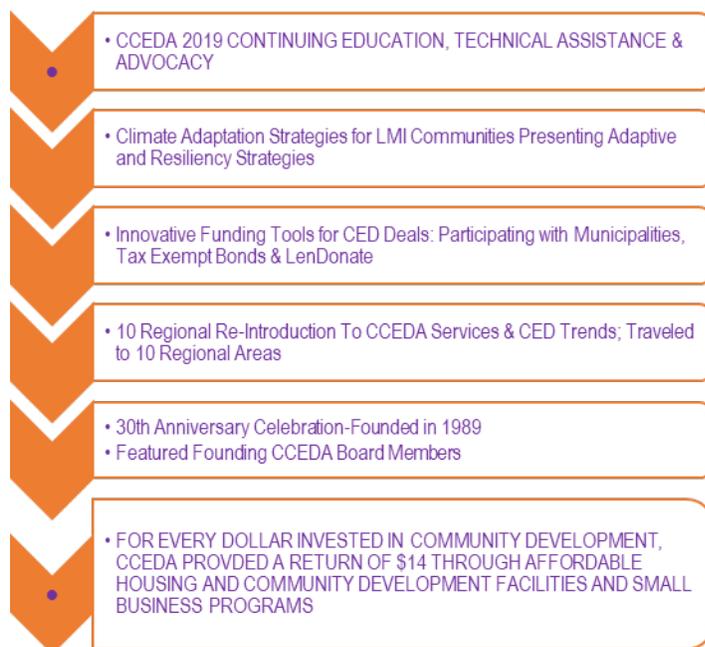


## 2019 Summary of CCEDA Outcomes and 2020 Plans

by California Community Economic Development Association



### 2019

2019 was a year of transitions. CCEDA's 20-year Executive Director retired, CCEDA's Board appointed Roberto Barragán as the Interim

Executive Director while conducting an Executive Search. Though CCEDA had a few delays in 2019, CCEDA has been operating with a renewed energy to provide qualitative services that offer measurable impact under the Interim Director, Roberto Barragán.

During the 3<sup>rd</sup> and 4<sup>th</sup> Quarter of 2019, CCEDA completed ten in-person continuing education sessions on Community Economic Development (CED) Trends to the following

community action agencies (CAAs):

- Sacramento County, inviting the counties of Napa, Yolo, and Sonoma.
- Merced County, inviting the counties of San Joaquin, Amador, Calaveras, and Madera.
- Kern County, inviting the counties of Tulare, Inyo, Kings and Fresno.
- Riverside County, inviting the counties of San Bernardino, San Diego and Imperial.
- San Luis Obispo CAA
- Long Beach CAA
- Santa Barbara CAA
- Butte CAA
- Alameda CAA
- San Diego

As a result of these CCEDA re-introduction presentations, CCEDA anticipates several CAA clients requesting brainstorming and technical assistance commitments which will be designated as carry-over clients from Q3 and Q4 2019 to 2020. Listed below are agencies that have requested follow-up services:

- a. Kings Community Action Organization relocation and purchase of a 20,000 s.f. facility to house their food bank and centralized commercial kitchen for their Head Start Programs.
- b. Sacramento, Community Resource Project, Inc., is seeking assistance to develop a CDFI and a real estate purchase.
- c. Central Valley Opportunity Center (CVOC) is seeking funding to complete its solar-panel and trucking job training center (Merced County).

- d. Community Action Partnership of Kern has requested assistance with formulating a real estate strategy, which may include affordable housing, homeless shelters and/or homeownership.
- e. Community Action Partnership of Sonoma has been working with CCEDA to identify resources to purchase their building.
- f. Long Beach CAA is seeking assistance in the purchase of a building
- g. CAA of Butte County is seeking long-term development assistance in the form of grant writing and responding to federal RFPs for eligible disaster-recovery program/project funding.

To further assist CCEDA clients, in October 2019, CCEDA released its *2019 Resource and Research Development Toolkit*, an on-line resource available through the CCEDA website ([www.cceda.com](http://www.cceda.com)) with paid \$50 membership. The toolkit offers over 180 e-links to grants for affordable housing, economic development and workforce funding, as well as crowdfunding, non-cash fundraising, grant identification resources, demographics and mapping tools, research studies and research data sources. Over 40 e-links are included to affordable housing development funding resources.

In lieu of CCEDA's Annual Teaching and Learning Conference, CCEDA hosted a 30<sup>th</sup> Anniversary Milestone Celebration to recognize the shared vision of CCEDA's Founding Board Members, including featured speakers: James Head, CEO of the East Bay Community Foundation and Jeff Merkowitz, Senior Advisor to the US Treasury, CDFI Fund Director. Robert Zdenek, author of *Navigating Community Development: Harnessing Comparative Advantages to Create Strategic Partnerships*, served as the moderator for a historical look back at the impetus to create CCEDA with Founding members, Anita Landecker, CEO of ExEd and Gordon Chin, Founder of Chinatown Community Development Corporation joining James Head on the panel.

Joined by over 60 executive directors, community investment bankers and community representatives from across the State, CCEDA was pleased to announce that for every dollar invested in community development, CCEDA provides a return of \$14 through the development of affordable housing, new community development facilities, and small business programs. During the past 15 years, CCEDA has assisted its membership in securing \$156,000,000 to acquire, build and rehab 969 affordable housing units and develop over 100,000 square feet of commercial real estate.

In 2019 CCEDA hosted and trained over 350 CED practitioners as part of CCEDA's annual regional training programs. The first training sessions were held in July in Oakland and Los Angeles on *Innovative Funding Tools for CED Projects*. The session featured subject experts in using public, private, and crowd sourcing financial tools for non-profits. Topic experts included:

- Larry Kosmont, Chairman & CEO, The Kosmont Group
- Dan Bronfman, Managing Director Tax-Exempt Nonprofit & Community Development Lending, Pacific Western Bank
- Vivienne Hsu, CEO & Founder, LENDonate.com

Speakers focused their sessions on how to form deal making collaborations with municipalities to develop CED deals and take advantage of funding that are exclusive to municipalities, but can

include funding for CED projects if participation is early, such as working with investors of Opportunity Zones and the steps to bring a deal forward and the partnerships required. For those new to commercial real estate development, information was provided on how to best work with bankers to access innovative real estate development tools, which go beyond a simple debt service or construction loan. One of the newest topics presented was to assist attendees to gain a better understanding of a unique crowdsourcing funding tool exclusive to non-profits, LendDonate.com, which can act as a bridge loan while committed but not yet released public funding or as long-term debt that can have a portion forgiven depending on the borrower and investor.

The second training session was on *Climate Adaptation Strategies for LMI Communities*, presented by Climate Resolve, California Climate Investments Program and panelists from Grid Alternatives, Emerald Cities Collaborative, Rising Sun Center for Opportunity and ICF International (SoCal REN) in both Oakland and Los Angeles.

First, Climate Resolve took a deep dive into the science of climate change and examined the implications it has with regards to the low and moderate income and disadvantaged communities. They then highlighted numerous adaptive and resiliency strategies being implemented locally at the community level with featured panel representatives from the organizations previously mentioned. Finally, the California Climate Investments program presented their various Cap and Trade programs as a funding source which can be utilized for different types of climate initiatives that both CED and non-profit affordable housing developers can utilize in re-adapting commercial properties, building new community facilities and/or affordable housing.

Audiences for both locations came from a variety of different backgrounds, bringing unique perspectives and resourceful information to the discussion. Attendees included community economic development practitioners, community action partnerships and agencies, community development corporations, community development financial institutions, private financial institutions, and climate change advocates, as well as local community members looking to make an impact when it comes to climate change or to develop affordable housing or community development facilities.

## 2020 Plans

With the appointment of Roberto Barragán as the new Executive Director for CCEDA, he has positioned the agency for growth, impact and transformation in 2020. By Year End 2019, CCEDA will have a completed study on the current state of economic development in California relating to CCEDA operations. The robust report will include an environmental scan identifying community economic development organizations in the State and current trends in community economic development, potential new directions that CCEDA could pursue to increase impact, CCEDA assets in place which could support these directions, and gaps in capacity that would require operational change.

CCEDA has three core programs, Continuing Education, Technical Assistance and Public Policy, Research and Advocacy. Under Roberto Barragán's leadership, CCEDA is adopting a

greatly enhanced and more robust level of service in each of these areas. Based upon feedback from CCEDA members, CCEDA will be focusing on providing services in the 5 following areas:

- Homelessness and Facility and Services Responses
- Funding and Resource Development for both Community Economic Development and Affordable Housing
- Climate Adaptation
- CDFI Development
- Social Enterprise Development

Recognizing that homelessness is affecting all California counties with several counties experiencing at least a 20% increase in homeless clients. CCEDA's 2020 plan includes 10 regional meetings offering both training on CED Trends as denoted below as well as topics as may be requested by the agency. Outreach and regional meetings will be targeted in the following counties in 2020, with the County Community Action Agency serving as the host to convene both other CAAs as well as community economic development agencies in the area:

- Humboldt County, inviting the surrounding counties with CAAs and CED agencies from: Del Norte, Siskiyou, Modoc, Shasta, Tehama, Mendocino, and Glenn.
- Nevada County, inviting agencies in Plumas, Butte, Yuba, and El Dorado.
- Sonoma County, inviting agencies in Napa, Yolo, and Sacramento.
- Alameda County, inviting agencies in Marin, Contra Costs, San Francisco, San Mateo and Santa Clara.
- Monterey County, inviting agencies in San Benito and Santa Cruz.
- Merced County, inviting agencies in San Joaquin, Amador, Calaveras, and Madera.
- Fresno County, inviting agencies in Tulare, Inyo, Kings and Kern.
- Santa Barbara County, inviting agencies in San Luis Obispo and Ventura.
- Riverside County, inviting agencies in San Bernardino, San Diego and Imperial.
- Los Angeles County, inviting agencies in the County of Orange.

As part of CCEDA's regional expansion of training and technical assistance services CCEDA will make in person visits to up to 10 CAAs as denoted above that will serve as the regional training location for each region. CCEDA will work with a "lead" CAA for each region to arrange for meeting facilities and provide training materials and consumables. CCEDA will be hosting Regional Meetings providing an introduction to "Trends in Community Economic Development," covering the following topics:

- Homelessness
  - Case Studies: CAA Responses to Homelessness
  - Affordable Housing Development and New Funding Sources
  - Strategies for Rural and LMI Communities
- Funding and Resource Development
  - Introduce CCEDA's new on-line Funding and Resource Guide
  - How to Identify and Leverage Resources
  - Funding Real Estate and Community Facilities

- CCEDA will host a new “Proposal Template/Case Statement” on-line to assist agencies seeking grant funding to improve their competitiveness, particularly for agencies without Development staff.
- CDFI Initiatives
  - Creating and supporting CDFI initiatives
  - Funding CDFI initiatives
  - Best Practices for CDFI applications
- Social Enterprise
  - Utilizing Social Enterprise to diversify your funding streams and create economic sustainability
  - Tools to plan and launch your Social Enterprise
  - Developing and Funding CED Projects
- Climate Adaptation
 

To complement CCEDA’s training sessions, CCEDA will produce an *e-How-To Manual on Climate Adaptation*, a reference guide full of findings from the research and practical strategies agencies can utilize when seeking to deploy climate adaptation tools/products in their communities. Clients will be:

  - educated on the services/products to utilize to address climate adaptation
  - educated on the policies/investments to advocate for on behalf of their communities
  - able to effectively communicate their climate adaptation needs to elected officials and business leaders, as well as be armed with the knowledge to develop and roll-out action plans that meets those needs.

**Technical Assistance (TA)**

CCEDA will continue to offer Direct Technical Assistance in three distinct areas of expertise:

- Fund Development
- Real Estate Development
- Organizational Development

Technical assistance will be focused on assisting agencies seeking to establish or move forward their community building activities, which may include community service centers, homeless facilities, housing developments, and CDFI initiatives, to name a few. Agencies engage CCEDA to find creative solutions to secure and negotiate the financial gaps in affordable housing and community development projects with non-profit bonds, non-debt funding, tax credits, seller-carry backs, interim investments and favorable long-term financing mechanisms to move the project forward and become operational.

CCEDA will continue to re-introduce TA services in regional CAA presentations as noted above. Such services may range from the initial pre-project assistance, including project concept, organizational readiness, development assistance, and project team development. CCEDA may assist clients from the initial financial structuring phase all the way to closing. Most importantly, CCEDA focuses on building organizational capacity and assets to ensure the success of future projects.

## **Resources**

Beginning in 2020, CCEDA will re-launch a marketing campaign to drive membership and to promote a new “Proposal Template/Case Statement” on-line to assist agencies seeking grant funding to improve their competitiveness, particularly for agencies without Development staff. CCEDA will also promote its *2019 Resource and Research Development Toolkit*, an on-line resource, as well as the new *e-How-To Manual on Climate Adaptation* that will be ready for publication by the end of the 2<sup>nd</sup> Quarter.

## **Brainstorming**

CCEDA provides continuing education on a variety of topics throughout the State, for those agencies expressing a greater interest, along with having the institutional support and capacity to proceed (project management staff and funding to cover staffing during the exploration process), clients may request a “Brainstorming Session” with CCEDA to explore the subject matter and/or potential project.

## **Statewide Trainings**

As in years past, CCEDA will host four in-depth continuing education conferences, two in Northern California and two in Southern California on two focused topics, featuring subject experts, resources and next step recommendations. Topics are TBD.

## **Annual Conference**

CCEDA will host an annual conference featuring a number of subject experts around a central theme. One of the biggest changes in Community Economic Development is the organizational shift away from Community Development Corporations to Community Development Financial Institutions. The former was an outgrowth of the War on Poverty and supported by numerous national foundations; today there are very few true CDCs, many of them are now focused on health and human services with significant government and philanthropic support. Over the last 25 years, CDFIs have stepped up as capital providers to for-profit and non-profit organizations seeking to create jobs, affordable housing, child care, health services and charter schools. Greater amounts of government support are available through the federal CDFI Fund and through financial institutions seeking expedited Community Reinvestment Act credit.

In 2020, CCEDA will produce the first-ever statewide CDFI conference that will invite all CAAs and other CSBG recipients as well as over 100 CDFIs and small lending programs currently operating in California. An important facet of this conference will be the national, superregional, and community banks that will attend to meet and pursue opportunities for collaboration, including making new CDFI investments. Organizations seeking to create CDFIs or secure financing from CDFIs will also be in attendance, as well as all attendees benefiting from the workshops, plenaries, industry expo and speeches and conversations with elected and appointed officials and private as well as public sources of capital. Currently, there are no West Coast-based agencies to create such synergy, and CCEDA seeks to fill this void, creating greater economic opportunity and access to capital for West Coast based agencies.

CCEDA will host a planning committee, including inviting sponsoring banks and their CRA Bank Investment Officers, along with several larger CDFIs to create an innovative and value-driven agenda.

**2020 Innovation – Non Profit Facility Fund.** CCEDA plans to call for a review to determine various options for legal structures, CDFI technical assistance, certification and capitalization. CCEDA will pursue a state lending license and capitalization with a sponsoring-bank’s support and seek to be operational within six months. CCEDA has commitments from various experienced underwriting and loan administration professionals to provide consultant technical services to the Fund for the 12-24 months. Assuming \$5 million lent, these professionals will then assume employed positions.

#	Metrics Description	Qtr 1	Qtr 2	Qtr 3	Qtr 4
1.	16 Regional Trainings on CED Trends/Trainings/Brainstorming Sessions	5	5	3	3
2.	Technical Assistance on 10-15 New Projects <ul style="list-style-type: none"> <li>• Sign up to ten to fifteen new Technical Assistance Memos</li> </ul>	3	4	6	2
3	Continuing Technical Assistance Projects <ol style="list-style-type: none"> <li>Kings Community Action Organization relocation and purchasing of a new 20,000 s.f. facility to house their food bank and centralized commercial kitchen for their Head Start Programs.</li> <li>Community Action Partnership of Kern County has requested assistance with formulating a real estate strategy, which may include affordable housing, homeless shelters and/or homeownership.</li> <li>Community Action Partnership of Sonoma has been working with CCEDA to identify resources to purchase their building.</li> <li>Community Resource Project, Inc. has requested assistance in developing a CDFI.</li> <li>CVOC is seeking funding to complete their solar-panel and trucking job training center.</li> <li>Long Beach CAA is seeking assistance is purchasing a building.</li> <li>CAA of Butte County is seeking long-term development assistance in the form of grant writing and responding to federal RFPs for eligible program/project funding.</li> </ol>	On-going			
4.	Four Statewide In-depth Topic Sessions		2		2
5.	Annual Conference (second quarter)		2		
6.	Attend 4 State CAA Quarterly Meetings	1	1	1	1
7.	Resources – Dissemination of 100 E-Resource and Research Development Toolkit	30	25	25	20
8.	Resources – Release of new e- <i>How-To Manual on Climate Adaptation</i>		By 6/30/20		

## CCEDA – ANNUAL OUTCOMES REPORT FOR FUNDERS

Training and Technical Assistance				Attendance
Training	Topic	Dates	Brief Description	
Training	CED Trends	4/30/19	CCEDA spoke at National NACEDA Conference on CED Trends.	100
Training	Introduction to CCEDA Training and Technical Assistance Services	5/7/19	Provided an overview of CCEDA Training and Technical Assistance Services at Boyle Heights Community Round Table	15
Training	Re-Introduction of CCEDA Services and Funding Sources	9/5/19	Merced CAA	3
Training	Re-Introduction of CCEDA Services and Funding Sources	9/5/19	Sacramento CAA	8
Training	Re-Introduction of CCEDA Services and Funding Sources	9/11/19	Kern CAA	11
Training	Re-Introduction of CCEDA Services and Funding Sources	9/12/19	Riverside CAA	2
Training	Re-Introduction of CCEDA Services and Funding Sources	9/13/19	Long Beach CAA	4
Training	Re-Introduction of CCEDA Services and Funding Sources	9/19/19	Santa Barbara	2
Training	Re-Introduction of CCEDA Services and Funding Sources	9/26/19	Butte CAA	5
Training	Re-Introduction of CCEDA Services and Funding Sources	10/9/19	San Diego	2
Training	Innovative Funding Tools	7/8/19	Los Angeles CCEDA Training	18
Training	Innovative Funding Tools	7/24/19	Oakland CCEDA Training	20
Training	Climate Adaptation	10/8/19	Los Angeles	25
Training	Climate Adaptation	10/10/10	Oakland	25
Training	Leadership in Community Economic Development	11/14/19	Oakland	100
<b>TOTAL</b>				<b>340</b>