

EQUITY TAKES ROOT Cultivating Community Transformation





EXECUTIVE LETTER FROM DEBRA GORE-MANN, PRESIDENT & CEO OF THE GREENLINING INSTITUTE

In reflecting on the opportunities, the setbacks, and the ways the world continues to shift—this past year was one of strengthening foundations and preparing to meet the challenges ahead.

Our communities are foundational to our work the rich multiracial, multicultural tapestry of our people who came before us and those who will come after. It is upon that foundation that we are cultivating our vision for a just future for all.

2023 marked the 30th anniversary of Greenlining's founding. Three decades of fierce commitment to building a just economy, of tackling the lingering legacy of redlining, and of fortifying resilience against the forces that seek to wear us down.

From initiatives like Greenlining the Block and our successful advocacy for transparency measures in the California Legislature, to bringing our community together in-person for our Just Future Summit in Oakland, we spent the year celebrating our collective capacity and recommitting to building more just, healthy, and equitable communities.

We shaped policies to build an abundant future, recognizing the urgent threats posed by the climate crisis and new frontiers of redlining in the forms of AI bias and bluelining. We also confronted the implications of the Supreme Court's ruling on Affirmative Action which reignited a maelstrom of opposition to raceconscious policies that combat historic and ongoing inequity. Despite efforts to fortify the status quo that burdens communities of color, our commitment to transformative change remains unwavering. As you'll see in this report, our work deeply reflects this promise to our communities to ensure equity is hardwired into the systems that touch every aspect of our lives.

Greenlining is cultivating full-scale transformation from the ground up. It is through our collective efforts that we will progress towards this future we deserve. Together, we will forge ahead, fueled by our shared vision of a more just and equitable society for all.

In solidarity,



Debra Gore-Mann PRESIDENT & CEO, THE GREENLINING INSTITUTE





POLICY DEVELOPMENT

POLICIES TO SHAPE An Abundant future

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Greenlining partners with communities of color to establish equity-driven policy solutions at the intersections of race, climate, and the economy. We work with implementing agencies in California and nationally, and inform policy development at the California Legislature.

CASE STUDY

SB 253: Accountability and Transparency for Communities of Color

As increasingly devastating impacts of the climate crisis continue to hit communities of color first and worst, financial institutions and corporations must be held accountable to the ways they contribute to climate change.



Sponsored by The Greenlining Institute, SB 253: The Climate Corporate Data Accountability Act, makes California the first state in the nation to demand climate pollution transparency, recognize the right of communities to know how and if corporations are working to reduce their emissions, and address the importance of verifying corporate claims of sustainable leadership. (Image credit: Fenton Communications) Without this transparency, we can't protect our communities from ongoing harm. Greenlining co-sponsored the California Climate Corporate Accountability Act (SB 253, Wiener), which was signed by Governor Newsom in October 2023.

This legislation requires publicly and privately held companies operating in California with revenues over \$1 billion to disclose their full greenhouse gas emissions footprint to the public.

With the Climate Corporate Data Accountability Act, California is the first state in the nation to demand climate pollution transparency, recognize the right of communities to know how and if corporations are working to reduce their emissions, and address the importance of verifying corporate claims of sustainable leadership.

ADVOCACY C

2023-2024 California State Budget Wins

The Greenlining Institute worked in coalition to advance budget priorities that targeted investments into equity programs and communities of color. The 2023-2024 State Budget included funding for several key budget priorities:

THE 2023-2024 STATE BUDGET FUNDED SEVERAL KEY PRIORITIES

\$10 million

for capacity building through Regional Climate Collaboratives

\$60 million

for transportation and mobility equity programs

\$3.8 million in 2023, and

in 2029 to support a new Racial Equity

\$3.1 million

Commission.

\$6 million

continued investment in the State Small Business Credit Initiative including \$26 million for technical assistance, and \$8 million to support women-owned businesses



CASE STUDY

Bluelining: Climate Financial Discrimination on the Horizon

As part of our commitment to holding financial institutions accountable for their climate and economic impacts, Greenlining published "<u>Bluelining: Climate Financial Discrimination on</u> <u>the Horizon</u>" in August 2023.

The report analyzes "bluelining," an emerging trend where institutions are increasing prices or withdrawing services from regions they perceive to be at high environmental risk.

Early research into this phenomenon shows similar trends as redlining, with communities of color and low-income communities that bear



View of the San Francisco Bay Bridge amidst a wildfiresmoke sky on September 9, 2020. (Photo Credit: Brittany Hosea-Small, Getty Images)

disproportionate climate impacts at higher risk of being bluelined.

The report provides policy recommendations as initial, concrete steps to promote racial and economic equity and prevent systemic financial risk and societal harm to climatevulnerable communities.

CASE STUDY

AB 302: Combatting the New Frontiers of Redlining in AI

In response to the rise of algorithmic and artificial intelligence-driven decision-making tools, Greenlining is working to ensure these new technologies do not perpetuate bias or discrimination in their outcomes.

We sponsored the State Automated Decision Systems Inventory Act (AB 302, Ward), signed by Governor Newsom in October 2023. This authorizes the California Department of Technology to conduct a comprehensive inventory of all high-risk Automated Decision Systems used by State agencies.

The inventory will identify the decisions these systems make or support, the potential benefits of these systems, and the measures taken to reduce the risk of inaccurate, discriminatory, or biased automated decisions

CASE STUDY

Making History with California's Racial Equity Commission

The Greenlining Institute is working to deeply embed racial equity into both governmental and private sector systems, and address the reverberating impacts of historical redlining.

In 2023, we worked with the California Racial Equity Commission to develop evidencebased recommendations that advance racial equity government practice through a systems change approach.

We also served as a member of the California Organizations for Reparations Coalition to implement the California Reparations Task Force's recommendations to address the unique harms experienced by descendants of enslaved people and acknowledge the collective harms of anti-Black racism.



California State Capitol in Sacramento. (Photo Credit: Andre m/CC BY-SA 3.0)

A TIMELINE TO THE STATE'S FIRST RACIAL EQUITY COMMISSION

AUGUST 2020

In response to calls for racial justice, the California Strategic Growth Council passed a Racial Equity Resolution.

SEPTEMBER 2020

Governor Newsom signed a bill establishing California Reparations Task Force.

DECEMBER 2020

Senator Pan and a coalition including Greenlining, NextGen Policy, and Catalyst California, introduced SB 17 to establish the California Office of Racial Equity.

JUNE 2021

The California State Assembly passed House Resolution 39, establishing legislative equity impact analyses.

SEPTEMBER 2022

Governor Newsom signed an Executive Order creating the state's first Racial Equity Commission.



HOUSING AND HOMEOWNERSHIP

Greenlining is working to build a different future, one where housing is a human right and contributes to healthy, resilient communities for all.

Everyone should be able to live in a home that is affordable, safe, resilient to the impacts of climate change, and contributes to intergenerational wealth-building.

In 2023, Greenlining launched a new housing platform outlining our plan to increase the quantity of and access to affordable housing, while also striking a balance with efforts to create equitable, climate resilient communities.



Construction on a home in process. (Photo Credit: Josh Olalde via Unsplash)

GREENLINING'S NEW HOUSING PLATFORM IS ROOTED IN THESE VALUES



Housing is a human right

Visit our Housing Platform



Housing connects everything



Housing policy must be anti-racist



EQUITY IMPLEMENTATION

EQUITABLE IMPLEMENTATION FOR LASTING CHANGE

To create lasting change for communities of color, Greenlining works to ensure our hard-fought policy wins are implemented equitably.

We develop mechanisms to sustain equitable practices by embedding them in government guidelines and regulations, and bolstering tracking and evaluation measures to ensure equity outcomes are realized.





SPOTLIGHT

Modernizing the Community Reinvestment Act

2023 presented a historic opportunity to update the Community Reinvestment Act, the nation's landmark anti-redlining legislation, with regulators calling on the public to offer recommendations to update the law in order to more effectively meet its original intent: ensuring banks play their role in addressing the harm inflicted on redlined communities.

Greenlining mobilized partners to urge regulators to modernize and strengthen the CRA.

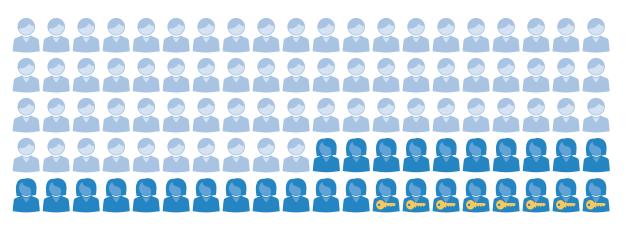
Greenlining led a national working group to develop recommendations for incorporating

race-based solutions as well as climate resilience measures into the provisions of the updated CRA. We led the development of a comment letter with over 90 co-signers, and delivered in-person community guidance with coalition members to federal financial regulators in Washington, D.C.

When the final rule came out later that year, we were encouraged to see new provisions in the CRA that will hold banks accountable to investing in some climate resilience activities.

However, the new rule ultimately failed again to explicitly name race as a criteria, and did not adequately prioritize investments in communities most vulnerable to climate change impacts—often the same communities of color that endured persistent redlining.

Only **EIGHT PERCENT** of the home loans made by the major lenders in California are to women of color, but they make up 30% of the state's population.



Home Purchase Loans by Race and Gender, Home Lending to Communities of Color in California, The Greenlining Institute, 2023. (Graphic Credit: Design Action Collective)

CASE STUDY

Vulnerable Communities Climate Mapping Platform

The California Office of Planning and Research launched the <u>Vulnerable Communities Platform</u>, a mapping tool that holistically displays all the data one would need to understand who is most vulnerable to climate change in California.

The Community Resilience Working Group, made up of 10 environmental justice and equity organizations and co-chaired by Greenlining and the Asian Pacific Environmental Network, was instrumental in shaping the successful design of the platform by bringing community voices and input to the development process.

By centering the leadership of frontline communities, the CRWG has helped shape the development of California's emerging climate resilience initiatives, and modeled a bottom-up approach to community engagement.



The California Office of Planning and Research, APEN, Greenlining and CRWG members presenting on the mapping platform at the 2023 climate adaptation forum in Pomona, CA. (Photo Credit: Sona Mohnot)

CASE STUDY

Affordability and Access: California's Clean Energy Needs

Access to affordable clean energy resources is critical for the health and wealth of communities of color. This year, Greenlining monitored implementation of California legislation and regulations that will help low-income communities of color access and afford clean energy.

We submitted public comments to the California Energy Commission's Equitable Building Decarbonization program and worked directly with the agency to ensure equitable program implementation and funding distribution. We analyzed California Public Utilities Commission proceedings and advocated to advance energy legislation that is equitable and affordable for low-income communities of color.

This year, we also focused on education and outreach that supported advocacy efforts on building decarbonization with a focus on equitable implementation and workforce development.



Greenlining's energy equity work is building towards affordable clean energy access for all communities. (Photo Credit: Agung Pandit Wiguna via Pexels)

CASE STUDY

Implementing Justice40: Community-Driven Clean Transportation Projects

Greenlining is a member of the <u>Clean Cities</u> <u>Coalition Network</u>, one of 21 federal programs selected to pilot the Justice40 initiative and develop best practices to guide implementation. Justice40 is the Biden-Harris Administration's signature climate program that requires 40% of certain federal investments flow to disadvantaged communities. The network includes over 75 coalitions across the country working to develop clean transportation and mobility projects prioritizing disadvantaged communities.



Clean Cities Justice40 Pilot participants on a site visit in Donaldsonville, Louisiana. (Photo Credit: Hana Creger)

In 2023, Greenlining offered technical assistance and capacity building to 17 of those coalitions

to hire and train community engagement liaisons that conducted needs assessments and shaped the development and implementation of the Clean Cities projects within disadvantaged communities. Ultimately, this work to build trusting partnerships with community stakeholders and identify community-driven mobility and clean fuel projects will prepare communities to apply for implementation funding.

SPOTLIGHT (

Federal Engagement on Equity Implementation

Having a robust regulatory environment is critical for building wealth in communities of color to protect against predatory and harmful practices that exacerbate the racial wealth gap.

Climate change is a threat multiplier with communities of color facing disproportionately greater health and wealth impacts from pollution and climate disasters. Through Greenlining's work in California, we've developed best practices to help remove barriers to wealth building and inform equitable implementation of laws designed to protect communities of color.

Greenlining's Economic Equity policy team traveled to Washington D.C. to meet with federal agencies including the Federal Reserve, the Office of the Comptroller of the Currency, the Federal Deposit Insurance Corporation, and the U.S. Department of Housing and Urban Development.

The team raised the importance of centering racial equity in all applications of our laws to reverse the consequences of redlining. In particular, our team emphasized how critical it is to center communities of color in the implementation of newly issued rules for the Community Reinvestment Act and HUD's Affirmatively Furthering Fair Housing rule.

Greenlining also met with the White House Council on Environmental Quality, and submitted over 20 regulatory advocacy letters to federal and state agencies to advance our race-conscious climate policy solutions.



Greenlining staff and coalition met with federal agencies including Chairman of the Federal Reserve, Jerome Powell. (Photo Credit: Britt Leckman)



CAPACITY BUILDING

PARTNERSHIP FOR Community-led change

Greenlining serves as a bridge-builder, linking communities with resources and networks of support to ensure equity investments and initiatives result in meaningful benefits for those most impacted by historic injustice. Through collaboration and dialogue with key stakeholders on the ground, as well as with the public and private sectors, we work to ensure community needs and aspirations are incorporated into actionable strategies and investments in neighborhoods.

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INVESTING IN COMMUNITY CAPACITY:

seminars hosted by Greenlining for partners to advance the capabilities and influence of BIPOC-led organizations 33

organizations from Colorado, Illinois, Michigan, North Carolina, and Virginia convened through Towards Equitable Electric Mobility network



grassroots, environmental justice, and equity-focused organizations receive sub-grant support

SPOTLIGHT

Greenlining the Block: A Catalyst for Community Transformation

Greenlining launched Greenlining the Block, our initiative to strengthen BIPOC-led communitybased organizations that are advancing climate justice neighborhood projects across the country.

The goal of Greenlining the Block is to support CBOs to successfully access and deploy federal resources through Justice40 for their climate projects.

This initiative seeks to address major structural capacity building challenges for community groups to access these resources, resulting from decades of disinvestment, and ultimately improve community engagement and empowerment through the process.

Cohort organizations receive direct capacity



Greenlining the Block: The Catalyst for Community Transformation Video. (Photo Credit: Idea2Form)

building annual grants, tailored capacity building, and facilitated peer-to-peer learning through a Community of Practice to support partners to advance climate justice neighborhood projects leveraging federal and state infrastructure funding.

Since completing our first two rounds of investments, the initiative is already showing exciting progress and successfully leveraging state and federal funding sources for their capital projects.

GREENLINING THE BLOCK: BY THE NUMBERS

24

organizations drive forward their visions for capital climate projects in California, Colorado, Illinois, North Carolina, and Michigan



in sub-grants to Greenlining the Block cohort members

9

applications submitted to federal and state programs



million successfully leveraged from California's Transformative Climate Communities program



SPOTLIGHT

Deepening Local Capacity

Greenlining's Capacity Building policy team continued to co-lead Towards Equitable Electric Mobility with Forth, bringing together over 30 organizations from Colorado, Illinois, Michigan, Virginia, and North Carolina to advance equitable electric mobility policies.

Through TEEM's Community of Practice, we supported organizations to advance individual state priorities, including the Michigan cohort which successfully advocated for an increased 2024 state transportation budget by \$110 million for public transit, \$125 million for electric school buses, and \$25 million for other e-mobility programs.

Greenlining deepened local capacity building efforts across California in Stockton, Oakland, San Diego, and Eastern Los Angeles County to strengthen local ecosystems to engage in and advance economic and climate equity priorities through efforts such as submitting comment letters on the Oakland Environmental Justice element.



We also provided community leaders in Eastern L.A. County with the capacity, resources, and partnerships needed to secure a \$22 million Transformative Climate Communities grant to fund their visions for climate resilience and equity.

We completed a bilingual climate justice workshop series in partnership with three community organizations in the San Gabriel and Pomona Valleys—Latino/a Roundtable, the National Day Laborer Organizing Network, and Lopez Urban Farm. The workshop series convened a wide range of participants including residents, day laborers, students, urban farmers, and economic justice advocates.



LEADERSHIP ACADEMY

CULTIVATING RACIAL EQUITY LEADERSHIP FOR DECADES TO COME

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The fight for a just future for communities of color spans generations, and readying the next generation to bring their visions of a just future to life is core to Greenlining's mission. Through Greenlining's Leadership Academy, we nurture growing leaders, equipping them with the skills and experience they need to lead the future of our movements for racial equity. We are also fostering an ecosystem of racial equity leaders through the Greenlining Academy Alumni Association, a network of past Leadership Academy participants.

CULTIVATING THE NEXT GENERATION OF RACIAL EQUITY LEADERS:

5

Fellows advanced their leadership and racial equity analysis through policy development and implementation through a year-long fellowship Summer Associates strengthened their equity policy analysis through a 10week summer program 26

UC Berkeley students were housed at Casa Joaquin Murrieta, a multi-ethnic residential leadership program



ALUMNI SPOTLIGHT

Noemí Gallardo: Paving the Way for Latinas

Noemí Otilia Osuna Gallardo, The Greenlining Institute's Co-Chair of the Board and former Leadership Academy Fellow, became the first Latina appointed to serve on the California Energy Commission.



Participating in Greenlining's Leadership Academy taught me how much unique lived experience is essential to embed in policy and planning to deliver better outcomes for communities, especially those that have been adversely affected by policies and practices of the past that didn't understand or include the experiences of all people. I learned that we must make every decision and take every step forward with deliberative purpose to ensure Greenlining's legacy of racial equity stays intact for generations.

77

CASE STUDY

Advocacy Day 2024

Greenlining's Leadership Academy trains multiracial college students and early career professionals to apply a racial equity framework to shaping public policy.

In July 2023, Greenlining organized two Advocacy Days in Sacramento for staff and Leadership Academy Fellows and Summer Associates to meet with policymakers on key issues impacting communities of color around the state and join important sessions and hearings on economic and climate issues.



Greenlining's Leadership Academy meet with Asm. Matt Haney and other members of the California Legislature at the 2023 Advocacy Day in Sacramento. (Photo Credit: The Greenlining Institute)

SPOTLIGHT (

The Just Future Summit

In October 2023, The Greenlining Institute hosted the Just Future Summit bringing together more than 1,100 racial justice advocates from around the country. Our event featured leading experts and commentators on the state of race today on our main stage including W. Kamau Bell, Dolores Huerta, Olivia Julianna, Linda Sarsour, and Alicia Garza. And, as 2023 marked Greenlining's 30th anniversary, our largest conference in Greenlining's history served as a pivotal moment to bring together the most important voices in the movement for equity and to build momentum for transformative change.



The powerful conversations continued as participants gathered in equity workshops and over 20 breakout sessions on the most pressing issues facing communities of color, including equitable wealth building, accountability and transparency in financial institutions, access to clean energy, housing and homeownership, and algorithmic bias.

Leaders, experts, and practitioners dove deep into the innovative strategies and holistic solutions they're exploring to tear down systemic racism and build a just future where race is never a barrier to opportunity.

Thanks to our attendees, speakers, volunteers, and donors for making this event a major success.



ORGANIZATIONAL SUMMARY

SHAPING A JUST AND EQUITABLE FUTURE

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The Greenlining Institute partners with communities of color to increase the flow of resources into formerly redlined communities, establish equity-driven policy solutions at the intersections of race, climate, and the economy, and ensure robust implementation of those policies.



Photo Credit: Castro Animations



The Greenlining Institute team at our Q4 Staff Retreat in December 2023. (Photo Credit: Alexander McCoy)



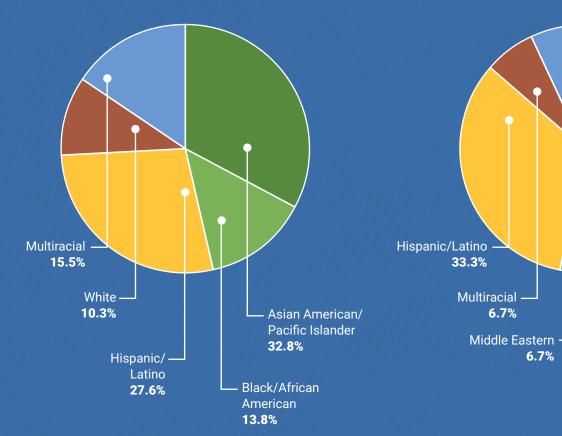
The Greenlining Institute Board members and Academy Alumni at the 30th Anniversary Celebration in October 2023. (Photo Credit: Idea2Form)



OUR PEOPLE

Who We Are

The Greenlining Institute is proud to be run and led by a majority women of color team who are committed to advancing equity-centered solutions. Over 90% of Greenlining's staff identify as people of color and 75% identify as women. This diversity is reflected in all levels of our organization including in Greenlining's executive leadership. We are also proud to include 15% of staff who identify as LGBTQ+ and 12% that identify as having a learning, physical, or otherwise non-visible disability. We see the diversity of the lived experiences represented in our staff, Board, and coalition as a source of strength, beauty, and creativity.



STAFF DEMOGRAPHIC DATA

BOARD DEMOGRAPHIC DATA

Asian American/

Pacific Islander

33.3%

Black/African

American

20%

GREENLINING'S BOARD OF DIRECTORS

As of December 31, 2023

Tunua Thrash-Ntuk, The Center by Lendistry, Co-Chair Noemí Otilia Osuna Gallardo, California Energy Commission, Co-Chair **Ortensia Lopez**, (retired) El Concilio of San Mateo County Tate Hill II, Access Plus Capital, Treasurer Debra Gore-Mann, The Greenlining Institute, CEO & President Darlene Mar, Council of Asian American Business Associations and Asian Business Association of Silicon Valley Jasper A. Cacananta, Comcast John Christian De Vera, Hirsch Philanthropy Partners, Secretary Jessica Buendia, Green for All Jose Antonio Ramirez, Community Development, Inc. Lida Aljabar, Ki Strategies LLC Mark Rutledge, Slalom Muhammad Alameldin, The Terner Center for Housing Innovation, GAAA Chair Olga Talamante, (retired) Chicana Latina Foundation

Samar Shah, Digit



FINANCIALS

2023 Financials

The 2023 financials reflect consolidated financial statements for The Greenlining Institute and Equity Works, a nonprofit business entity created to purchase Greenlining's headquarters in 2015 and support Greenlining's mission.

Greenlining's strong financial position is a result of grounded fiscal stewardship. This has allowed Greenlining to continue to advance equity-driven policies and solutions that improve the lives of communities of color.

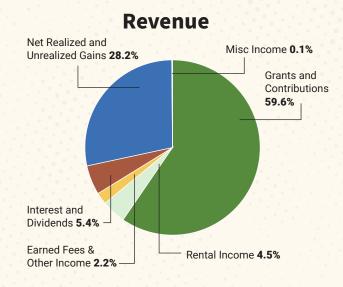
STATEMENT OF FINANCIAL POSITION

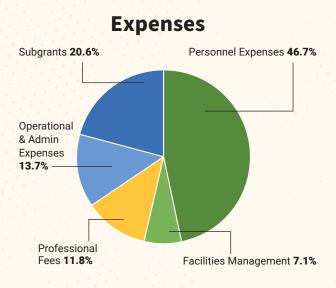
December 31, 2023

\$10,648,948
\$39,320,709
\$49,969,657
\$911,028
\$911,028
\$49,058,629

Statement of Activities	
Revenues	
Grants and Contributions	\$10,526,333
Rental Income	\$790,314
Earned Fees & Other Income	\$385,358
Interest and Dividends	\$957,710
Net Realized and Unrealized Gains	\$4,989,290
Misc Income	\$25,639
Total Revenues	\$17,674,644
Expenses	
Personnel Expenses	\$6,130,088
Facilities Management	\$935,170
Professional Fees	\$1,553,681
Operational & Admin Expenses	\$1,800,796
Subgrants	\$2,700,845
Total Expenses	\$13,120,580

Total Net Assets: \$49.06 million





DONORS

Thank you to our supporters!

Access Plus Capital Adam Dukovich Adela Grech Alan Uy Alekhya Mukkavilli Alex Katz Alexzandria Cormier-Hill Amalgamated Bank Andrew and Deborah Schwartz Charitable Fund Angelica Cortez Ann Harvey Anna Picard Anonymous Bank of America Bank of the West **Beneficial State Foundation** Bernadette Chi **Brandon Ouinn Brittany Yann** California Air Resources Board California Clean Energy Fund Capital One Carl Polek Carlee Wiley Carole Joffe Cathay Bank Cecilia Perez Celia VanDerLoop Chan Zuckerberg Initiative Charles Molnar Christi Baker

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