information within social circles
 - Sharing of specific brand messages on social network sites
 - Giving feedback on marketing messages for CalABLE prior to launch
 - Giving ideas on program interface, messaging, appearance, and user-friendliness
 - Writing editorial commentary on CalABLE

Partnership with Purpose

- CalABLE has limited resources
- **GOAL:** *Form collaborative partnerships with state and local agencies, nonprofits and other organizations to maximize ABLÉ awareness and improve flow of information*
 - Learn where our goals intersect (short-term and long-term), define agency/organization roles and responsibilities, as well as identify and address potential conflicts
 - Maximize effective use of available resources (e.g., internal processes for communications)
 - Develop and implement formalized processes to share information, feedback, and queries (e.g. top-down and bottom-up, MOUs, All-County Letters)
 - Identify existing resources and relationships (e.g. networks, in-progress community projects, upcoming events and conferences)
 - Engage multiple sectors of the community

Informing Consumers

- Financial literacy, planning, and empowerment
 - Include CalABLE information in your resource referrals, intake process, or case management services
 - Educate on being informed consumers
 - Fees (program, rollover, and additional)
 - Features (e.g. debit cards, prepaid cards, and e-gifting)
 - Tax or other incentives
 - Aggregate caps (vary for each state per 529 plan)
 - Investment and FDIC insured options
 - Customer service



Discussion



- What are your ideas?
- What resources do you need from us?
- How can you help?

Connect with CalABLE

- Find us on Facebook, Twitter, and YouTube
 - <https://www.facebook.com/CalABLE/>
 - https://twitter.com/CalABLE_Board
 - <https://www.youtube.com/channel/UCk02cbbE8PCkHATlvrsTfIA>



Questions?

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