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**OCTOBER 1, 2024**

**AGENDA ITEM 3  
INFORMATION ITEM**

**CALIFORNIA ABLE ACT BOARD**

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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

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# 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.

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