



CCEDA

2023 ANNUAL REPORT

California Community
Economic Development
Association

cceda.com

213-625-0105



2023 HIGHLIGHTS



Hosted 1st Policy
Conference in 10 years:
100 attendees



Provided Direct
Technical Assistance
to 22 CBOs



\$3.25+ million raised
for Community
Based Organizations



Secured New CDFI
Certification:
Creser Capital Fund



4 New Lending
Entities Created



Over 409 hours
of TA conducted



Community Needs
Assessment completed
in Calaveras &
Sacramento



Revised California
Investment Innovation
Fund Eligibility



\$13.7 Million
ADUs funded



Completion of CDFI
Organizational
Feasibility Study



CCEDA

CCEDA IN 2024

CCEDA remains dedicated to delivering Outreach, Continuing Education, and Technical Assistance to its entire recipient network, with a specific emphasis on reaching out to smaller agencies facing bandwidth constraints in seizing economic opportunities that could augment resources for their communities. The programming undertaken by CCEDA will concentrate on tackling various economic opportunities and initiatives, including but not limited to affordable housing, support for small businesses, and the promotion of community economic development.

THANK YOU TO OUR FUNDERS

CCEDA thanks the following institutions for their generous support this ongoing year. We greatly appreciate their partnership with the community development field in revitalizing California's neighborhoods through a full range of community building strategies including but not limited to real estate development-housing, retail and commercial-business assistance and lending, social services, and job training and creation.

OUR FUNDERS



First Citizens Bank



www.cceda.com

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2023 Impact Report

Mission

CCEDA empowers organizations serving people of color, and others, to create economic opportunity and social equity in low to moderate income communities.

Vision

A socially just and economically equitable California.

Values

Social Justice – CCEDA promotes racial, economic, and environmental justice.

Stewardship – CCEDA is trustworthy, transparent, and acts with the highest integrity in finance, governance, and grant management.

Empowerment – CCEDA seeks to advance members and communities through education, training, technical assistance, and leadership development.

Engagement – CCEDA responds to changing needs by visibly advocating for effective public policy and actively collaborating with member organizations, government, and funders.



Strategy

Technical Training – Improve the operation of community development organizations through technical training.

- Expand real estate, social enterprise, and fund development training and technical assistance.
- Develop and implement CDFI technical assistance.
- Develop and implement climate adaption training and technical assistance.

CDC & CDFI Development – Lead research, analysis and technical assistance to support the creation of new CDCs and CDFIs.

- Develop and implement training for first-time chief executive officers
- Develop and implement training for senior leaders aspiring to be chief executive officers.
- Support chief executive officers in strategic implementation.

Fund Development – Be the premiere source of fundraising assistance for community development organizations and provide direct assistance in grant and proposal development.

- Expand fund development assistance to members, assisting in raising \$2,000,000 in 2022.
- Diversify CCEDA funding sources to foundations increasing annual funding 25%.
- Effectively function as a clearing house for funding opportunities and fundraising best practices.

Policy Advocacy – Lead legislative and administrative policy advocacy for the community economic development sector.

- Lead approval and implementation of a California Community Development Tax Credit.
- Secure budget approval for California Community Economic Development Grant Program in an amount not less than \$50 million.
- Advocate for member access to small business tax credit.
- Advocate for federal inclusion of Community Development Corporations in the Community Revitalization Act.

Lending – Create and launch a new lending organization specifically to provide access to capital to community economic development organizations.

- Establish lending infrastructure at CCEDA.
- Obtain \$5,000,000 in loan capital.
- Implement non-profit lending program with deployment of \$1,000,000 in the first year.
- Successfully apply for CDFI certification.

2023 Policy and Funding Conference

Funding a More Equitable California

Community Development in Low-Income Communities of Color

Sacramento, CA | June 5-6th, 2023



2023 CCEDA Policy Conference centers our focus on the impact of state efforts and community economic development organization on the daily, lived experience of the low-income communities and communities of color. The theme, *Funding a More Equitable California: Community Development in Low-Income Communities of Color*, encourages us to consciously consider how elected representatives, financial institutions, and community economic development organizations can work together and leverage networks to advance a more equitable economic vision in which low-income communities of color thrive.

The conference covered important current and emerging policy trends and funding opportunities for community development organizations. The conference was comprised of panels and information sessions and is designed to encourage networking among participants. To view full conference details, visit <https://policyconference.cceda.com>

Overview

2023 Policy and Funding Conference: A Spotlight on Organizations Whose Leadership Reflects the Communities They Serve

The 2023 Policy and Funding Conference was an exciting display of creativity and collaboration! We greatly thank everyone who attended, and deeply appreciate all speakers and panelists who helped make it such a success. Our network – community development organizations, funders, elected officials – exemplified a passion for supporting organizations serving low-income communities of color and led by Black, Indigenous, and People of Color (BIPOC).

Objectives & Goals

The goal of the conference was to encourage those to consciously consider how elected representatives, financial institutions, and community economic development organizations can work together and leverage networks to advance a more equitable economic vision in which low-income communities of color thrive.

Supporting and growing this network of organizations can scale the effective work they are doing to bring equity to the state's economy. Our capacity to make a meaningful difference, as CEDs, requires strong working relationships with elected officials and financial institutions.

Day One (June 5th, 2023)



California Speaker of the State Assembly, Anthony Rendon, speaking on June 5th at the CCEDA Reception for the CCEDA 2023 Policy and Funding Conference in Sacramento, CA.

The conference kicked off with an energetic evening reception thanks to a heartfelt speech by California Speaker of the State Assembly Anthony Rendon. He spoke about his upbringing as a working-class Mexican kid who struggled with grades, to a Ph.D. graduate and progressive champion for BIPOC communities during his ongoing tenure in public office. Rendon expressed his deep belief that the work

of community economic development organizations can create more opportunities for people who come from the same background as him, to find the same success. Conference sponsor representative Rockette Ewell of U.S. Bank provided a spirited welcome, followed by a very special Happy Birthday sing-along and cake cutting for our very own Board Chair Kerry Doi!



CCEDA's Board Chair, Kerry Doi (PACE) greets California Speaker of the State Assembly, Anthony Rendon, speaking on June 5th at the CCEDA Reception for the CCEDA 2023 Policy and Funding Conference in Sacramento, CA.

Day Two (June 6th, 2023)



CCEDA's Board Chair, Kerry Doi (PACE) with California Chair of the Assembly Budget Committee, Assemblymember Phil Ting and CCEDA's Executive Director, Roberto E. Barragan.

Attendees started their second day with a speech from California Chair of the Assembly Budget Committee, Assemblymember Phil Ting. He shared his experience as the first Asian-American to hold the position and provided valuable information regarding the state budget.

Ting spoke of the many opportunities for community development corporations (CDCs), community development financial institutions (CDFIs), and community action agencies/partnerships (CAAs/CAPs) to receive support from the state in efforts to bring economic development to the low-income

communities of color who have been greatly affected by COVID and lack of investment.



Carmen Herrera-Mansir, Executive Director of El Pájaro CDC; Mark Wilson, President & Chief Executive Officer, Coalition for Responsible Community Development; Robert Zdenek, Interim Executive Director, San Joaquin Valley Housing Collaborative during CDC panel.

Next, we had started our first panel focused on BIPOC-led CDCs. Panelists included CEO of Coalition for Responsible Community Development Mark Wilson, CEO of Mission Economic Development Agency Luis Granados, Executive Director of El Pajaro Community Development Corporation Carmen Herrera-Mansir, and Vice President of the Pacific Asian Consortium in Employment Billy Chun.



Interim Executive Director San Joaquin Valley Housing Collaborative, Bob Zdenek speaks during CDC panel at the CCEDA 2023 Policy & Funding Conference.

Bob Zdenek, a veteran of community development and author of *Navigating Community Development: Harnessing Comparative Advantages to Create Strategic Partnerships* moderated a discussion about

how their organization's built trust in targeted communities by successfully delivering small business assistance, emergency funding, workforce development, affordable housing, and energy services. They have all been able to expand their programs and provide support beyond their initially targeted communities, uplifting all people of color in the communities they serve.



CDC and CAA Panelists at 2023 CCEDA Policy & Funding Conference: Vice President of the Pacific Asian Consortium in Employment Billy Chun, CEO of Coalition for Responsible Community Development Mark Wilson, Interim Executive Director San Joaquin Valley Housing Collaborative, Bob Zdenek Executive Director of El Pajaro Community Development Corporation Carmen Herrera-Mansir and CEO of Mission Economic Development Agency Luis Granados.

Then came the second panel of the conference which consisted of bankers and funders. CEO of Community Reinvestment Coalition Paulina Gonzalez-Brito led the discussion with Ray Mendoza of City National Bank, Claudia Lima of First Citizens Bank, Agnes Ubalde, and Lynn von Koch-Liebert of the Strategic Growth Council on the various funding opportunities available to BIPOC-led CDCs and CDFIs. They also discussed the ways they have attempted to bring diversity to their lending practices and offer creative structures to provide CDCs and CDFIs with the capital necessary to bring economic opportunity to low-income communities of color.



Lynn von Koch-Liebert of Strategic Growth Council, Ray Mendoza of City National Bank, Claudia Lima of First Citizens Bank, CEO of Community Reinvestment Coalition Paulina Gonzalez-Brito and Agnes Ubalde, SVP, CA Market Manager, Community Development Banking, PNC Bank.

After lunch, attendees of the conference were treated to an edifying Keynote Speech by California State Treasurer, Fiona Ma. She spoke about her journey to becoming the first woman of color and the first woman Certified Public Accountant (CPA) elected to the position, then to the various programs offered by the Treasurer’s Office to CDCs, CDFIs, and CAAs/CAPs. These included CalCAP and the new Cal IIP – a program that will provide grants enhancing the capacity and ability of CDFIs to provide programs including technical assistance and access to capital to economically disadvantaged communities throughout California. She answered questions from the audience alongside special guest Shela Tobias-Daniel, Executive Director of the California Pollution Control Financial Authority.



California State Treasurer, Fiona Ma with CCEDA’s Board Chair, Kerry Doi and Executive Director, Roberto E. Barragan.

The third panel of the conference centered BIPOC-led CDFIs and was moderated by Chief Business Development Officer Pritika Ram of Community Action Partnership of Kern County. The panel included CEO of First Community Capital Jay Diallo, Executive Director of Inclusive Action for the City Rudy Espinoza, CEO of California Capital Financial Development Corporation, California Capital Financial Development, Deborah Lowe Muramoto and COO of Fresno Area Hispanic Foundation Yery Olivares.



Executive Director of Inclusive Action for the City Rudy Espinoza, CEO of California Capital Financial Development Corporation, and COO of Fresno Area Hispanic Foundation Yery Olivares, Chief Business Development Officer Pritika Ram of Community Action Partnership of Kern County, President & CEO, California Capital Financial Development, Deborah Lowe Muramoto, CEO of First Community Capital Jay Diallo and CCEDA’s Executive Director Roberto E. Barragan.

They discussed the ways smaller BIPOC-led CDFIs are uniquely positioned to provide access to capital for immigrant communities and low-income communities of color. Further, they discussed how banks can be a collaborative partner in bringing responsible economic development to communities that are often at the margins of the economy or underserved by larger CDFIs.

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We wrapped up the conference with our final panel of the day, facilitated by CCEDA Board Member Susan Howard. The State Support panel focused on funding opportunities for community economic development organizations and included District 67 Assemblymember Sharon Quirk-Silva, District 80 Assemblymember David Alvarez, District 73 Assemblymember Cottie Petrie-Norris, and District 16 State Senator Melissa Hurtado. They discussed their efforts to support community economic development since the death of redevelopment in 2011, the ways they are using their offices to advance equity for low-income communities of color, and opportunities for funding and collaboration with community economic development organizations.

Speakers

| | | |
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| <p>Fiona Ma, CA 34th State Treasurer</p> | <p>Carmen Herrera-Mansir, Executive Director of El Pájaro CDC</p> | <p>Rudy Espinoza, Executive Director, Inclusive Action for the City</p> |
| <p>Anthony Rendon, CA Speaker of the Assembly, 62nd Assembly District</p> | <p>Billy Chun, Chief Operating Officer, Pacific Asian Consortium in Employment</p> | <p>Deborah Lowe Muramoto, President & CEO, California Capital Financial Development</p> |
| <p>Kerry Doi, President & CEO, Pacific Asian Consortium in Employment</p> | <p>Ray Mendoza, Vice President, Community Reinvestment, City National Bank</p> | <p>Yery Olivares, Chief Operating Officer and CDFI (Community Development Financial Institution) Executive Director, Fresno Area Hispanic Foundation</p> |
| <p>Rockette Richardson Ewell, Vice President, California Region Manager, Community Affairs U.S. Bank</p> | <p>Paulina Gonzalez-Brito, Chief Executive Officer, California Reinvestment Coalition</p> | <p>Antonio Manning, CEO, Affordable Living for the Aging</p> |
| <p>Phil Ting, CA Assembly Member, 19th Assembly District</p> | <p>Claudia Lima, Executive Vice President, SDS Capital Group Agnes Ubalde, Senior Vice President at PNC Bank for Community Development Banking</p> | <p>Sharon Quirk-Silva, CA Assembly Member, 65th Assembly District</p> |
| <p>Robert Zdenek, Interim Executive Director, San Joaquin Valley Housing Collaborative</p> | <p>Lynn von Koch-Liebert, Executive Director of the California Strategic Growth Council</p> | <p>David Alvarez, Assemblymember, 80th District</p> |
| <p>Mark Wilson, President & Chief Executive Officer, Coalition for Responsible Community Development</p> | <p>Pritika Ram, Chief Business Development Officer, CAP Kern</p> | <p>Cottie Petrie-Norris, Assemblymember, 73rd District</p> |
| <p>Luis Granados, Chief Executive Officer, Mission Economic Development Agency</p> | <p>T. Jay Diallo, CEO, First Community Capital</p> | <p>Melissa Hurtado, State Senator (16th District - Kern/Tulare)</p> <p>Mia Bonta, Assemblymember, 18th District</p> |

This conference was made possible by the support of:



Technical Assistance

CCEDA has conducted over 409 hours of technical assistance. We have provided direct Technical Assistance to 22 community-based organizations with over \$4.25 million raised in support:

- Community Needs Assessments
- Real Estate Development
- Affordable Housing
- Loan Program Implementation
- Organizational Business Assessments
- Fund development and Grant writing

Community Development Financial Institutions

CDFI TECHNICAL ASSISTANCE GOALS



CDFI Certification



Establish Micro Lending Programs



Staff Training



Underwriting Assistance





Loan Development Programs



State Lending License Application Assistance



Fundraising Development Planning

| | |
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| <p>Creation of a CDFI in Sonoma</p>  | <ul style="list-style-type: none"> • CCEDA submitted CDFI application. Creser Capital Fund is a now CDFI. |
| <p>CDFI 2022 Resilience Fund Cohort</p> <p>The inaugural cohort includes the following organizations:</p> |  |

| | |
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| <ul style="list-style-type: none"> • African Americans for Economic Empowerment • Black Cultural Zone CDC • Chinatown Service Center • Coalition for Responsible Community Development • Community Services Unlimited Inc. • Creser Capital Fund • Entrepinayship • First Community Capital • Fresno Area Hispanic Foundation • Inclusive Action for the City • Pukuu Cultural Community Services | <p>Part of the 2022 Resilience Fund Cohort under the California Reinvestment Coalition; CCEDA has assisted eleven BIPOC organizations to establish lending programs and begin the journey to CDFI certification.</p> <ul style="list-style-type: none"> ○ The resilience fund is a two-year, \$4 million initiative to reimagine systems of capital centered on communities of color. ○ The resilience fund provides capacity building, technical assistance, and grant funding to support a cohort of BIPOC-led nonprofit organizations in achieving certification as Certified Financial Development Institutions. <ul style="list-style-type: none"> • This new generation of CDFIs will invest directly in communities hit hardest by the pandemic to build new pathways to economic resilience. |
| <p style="text-align: center;">New Lending Entities</p> <p style="text-align: center;">Created in 2023</p> | <ul style="list-style-type: none"> • Chinatown Service Center – CSC Lending • Community Services Unlimited - South Central Economic Development Fund • Fernando Tataviam Band of Mission Indians (PAKU/PCCS) - Native First Lending |
| <p>State Lending Licenses Submitted</p> | <ul style="list-style-type: none"> • Chinatown Service Center – CSC Lending |

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| | <ul style="list-style-type: none"> • Fernando Tataviam Band of Mission Indians (PAKU/PCCS) - Native First Lending • Coalition for Responsible Community Development - CRCD Community Loan Fund LLC |
| State Lending Licenses Application in Progress | <ul style="list-style-type: none"> • Community Services Unlimited |
| Credit Policy and Operational Assessments | <ul style="list-style-type: none"> • Creser Capital Fund • Fresno Area Hispanic Fund • Inclusive Action for the City |
| Micro Equity Program: | <ul style="list-style-type: none"> • Black Cultural Zone |
| Fund and Organizational Development | <ul style="list-style-type: none"> • Entrepinayship • First Community Capital • Creser Capital • Fresno Area Hispanic Fund |


Community Action Agencies

CCEDA is continuously providing Technical Assistance to Community Action Agencies. These efforts ensure that recipients of CCEDA’s technical assistance projects and training’s network can obtain strategic and targeted benefits of CCEDA’s services and receive ongoing access to important community development resources.

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| <p>Calaveras-Mariposa Community Action Agency (CMCAA)</p> | <p>CCEDA successfully completed and received approval for CMCAA’s Community Needs Assessment, reflecting a comprehensive understanding of the challenges and requirements within the community. This assessment serves as a foundation for informed decision-making and targeted interventions to address identified needs.</p> <p>CMCAA is actively engaged in developing a Housing Organizational Strategic Plan. This strategic initiative is crucial for aligning resources, goals, and activities to enhance housing-related services within Calaveras and Mariposa counties.</p> |
| <p>Community Action Partnership of San Bernardino (CAP San Bernardino)</p> | <p>CCEDA completed CAP San Bernardino’s Affordable Housing Development Readiness report. This report provides insights into the readiness of the organization to embark on affordable housing initiatives, laying the groundwork for a specific transitional housing development aimed at addressing homelessness challenges in the San Bernardino community.</p> |
| <p>Northern California Indian Development Council (NCIDC)</p> | <p>CCEDA completed NCIDC’s Community Needs Assessment. This assessment reflects the organization’s commitment to understanding and addressing the unique needs of the Northern California Indian community.</p> |
| <p>Community Action Board of Santa Cruz</p> | <p>CCEDA is currently in the process of engaging CAB Santa Cruz to pursue development of a new headquarters and service facility. CCEDA will provide space planning, site identification and fund development to support Real</p> |

| | |
|---|---|
| <p>(CAB Santa Cruz)</p> | <p>Estate Readiness & Development. This initiative signifies a commitment to enhancing the organization's capabilities in real estate, ensuring it is well-prepared for future community development projects.</p> |
| <p>Community Action Partnership of Sonoma (CAP Sonoma)</p> | <p>Under new leadership, the Community Action Partnership of Sonoma is adapting to organizational changes by working with CCEDA to reassess CAP Sonoma's current real estate portfolio and pursue new development opportunities in support of a new headquarters facility.</p> |
| <p>CommUnify</p> | <p>CCEDA and CommUnify are actively engaged in a Senior Digital Literacy Needs Assessment survey. Recognizing the importance of digital literacy, the organization seeking to develop a comprehensive understanding of the needs of the senior population it serves.</p> |

Community Development Corporations

| | |
|--|---|
| <p>Creation of a New CDC in Modesto</p>  <p>Stanislaus Equity Partners</p> | <p>CCEDA has a track-record in establishing faith-based CDCs, notably with the recent creation of Stanislaus Equity Partners (STEP) CDC in Modesto. STEP received \$5 million from the county of Stanislaus to start their CDC.</p> <ul style="list-style-type: none"> • CCEDA provided Organizational Strategic Planning leading to STEP’s Strategic Plan completed and approved. |
| <p>Rise Economy</p>  <p><i>Formerly California Reinvestment Coalition</i></p> | <p>Resiliency Fund 2.0 Program Implementation</p> <ul style="list-style-type: none"> • CCEDA will develop Loan Program and Policies for Resiliency Fund (RF) 2.0 • RF 2.0, a new community impact fund which will support access to capital for new and emerging BIPOC CDFIs |
| <p>Faith and Community Empowerment</p>  <p>FACE FAITH & COMMUNITY EMPOWERMENT</p> | <p>CCEDA has achieved a significant milestone by successfully completing the Community Development Financial Institution (CDFI) Organizational Feasibility Study for FACE (Faith and Community Empowerment).</p> |
| <p>ICON CDC</p>  <p>ICON CDC Initiating Change in Our Neighborhoods</p> | <p>In Progress:</p> <ul style="list-style-type: none"> ○ Developing Loan Program <p>Organizational Assessment and State Lending License Application</p> |

Technical Assistance Trainings

Total Webinars in 2023: 10

Total Registrants: 776

Total Attendees: 549

CCEDA held 10 Training Activities in 2023. Topics included the Small Business Loan Guarantee Program, the OCS Community Economic Development Grant, social media, and accessory dwelling units.

SSBCI and SBLGP Webinar with IBank – Jan 12th, 2023:

State Small Business Credit Initiative and Small Business Loan Guarantee Program overview for community development organizations. The Small Business Loan Guarantee Program (SBLGP) will

expand access to capital for small businesses throughout the state, including those located in underserved communities, by strengthening existing relationships with lenders that have established presences in the small business community. California has allocated over \$390 million to this program.

Presenters: Megan Hodapp, Small Business Finance Center Manager, IBank; Lydia Looknanan, Senior Loan Officer, California Capital Financial Development Corporation; Juan Hernandez, President and CEO, California Southern Small Business Development Corporation

OCS/CED Pre-Planning Webinar – Jan 17th, 2023:

OCS/CED grant overview and educational session on how to pre-plan for applying.

Presenters: Donovan Jacobs, Senior Grant Consultant, CCEDA; Emi Reyes, CEO, Burbank Housing; Mark Wilson, Executive Director, Coalition for Responsible Community Development

OCS/CED Application Webinar – March 1st, 2023:

OCS/CED application overview and informational session on how to write a strong application that meets all requirements.

of Registrants - 105

Presenters: Lynda Perez, Director of the Division of Community Discretionary and Demonstration Programs Office of Community Services; Donovan Jacobs, Senior Grant Consultant, CCEDA

Social Media Webinar – March 21st, 2023:

An overview of social media presence for Trending sounds/video formats

Presenters: Dawn Perkins, Membership & Marketing Coordinator, CCEDA

CDC Development and Overview – September 14th, 2023:

An overview of CDC. In-person presentation as part of the San Joaquin Valley Housing Collaborative Housing Summit.

ADU 101 Webinar – September 21st, 2023:

An overview of Accessory Dwelling Units (ADUs).

of Registrants - 405

of Actual Attendees – 194

Webinar content and discussion points:

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| <ul style="list-style-type: none">• ADU info<ul style="list-style-type: none">○ What is an ADU?○ Why Build an ADU?○ ADU variations | <ul style="list-style-type: none">○ Estimated Costs○ Financing options○ Project timeline |
|--|--|

Presenters: Elias Garcia, Training and Policy Manager, CCEDA; Dawn Perkins, Membership & Marketing Coordinator, CCEDA

How to Apply for the CalHFA ADU Grant Webinar – October 30th, 2023:

A step-by-step informational session demonstrating how to apply for the latest round of CalHFA ADU grants.

Presenters: Elias Garcia, Training and Policy Manager, CCEDA; Ari Gati, CEO/Founder HOMEPLEX

Real Estate Webinar: Developing Facilities and Headquarters Webinar – October 31st, 2023:

An educational overview on developing headquarters, community facilities, and organizational facilities.

Presenters: Tomás Duran, President, Concerned Capitol; Ricardo Noguera, Economic Development Manager, City of Brentwood

How to Apply for the California Housing Finance Agency ADU Grant with CCEDA Webinar (Spanish Version) – November 17th, 2023:

A step-by-step informational session demonstrating how to apply for the latest round of CalHFA ADU grants.

Presenters: Elias Garcia, Training and Policy Manager, CCEDA; Manolo Lopez, ADU Grant Advocate, CCEDA

CDFI FA-TA Webinar Part 1: Pre-application readiness and preparation Webinar – November 28th, 2023:

This webinar is meant to assure that organizations are well-positioned to apply in advance of the announcement of application opening.

Presenters: Donovan Jacobs, Grant Specialist, CCEDA

Policy & Advocacy

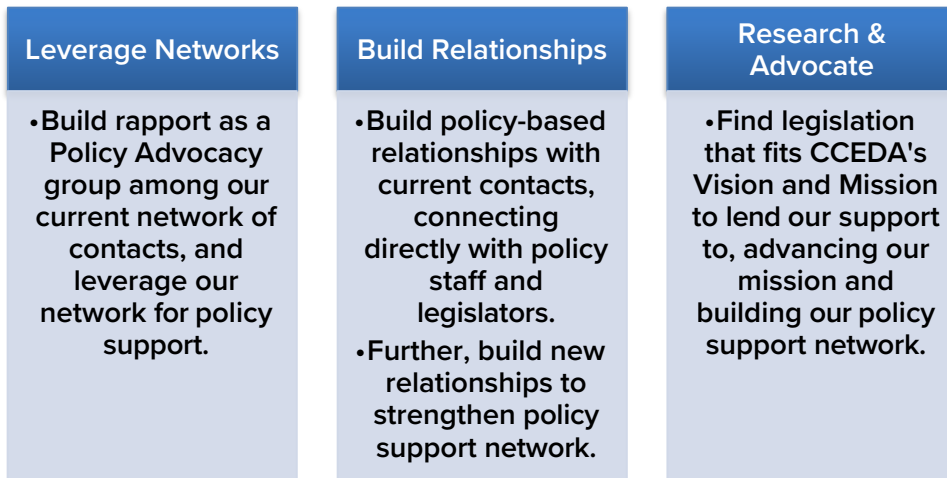
Advocacy Vision

CCEDA will work to create **just and equitable economies in low-income communities of color** who have been historically discriminated against due to racism and classism. Our work will **create thriving communities who can protect themselves from economic exploitation and predation.**

Advocacy Mission

CCEDA will advance and support legislation that **serves to economically benefit and empower low-income communities of color.** On issues ranging from wealth building to affordable housing, worker's rights, creating quality jobs, defending from economic exploitation, to energy/solar access; we will introduce and build coalitions of support for legislation that **serves historically marginalized low-income communities.**

The Process



Policy Highlights

| Policy Support | Cal IIP | Low-Income Renewable Access | Cal HFA ADU Grant |
|--|--|---|--|
| <p>Support received over 10 pieces of legislation with support letters, testimony, public comment, and advocacy campaigns.</p> | <p>CCEDA Collaborated with the Treasurer’s Office to enhance opportunities for small CDFIs in the California Investment and Innovation Program (Cal IIP), including exempting CDFIs with assets under \$10 million from the audited financial requirement.</p> | <p>Formed a coalition of 13 groups, successfully urging the CPUC to allocate an extra \$900 million in incentives for low-income individuals adopting residential solar and battery storage. About \$630 million is designated to aid low-income households in acquiring rooftop solar systems.</p> | <p>Advocated to Cal HFA for an extension of the Cal HFA ADU Grant Program, specifically for low-to-moderate income communities, resulting in an extension of the program and a lowering of income limits to target low-to-moderate income communities.</p> |

Policy Report

The information presented below is a list and overview of Policy Activities conducted by CCEDA in 2023.

Support Campaigns

CCEDA supported the following bills with letters of support (sometimes multiple), testimony, public comment, and request for support from membership:

- SB 423: Land use: streamlined housing approvals: multifamily housing developments. - Scott Wiener
- AB 538: Multistate regional transmission system organization: membership. - Chris Holden
- SB 418: California Prison Redevelopment Commission. - Steve Padilla
- SB 594: Beneficial owners. - Maria Elena Durazo
- SB 851: Self-generation incentive program. - Henry Stern
- AB 1231: Telecommunications: combining lifeline, federal lifeline, and federal Affordable Connectivity Program subsidies. - Miguel Santiago
- AB 919: Residential real property: sale of rental properties: right of first offer. - Ash Kalra
- SB 4: Planning and zoning: housing development: higher education institutions and religious institutions. - Scott Wiener
- AB 1033: Accessory dwelling units: local ordinances: separate sale or conveyance. - Phil Ting
- SB 1208: Low-income utility customer assistance programs: concurrent application process. - Ben Hueso
- Section 1071 of the Dodd-Frank Act

Testimony/Public Comment

DMV NOW – CCEDA provided public comment in support of the DMV NOW programs, which provides low-cost DMV service kiosks that accommodate various languages and payment types. These kiosks are highly beneficial to low-income and immigrant communities and are often found in predominantly Latino neighborhoods.

CA Lifeline – CCEDA provided public comment in support of allowing the CA Lifeline program to be available to low-income Californians who are also receiving benefits from the federal Affordable Connectivity Program, as well as a call for public comment from our network.

Low-Income Renewable Campaigns

AB 1231 – CCEDA partnered with Goal Zero, a leader in portable power solutions, to garner support for AB 1231, a bill that would extend Self-Generation Incentive Program benefits to low-income communities and provide funding for upfront costs of renewable technology in low-income households.

- CCEDA collected a total of 5 letters of support for the bill.
- CCEDA provided testimony to Senate Committee on Energy, Utilities and Communications

NEM – CCEDA also advocated for changes to the California Public Utilities Commission’s (CPUC) Net Energy Metering billing system that would benefit low-income communities and provide more access to renewable energy technology.

CCEDA created a coalition of thirteen nonprofit organizations in support of our efforts and achieved an introduction of an additional \$900 million in upfront incentives for residential solar plus battery storage adopters. Approximately \$630 million are set aside to help low-income households purchase rooftop solar systems.

California Investment and Innovation Program

Collaborated with the Treasurer’s Office to enhance opportunities for small CDFIs in the California Investment and Innovation Program (Cal IIP), including exempting CDFIs with assets under \$10 million from the audited financial requirement.

Community Development Tax Credit Bill

CCEDA made a second attempt at pushing a Community Development Tax Credit Bill.

We held meetings with multiple legislators but were unable to secure a sponsor. *We believe the biggest obstacle in securing a sponsor was the budget deficit this year.* We still have a coalition of **27 organizations** willing to support a community development tax credit bill.

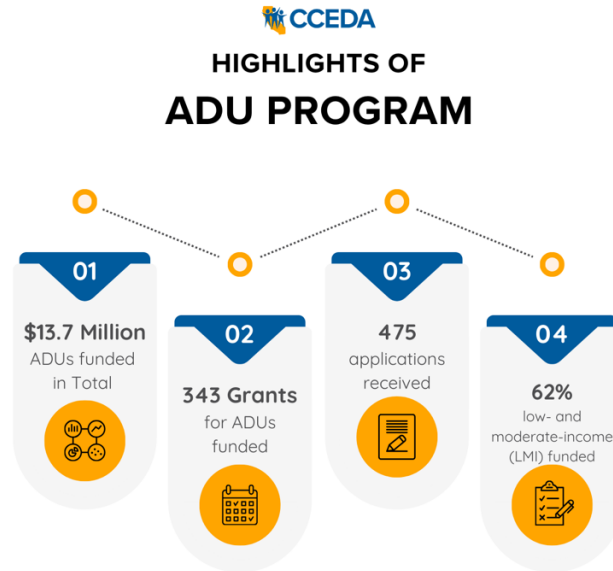
Collab and partnerships

CCEDA has participated in the following working groups dedicated to housing policy advocacy:

- California community housing working group.
 - SB 634, passed heavily amended, doesn’t apply to single-family zoning.
- Rise Economy Housing Committee

Cal HFA ADU Grant Program

CCEDA advocated for an extension of the Cal HFA ADU Grant Program, specifically for low-to-moderate income communities, resulting in another round of \$25 million for the program and a lowering of income limits to target low-to-moderate income communities. CCEDA continues to partner with the California Housing Finance Agency (CalHFA) to help low to moderate income homeowners throughout California receive \$40,000 grants to cover pre-constructions costs for building accessory dwelling units (ADUs).



Cal HFA ADU Grant:

Advocated to Cal HFA for an extension of the Cal HFA ADU Grant Program, specifically for low-to-moderate income communities, resulting in an extension of the program and a lowering of income limits to target low-to-moderate income communities.

Metrics:

- We have funded 343 grants to date totaling \$13.7M.
- We remain at 62% LMI – 212 Low Income (LI – 80% of 2023 Household AMI)
- 20% of our funded grants have identified as Hispanic and with 7% identified as Black.

More info available on www.adu.cceda.com.

Marketing & Membership

CCEDA's enhanced website offers a range of features, including information on technical assistance training, webinars, workshops, job opportunities, a news section, events calendar, and exclusive content for members. The site is equipped with a live chat feature for quick answers to visitor queries. The revamped 'Resources' section, powered by **MemberSpace**, provides exclusive member-only content such as case studies, dictionaries, toolkits, and guides, specifically tailored to support the development of Community Development Corporations, Community Development Financial Institutions, and similar entities.

CCEDA Membership Update:

- **365 Total Memberships (Compared to 2022: 61 members)**

Membership Benefits:

- CED Dictionary
- Research & Development Toolkit
- How-To Manuals/Resource Guide
- Case Studies
- Guides & Presentations – Watch & Download Webinar Presentations and Files
- Q&A Guides for CDCs and CDFIs
- Helpful Workbooks on CED practices
- Post Your OWN Organization's Upcoming Events & Webinars on CCEDA's Calendar – Up to SIX per year (subject to approval)

Networking Opportunities:

- Connect with other organizations in California's CDC networks
- Priority access to Live sessions/Webinars with early notifications and registration

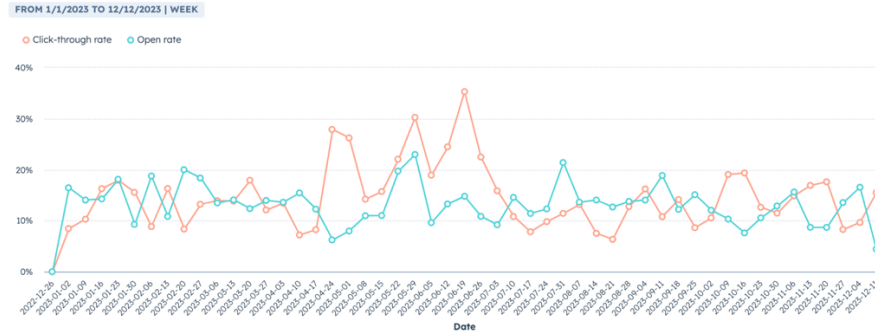
- Access to Members-only events
- Spotlight your organization on CCEDA's website

Resources for CED Training and Funding:

- Monthly newsletters
- Weekly funding newsletters
- Information on available funding
- Free and/or discounted specialized training.
- Discounted conference registration
- Professional networking opportunities
- Technical assistance with projects
- Advocacy on issues affecting the CED community

Marketing

Email Performance over time:



Trend in Email Performance: Performance sprouting during May-June 2023 due to Policy Conference

Key Observations:

- Increased open rates** in May and June email campaigns, attributed to heightened interest generated by the Policy Conference.
- Higher click-through rates** due to resonant content and effective calls-to-action, leading to increased engagement with resources.
- Improved conversion rates** driven by focused and targeted email campaigns related to the Policy Conference, guiding recipients toward desired actions.
- The Policy Conference acted as a catalyst for **audience expansion**, attracting new subscribers and contributing to overall email list growth, amplifying campaign reach and impact.

More Recipient Engagement Metrics:

Recipient engagement

[Save report](#)

Date Range: From 1/1/2023 to 12/12/2023

SENT
206,671
191 Emails
▲ 26.87%

OPEN RATE
13.61%
28,022 Opened
▲ < 0.01%

CLICK RATE
1.65%
3,394 Clicked
▲ 0.29%

CLICK-THROUGH RATE
12.11%
-
▲ 2.1%

REPLY RATE
0.02%
32 Replied
▲ < 0.01%

- Highest Open Rate: 52.94%**
 - **CCEDA: New Member - MemberSpace (02-08-2023): 52.94%**
 - **CDFI Fund Application (12-08-2023): 45.24%**
- Highest Click-Through Rate: 66.67%**



- Press Release: CCEDA UNVEILS SURVEY INTO BANK SUPPORT FOR CALIFORNIA CDCS AND CDFIS (11-08-2023): 66.67%
- All Lists: Weekly Funding Newsletter (03-13-2023): 41.6%
- Highest Click Rate: 18.18%
 - Press Release: CCEDA UNVEILS SURVEY INTO BANK SUPPORT FOR CALIFORNIA CDCS AND CDFIS: 18.18%

Social Media

