



## September 2023 - #010 CDCA Newsletter

### 1. CDCA 2023 Update

CDCA is planning a Defense Communities Summit in San Diego, October 17, 2023. Details will be provided separately. This offers a chance for networking, legislative updates and a CDCA update. Location will be National University at Spectrum Business Park, 9388 Lighthouse Avenue, San Diego. CDCA members are strongly encouraged to attend.

### 2. California 2023/2024 Legislation

The following is a comprehensive list of California bills affecting the military and veterans. The legislative status as of September 26 is provided.

#### **ASSEMBLY BILL NO. 3 Offshore Wind Energy**

This bill would state the intent of the Legislature to enact future legislation to accelerate the approval, implementation, and operation of offshore wind energy projects necessary to meet California's climate action goals and the transition to a clean energy economy, clarify the authority of California governmental agencies related to the analysis and selection of feasible alternatives for seawater ports and transmission infrastructure improvements required to construct wind energy projects along the California coast, and specify criteria for the analysis and selection of port and transmission alternatives related to offshore wind energy projects to ensure the protection of the environment and sensitive habitats and robust community participation and comment, to keep the maximum number of jobs related to the construction of offshore wind energy projects in California, and to achieve environmental justice goals.

**Status:** Sent to Governor September 18.

#### **ASSEMBLY BILL NO. 13 Election Day Holiday: Voting by Mail**

This bill would add the first Tuesday after the first Monday in November of any even-numbered year to the list of state holidays. By increasing the duties of local officials in connection with the creation of a new state holiday, this bill would create a state-mandated local program.

This bill would reduce the deadline for receiving a ballot to 3 days after election day.

**Status:** From committee: Without further action pursuant to Joint Rule 62(a). March 20.

## **ASSEMBLY BILL NO. 46 Military Services Retirement and Surviving Spouse Benefit Payment Act**

This bill, for taxable years beginning on or after January 1, 2024, and before January 1, 2034, would exclude from gross income retirement pay received by a taxpayer from the federal government for service performed in the uniformed services, as defined, during the taxable year. The bill, for taxable years beginning on or after January 1, 2024, and before January 1, 2034, would also exclude from gross income annuity payments received by a qualified taxpayer, as defined, pursuant to a United States Department of Defense Survivor Benefit Plan during the taxable year. The bill would make related findings and declarations.

This bill also would include additional information required for any bill authorizing a new tax expenditure. The bill would require the Franchise Tax Board and the Department of Veterans Affairs to provide any data requested by the Legislative Analyst to write the report, and would make taxpayer information received by the Legislative Analyst subject to limitation on the collection and use of that information. By expanding the scope of a crime, this bill would impose a state-mandated local program.

**Status:** In committee: Held under submission. September 1 (“Two year bill”).

## **ASSEMBLY BILL NO. 284 Annual Report: Homeless Housing, Assistance, and Prevention Program**

**Status:** To Assembly Housing and Community Development Committee February 2.

## **ASSEMBLY BILL 293: Lifetime Hunting and Sport Licenses: Gold Star Family Members**

This bill would require, upon application to the department, lifetime hunting licenses and lifetime sport fishing licenses to be issued at no cost to Gold Star Family members who meet certain eligibility requirements.

**Status:** In committee: Held under submission. May 18.

## **ASSEMBLY BILL NO. 298 Monument to Blind Veterans**

This bill would authorize a nonprofit organization that represents blind veterans, in consultation with the Department of General Services, to plan, construct, and maintain a braille American flag to serve as a monument to the blind veterans of California and the United States in the State Capitol Building. The bill would specify duties for the Department of General Services in connection with the planning, construction, and maintenance of the monument.

**Status:** Sent to Governor September 13.

## **ASSEMBLY BILL NO. 322 Veteran and California National Guard Supplemental Orientation Act of 2023**

This bill, commencing no later than the 2025–26 academic year, would require the California State University and the California Community Colleges, and if the Regents of the University of California adopt a resolution to make it applicable, the University of California to develop and include within first-year student orientation a supplemental module of services and resources available for students who are veterans of the Armed Forces of the United States and members of the California National Guard, as provided.

**Status:** Sent to Governor September 14.

## **ASSEMBLY BILL NO. 398 Voting: Replacement Ballots**

This bill would remove the requirement that the voter provide a statement under penalty of perjury, and instead require the elections official to provide a replacement ballot upon request.

**Status:** Sent to Governor September 13.

## **ASSEMBLY BILL NO. 444 California Defense Community Infrastructure Program**

This bill would establish the California Defense Community Infrastructure Program, which would require the Office of Planning and Research, to grant funds to local agencies to assist with matching fund requirements in applications for funds from the federal Defense Community Infrastructure Program. The bill would require the office, in consultation with the Governor’s Military Council, to develop guidelines for the program that, where possible, align with the guidelines of the federal program.

This bill would require the office to use specified project criteria, define an eligible project, as specified; rank eligible projects, as specified; and award grants based on the available funds. The bill would require the office to give priority to projects located in, or that would provide services to people who live in a disadvantaged community, as defined.

**Status:** In committee: Held under submission. September 1.

## **ASSEMBLY BILL NO. 684 County Veterans Services Officers: Additional Resources**

This bill would, upon appropriation by the Legislature, provide a stipend to counties that host an active United States military base for the purposes of maintaining a county veterans service officer, at least part time, at each active United States military base in the county, subject to base approval.

**Status:** In committee: Held under submission. May 18.

## **ASSEMBLY BILL NO. 714 Pupil Instruction [child of military family]**

This bill would, subject to an appropriation of funds for its purposes, require the State Department of Education, in consultation with the State Department of Social Services, to (A) develop and issue guidance regarding requirements, best practices, and available state and federally funded programs for newcomer pupils, (B) publicly report on an annual basis on its internet website the enrollment and performance of newcomer pupils, and (C) maintain at least one position dedicated to supporting local educational agencies, including charter schools, in serving newcomer pupils, as provided.

This bill would, subject to an appropriation of funds for its purposes, require the commission to consider including content designed to provide teachers with resources to meet the unique academic and English language development needs of newcomer pupils at all grade levels at the next regularly scheduled revision of the curriculum framework in English Language Arts and English Language Development. The bill would also require the commission to ensure that the instructional materials for pupils in kindergarten or any of grades 1 to 8, inclusive, that it recommends to the state board for adoption include resources to help teachers meet the needs of newcomer pupils.

This bill would require that local educational agencies comply with the above-described coursework exemptions, pupil consultation and notice requirements, acceptance of coursework completed at other schools, and other requirements for newcomer pupils, as defined, instead of for pupils participating in a newcomer program. By imposing new duties on local educational agencies, the bill would impose a state-mandated local program.

This bill instead would authorize a middle or high school pupil who is classified as an English learner and who is a newcomer pupil, as defined, or is participating in a program designed to meet the transitional needs of newcomer pupils that has as a primary objective the development of English language proficiency to be denied access to enrollment in courses that are part of the standard instructional program, as provided. By imposing new requirements on local educational agencies, the bill would impose a state-mandated local program.

This bill would provide that, if the Commission on State Mandates determines that the bill contains costs mandated by the state, reimbursement for those costs shall be made pursuant to the statutory provisions noted above.

**Status:** Sent to Governor September 18.

## **ASSEMBLY BILL NO. 883 Department of Defense SkillBridge Program**

AB 883, as introduced, Mathis. Business licenses: United States Department of Defense SkillBridge program.

This bill would additionally require a board to expedite, and authorize a board to assist, in the initial licensure process for an applicant who supplies satisfactory evidence to the board that the applicant is enrolled in the United States Department of Defense SkillBridge program, as specified.

**Status:** Sent to Governor September 14.

## **ASSEMBLY BILL NO. 953 Voluntary Vessel Speed Reduction and Sustainable Shipping Program**

This bill would require the council, on or before May 1, 2025, in coordination with various entities, including the State Air Resources Board [and air quality management districts along the coast and in consultation with the federal Office of National Marine Sanctuaries, the federal Environmental Protection Agency, the United States Navy, and the State Air Resources Board,] develop and implement a statewide voluntary vessel speed reduction and sustainable shipping program for the California coast in order to reduce air pollution, the risk of fatal vessel strikes on whales, and harmful underwater acoustic impacts. The bill would require the program to include specified components, including, upon an appropriation by the Legislature, financial incentives to program participants based on a percentage of distance traveled by a participating vessel through a vessel speed reduction zone, as provided. The bill would require the council, on or before December 31, 2026, to submit a report to the Legislature regarding the implementation of the program.

**Status:** In committee: Held under submission. September 1.

## **ASSEMBLY BILL NO. 1097 Credit History of Persons Receiving Government Rent Subsidies**

This bill would additionally prohibit the use of a person's credit history as part of the application process for a rental housing accommodation without offering the applicant the option of providing alternative evidence of financial responsibility and ability to pay in instances in which there is a government rent subsidy. The bill would require the housing provider to consider that alternative evidence in lieu of the person's credit history in determining whether to offer the rental accommodation to the applicant.

**Status:** Sent to Governor September 14.

## **ASSEMBLY BILL NO. 1143 Military: Lending Protections**

Federal law provides various protections regarding credit extended to members of the Armed Forces called to active duty, including, among others, limitations on the interest charged and mandatory disclosures. Existing law makes a security interest in personal property, other than specified modes of transportation, void if it would cause a loan procured by a covered member in the course of purchasing the personal property to be exempt from the federal protections. Existing law also makes a security interest in a motor vehicle void if it would cause a loan procured by a covered member to be exempt from the federal protections and that loan also funds the purchase of a credit insurance product or credit-related ancillary product.

This bill would exempt from those provisions loans that comply with specified provisions of those federal protections.

**Status:** To Assembly Banking and Finance Committee March 3.

## **ASSEMBLY BILL NO. 1605 Military Services Access: United States Space Force**

Existing law prohibits each school district offering instruction in any of grades 9 to 12, inclusive, that provides on-campus access to employers, from prohibiting access to the military services. Existing law defines “military services” for these purposes to include the United States Army, the United States Navy, the United States Air Force, the United States Marine Corps, the United States Coast Guard, or any reserve component of those federal forces, the National Guard, the State Guard, and the active militia.

This bill would expressly include the United States Space Force in that definition.

**Status:** Chaptered by Secretary of State - Chapter 142, Statutes of 2023. September 1.

## **SENATE BILL NO. 73 Voluntary Veterans’ Preference**

This bill would enact the Voluntary Veterans’ Preference Employment Policy Act to authorize a private employer to establish and maintain a written veterans’ preference employment policy, to be applied uniformly to hiring decisions, to give a voluntary preference for hiring a veteran over another qualified applicant. The bill would require a private employer with a veterans’ preference employment policy to annually report to the Civil Rights Department the number of veterans hired under the preference policy and any demographic information about those veterans that the employer obtained in response to the department’s reporting requirements. Under the bill, failure to submit that report would render any preference granted by the employer ineligible for the protections provided by this bill.

This bill would provide that the granting of a veterans’ preference pursuant to the bill, in and of itself, shall be deemed not to violate any local or state equal employment opportunity law or regulation, including, but not limited to, the anti-discrimination provisions of FEHA. The bill would require the Department of Veterans Affairs to assist any private employer in determining if an applicant is a veteran, to the extent permitted by law. The bill would prohibit a veterans’ preference employment policy from being established or applied for the purpose of discriminating against an employment applicant on the basis of a protected classification, as specified.

**Status:** To Assembly Judiciary Committee June 21.

## **SENATE BILL NO. 82 Property taxation: disabled veterans’ exemption: eligibility letters**

This bill would require a county assessor to accept both original and electronically generated letters of service-connected disability, as defined, for purposes of verifying eligibility for the above-described exemption. By imposing duties on local tax officials, the bill would impose a state-mandated local program.

This bill would provide that, if the Commission on State Mandates determines that the bill contains costs mandated by the state, reimbursement for those costs shall be made pursuant to the statutory provisions noted above.

**Status:** Sent to Governor September 15.

## **SENATE BILL NO. 228 Civilian Youth Opportunities Program**

This bill would require the Adjutant General to additionally conduct that program in western Riverside County.

**Status:** Sent to Governor September 11.

## **SENATE BILL NO. 267 Credit History of Persons Receiving Government Rent Subsidies**

SB 267, as introduced, Eggman. Credit history of persons receiving government rent subsidies.

This bill would additionally prohibit the use of a person's credit history as part of the application process for a rental housing accommodation without offering the applicant the option of providing alternative evidence of financial responsibility and ability to pay in instances in which there is a government rent subsidy. The bill would require the housing provider to consider that alternative evidence in lieu of the person's credit history in determining whether to offer the rental accommodation to the applicant.

**Status:** Sent to Governor September 15.

## **SENATE BILL NO. 726 Property Taxation: Exemption: Disabled Veteran Homeowners**

The California Constitution provides that all property is taxable, and requires that it be assessed at the same percentage of fair market value, unless otherwise provided by the California Constitution or federal law. The California Constitution and existing property tax law provide various exemptions from taxation, including, among others, a disabled veterans' exemption and a veterans' organization exemption.

This bill would exempt from taxation, on that part of the full value of the residence that does not exceed \$863,790, as provided, property owned by, and that constitutes the principal place of residence of, a veteran, the veteran's spouse, or the veteran and the veteran's spouse jointly, if the veteran is 100% disabled. The bill would provide an unmarried surviving spouse a property exemption in the same amount that they would have been entitled to if the veteran was alive and if certain conditions are met. The bill would require certain documentation to be provided to the county assessor to receive the exemption and would prohibit any other real property tax exemption from being granted to the claimant if receiving the exemption provided by the provisions of this bill. The bill would make these exemptions applicable for property tax lien dates occurring on or after January 1, 2024, but occurring before January 1, 2034. By imposing additional duties on local tax officials, the bill would impose a state-mandated local program. Existing law requires any bill authorizing a new tax expenditure to contain, among other things, specific goals, purposes, and objectives that the tax expenditure will achieve, detailed performance indicators, and data collection requirements.

This bill would provide that, if the Commission on State Mandates determines that the bill contains costs mandated by the state, reimbursement for those costs shall be made pursuant to the statutory provisions noted above.

**Status:** To Assembly Appropriations Committee. September 1.

## **SENATE BILL NO. 811 Teacher Credentialing: Interstate Teacher Mobility Compact**

SB 811, as introduced, Jones. Teacher credentialing: Interstate Teacher Mobility Compact. Existing law requires the Commission on Teacher Credentialing to, among other duties, establish standards for the issuance and renewal of credentials, certificates, and permits. Under existing law, California is a party to The Interstate Agreement on Qualification of Educational Personnel, a compact designed to support the movement of teachers and other professional educational personnel among the states party to it, and to authorize specific interstate educational personnel contracts to achieve that end.

This bill would ratify the Interstate Teacher Mobility Compact, the purpose of which is to facilitate the mobility of teachers across the member states, with the goal of supporting teachers through a new pathway to licensure. The compact would, among other things, require member states, in their sole discretion, to make certain determinations about teacher licensure for teachers from other member states, as provided, and create and establish a joint public agency known as the Interstate Teacher Mobility Compact Commission. This compact would only become effective if the compact statute is enacted into law in ten member states, as provided.

**Status:** To Assembly Education Committee. June 15 (“Two year bill”).

## **SENATE BILL NO. 838 Victim Compensation: Use of Force by a Law Enforcement Officer**

This bill would revise the definition of “crime” to include, solely for the purposes of eligibility for compensation under this chapter, an incident occurring on or after January 1, 2024, in which an individual sustains serious bodily injury, as defined, or death as a result of a law enforcement officer’s use of force, regardless of whether the law enforcement officer is arrested for, charged with, or convicted of committing a crime. The bill would define “law enforcement officer” for these purposes. By expanding the types of incidents for which compensation can be paid from a continuously appropriated fund, the bill would make an appropriation.

This bill, in the case of a claim based on a victim’s serious bodily injury or death that resulted from a law enforcement officer’s use of force, as described above, would prohibit the board from denying an application based on certain circumstances, including the victim’s or other applicant’s involvement in the crime, except as specified, the victim’s failure to cooperate, or the contents of a police report, or the lack thereof. The bill, in the case of a claim based on a victim’s serious bodily injury or death as a result of a crime, would require the board to adopt guidelines that allow the board to rely on evidence other than a police report, as specified.

This bill would specify that the above-described subrogation of the board applies to compensation by the board for any claim, including a claim based on serious bodily injury or death that resulted from a law enforcement officer’s use of force.

**Status:** To Senate Appropriations Committee. May 18.



### 3. How to influence legislation

Influencing state legislation can be a complex and challenging process, but with strategic planning and effective engagement, community members and organizations can make a significant impact. Here's a step-by-step guide to help you navigate the process in California:

- **Research and Educate:**
  - Understand the legislative process in California, including how bills are introduced, committees, hearings, and voting procedures.
  - Research the specific issue you're advocating for. Gather data, statistics, case studies, and expert opinions to strengthen your arguments. Research the history of similar issues.
  - Know your audience: Identify key legislators, committees, and stakeholders relevant to your cause.
- **Formulate Clear Goals:**
  - Define clear and achievable policy goals. Be specific about what changes you want to see in existing laws or regulations. Ensure goals are realistic, specific and aligned with your mission.
- **Participate in Community Meetings:**
  - Attend local community meetings, town halls, and forums to discuss the issue and build grassroots support.
  - Use these events to educate others and create a sense of solidarity within the community. Prepare talking points, position papers and presentations.
- **Build Relationships:**
  - Establish connections with other community groups, advocacy organizations, and like-minded individuals who share your concerns.
  - Network with experts, influencers, and leaders who can lend credibility to your cause.
- **Investigate Opposition:**
  - Understand the arguments and concerns of opposition groups. Anticipate their points and prepare counterarguments.
  - Tailor your messaging to address potential objections.
- **Analyze and Report:**
  - Compile all your research, data, and arguments into easily digestible materials like fact sheets, reports, or presentations.
  - Craft persuasive narratives that highlight the positive impact of your proposed changes.
- **Engage with Elected Officials:**
  - Schedule meetings with your local elected officials and their staff to discuss your concerns and proposed solutions.
  - Clearly communicate your position and the reasons for it. Provide them with your well-prepared materials.
  - Lobby via direct communication with lawmakers to influence their decisions. Understand and comply with California lobbying regulations, which may require registration and reporting.
- **Mobilize Supporters:**
  - Use social media, email campaigns, and community events to mobilize supporters and encourage them to contact their legislators.
  - Encourage supporters to share personal stories that illustrate the importance of the issue, since anecdotes can be powerful.
  - Have supporters contact legislators through phone calls, emails and social media, expressing their support for the proposed legislation.
- **Testify at Hearings:**
  - Monitor the legislative calendar for committee hearings related to your issue.
  - Register to testify at hearings and present your arguments in a concise and compelling manner.

- Use personal stories and real-world examples to make your case relatable and impactful.
- **Engage in Collaborative Advocacy:**
  - Collaborate with other advocacy groups to amplify your message and build a stronger coalition.
  - Coordinate joint efforts, such as press conferences, sign-on letters, or joint testimonies.
  - Generate media coverage with press releases, letters to the editors and on-line commentary.
  - Build bipartisan support by demonstrating broad support.
- **Track and Follow Up:**
  - Stay informed about the progress of the legislation you're advocating for. Monitor committee votes, amendments, and floor debates.
  - Send follow-up communications to elected officials to express gratitude for support or disappointment for opposing votes. This is a continuing process as legislation progresses through various committees.
- **Adapt and Persist:**
  - Be prepared to adapt your strategy based on feedback, changing circumstances, or new information.
  - Persistence is key. Legislation often takes time to move forward, so continue advocating even if progress is slow.

The legislative process can be lengthy and sometimes frustrating, but your dedication and effort can lead to meaningful change. By following these steps and maintaining a strong and united advocacy effort, you can increase your chances of influencing California state legislation in a positive direction. Success may take more than one year to achieve.

## 4. The Positive Economic Impact of Military on Our Communities

Communities with a strong military presence have the financial benefit of stable revenue while communities with a dependency on travel, tourism, conventions and related spending face unprecedented revenue challenges for local government and citizens. You can reinforce the financial contribution of military salaries, spending and investment in your communities. A state impact report is available. Member organizations continue to assess their own communities.

## 5. Steps to forming your local community support group

Starting a non-profit advocacy organization to support your local military base and enhance community, political, and military cooperation is a commendable initiative. Here are the steps you can take to organize and create such an organization:

- **Define Your Mission and Goals:** Clearly articulate the purpose and objectives of your organization. Determine the specific areas of focus, such as community support, political advocacy, and military cooperation.
- **Conduct Research:** Gather information about the local military base, its needs, challenges, and current community initiatives. Identify key stakeholders, including military personnel, community leaders, and local politicians.
- **Legal Structure:** Decide on the legal structure of your non-profit. The most common options are a 501(c)(3) tax-exempt organization (which allows for tax-deductible donations) or a 501(c)(4) advocacy organization (which has more flexibility in lobbying and advocacy efforts). Aligning with an economic development agency or chamber of commerce could be possibilities.
- **Name Your Organization:** Choose a name that reflects the mission and purpose of your advocacy group. Ensure the name is unique and not already in use by another organization.

- **Draft Articles of Incorporation and Bylaws:** Create formal documents that outline the structure, purpose, and operating procedures of your organization. These documents are necessary for legal registration and governance.
- **Register Your Non-Profit:** File the necessary paperwork with your state's government office to officially register your non-profit organization.
- **Apply for Federal Tax-Exempt Status:** If you choose to go with a 501(c)(3) status, file for tax-exempt status with the IRS. This involves completing Form 1023 or the streamlined Form 1023-EZ.
- **Establish a Board of Directors:** Assemble a diverse board of individuals who are passionate about your mission and bring a range of skills and expertise. Ensure they understand their roles and responsibilities.
- **Develop a Strategic Plan:** Create a detailed plan that outlines short-term and long-term goals, along with specific strategies to achieve them. This plan should include fundraising, outreach, advocacy, and community engagement strategies.
- **Create a Budget:** Develop a budget that outlines expected expenses and potential sources of revenue. This will be crucial for managing your organization's finances and demonstrating financial responsibility.
- **Open a Bank Account:** Establish a separate bank account for your organization to keep its finances distinct from personal accounts.
- **Develop Programs and Initiatives:** Design programs and initiatives that align with your mission. This could involve community events, advocacy campaigns, workshops, and outreach efforts.
- **Build Partnerships and Collaborations:** Forge partnerships with local businesses, community organizations, and government agencies that share similar goals. Collaboration can amplify your impact.
- **Engage with the Community:** Actively involve the community in your initiatives. Seek feedback, hold public meetings, and encourage participation in your advocacy efforts. Encourage volunteers to assist the organization.
- **Compliance and Reporting:** Stay compliant with all legal and regulatory requirements. This includes filing annual reports, maintaining tax-exempt status, and fulfilling any other obligations.
- **Promote and Market Your Organization:** Use various communication channels (website, social media, newsletters) to raise awareness about your organization and its initiatives.
- **Evaluate and Adjust:** Regularly assess your organization's progress towards its goals. Be open to adjustments in strategies and programs based on feedback and changing circumstances.

Starting and running a non-profit organization requires dedication, organization, and perseverance. Seek advice from legal and financial professionals to ensure you're following all legal and financial best practices. Community members and volunteers may have insight into organizing and operating effective organizations.

## 6. Creating a 501(c)(4) organization

Creating a 501(c)(4) organization in California involves several steps, including the legal paperwork, filing with the appropriate authorities, and adhering to specific guidelines. Here is a step-by-step guide to help you get started:

- **Determine Eligibility:** 501(c)(4) organizations are social welfare organizations that primarily engage in promoting social welfare. This can include activities related to civic betterment, community development, and similar efforts.
- **Choose a Name:** Select a unique name for your organization. Ensure it complies with California's naming requirements.

- **Draft Articles of Incorporation:** Create a set of articles that outline the purpose, structure, and operations of your organization. Be sure to include language indicating that the organization is organized exclusively for social welfare purposes.
- **Appoint Directors and Officers:** Identify individuals who will serve as the initial board of directors and officers. Ensure they are committed to the organization's mission.
- **File Articles of Incorporation:** Submit the Articles of Incorporation to the California Secretary of State's office. You can do this online or by mail. There will be a filing fee associated with this process.
- **Draft Bylaws:** Develop a set of bylaws that will serve as the internal rules and procedures governing your organization's operations.
- **Hold an Organizational Meeting:** The initial board of directors should hold a meeting to adopt the bylaws, elect officers, and take care of any other necessary organizational matters. Encourage volunteers to assist the organization.
- **Apply for an EIN (Employer Identification Number):** Obtain an EIN from the IRS. This is a unique identification number that your organization will use for tax purposes.
- **File Form 1024:** This is the Application for Recognition of Exemption Under Section 501(c)(4) of the Internal Revenue Code. This form should be submitted to the IRS along with the appropriate filing fee.
- **Comply with State Requirements:** Register with the California Attorney General's Registry of Charitable Trusts. This is necessary for organizations soliciting charitable contributions in California.
- **Maintain Records and Compliance:** Keep thorough records of your organization's activities, financial transactions, and meeting minutes. Ensure compliance with both federal and state regulations.
- **File Annual Reports:** Submit the necessary annual reports to both the California Secretary of State and the IRS. This may include Form 990 or Form 990-EZ.
- **Fundraising Compliance:** If your organization engages in fundraising activities, ensure compliance with state and local regulations regarding charitable solicitations.
- **Stay Non-Partisan:** 501(c)(4) organizations can engage in some political activities, but it's important to understand and adhere to the guidelines regarding non-partisanship and lobbying.
- **Seek Legal and Financial Advice:** Consulting legal and financial professionals with expertise in non-profit organizations can provide valuable guidance throughout the process. Discuss with those who have recent experience with non-profits.

It's advisable to consult with legal and financial professionals who are familiar with California's laws and regulations pertaining to non-profit organizations. They can provide tailored advice based on your organization's specific circumstances.

## 7. Why Work Together? An argument for your participation in CDCA

When nonprofit organizations with similar goals work together through or belong to an umbrella organization, they can significantly enhance their effectiveness and impact. Here are several ways in which this collaboration can be advantageous:

- **Collective Strength:** By joining forces, nonprofit organizations can pool their resources, expertise, and networks, creating a more powerful collective voice. This strength allows them to advocate for their shared interests more effectively at the state level. Working together, they can pursue common goals, influence policies, and bring about meaningful change.
- **Amplified Advocacy:** An umbrella organization representing multiple nonprofits can consolidate their advocacy efforts. This centralization enables coordinated campaigns, lobbying initiatives, and public awareness campaigns, maximizing their impact on legislative decisions and public opinion.

Through joint efforts, these organizations can amplify their messages and create a stronger presence, leading to better outcomes.

- **Resource Sharing:** Collaborating nonprofits can share knowledge, best practices, and resources. They can exchange ideas, learn from each other's experiences, and avoid duplicating efforts. This synergy can result in more efficient use of limited resources, increased productivity, and improved program outcomes.
- **Enhanced Networking:** Belonging to an umbrella organization provides nonprofits with expanded networking opportunities. They can connect with like-minded organizations, government agencies, philanthropic foundations, and other stakeholders within the sector. This networking facilitates knowledge sharing, partnerships, and collaborations, fostering innovation and fostering collective problem-solving.
- **Increased Funding Opportunities:** An umbrella organization can help its member nonprofits access funding opportunities that may not be available to them individually. By combining their efforts, they can apply for larger grants, launch joint fundraising campaigns, and attract more significant financial support. Additionally, the umbrella organization can provide guidance and support in navigating the complex funding landscape.
- **Streamlined Operations:** Through collaboration, nonprofits can streamline their operations and reduce administrative burdens. They can share administrative tasks, such as accounting, legal compliance, and reporting, leading to cost savings and increased efficiency. This allows organizations to allocate more resources to their core mission and service delivery.
- **Collective Learning and Capacity Building:** By working together, nonprofits can engage in collective learning and capacity building initiatives. They can organize workshops, training programs, and conferences to enhance their skills and knowledge in areas relevant to their shared goals. This continuous learning improves the overall effectiveness and impact of the participating organizations.
- **Unified Messaging:** When multiple nonprofits unite under an umbrella organization, they can develop a unified messaging strategy. This ensures consistency and clarity in communicating their goals, values, and impact to stakeholders, including the public, policymakers, and donors. A coherent and well-coordinated message strengthens their advocacy efforts and enhances public trust and support.

Nonprofit organizations with similar goals can be more effective by working together through or belonging to an umbrella organization. This collaboration enables collective strength, amplified advocacy, resource sharing, enhanced networking, increased funding opportunities, streamlined operations, collective learning, and unified messaging. By harnessing these benefits, nonprofits can better represent their interests at the state level and achieve greater impact in pursuit of their shared goals.

## 8. CDCA Executive Board

In compliance with the CDCA Bylaws, the Board of Directors held an election of officers for the 2023/2024 fiscal year (July 1 to June 30). Board membership is comprised of one representative from each of the Community Support Organizations and Local Government Support Organizations. The officers of the corporation and board are the Co-Chairs, the Treasurer, and the Secretary. Due to the nature of the organization and corporation and the possible movement of people in leadership and within the membership groups, the Board of Directors has two co-chairpersons of equal status and responsibility for the purpose of continuity in the management of the corporation. The Executive Board members are the two Co-Chairpersons, Treasurer, Secretary, and two members appointed by the Board.

The Co-Chairs are Mark Balmert of SDMAC (July 2023-June 2025) and David Janiec of the China Lake Alliance (July 2022-June 2024) Treasurer is Sandy Person of Travis Community Consortium (July 2023-June 2025). Secretary is Gene Fisher of Regional Defense Partnership (July 2022-June 2024). Member at Large is Hans Uslar of Monterey Bay Defense Alliance. One Member at Large position is open.

## 9. CDCA points of contact

Feel free to contact the co-chairs, Mark Balmert of SDMAC and David Janiec of the China Lake Alliance.

The web site is [www.cadefensecommunitiesalliance.org](http://www.cadefensecommunitiesalliance.org). Twitter: @CaDefenseComm. (Take a look at these for the latest CDCA news.)

Mailing address is 1017 “L” Street #398, Sacramento, CA 95814

## 10. Tools and Resources

OLDCC California Spending

[https://oldcc.gov/sites/default/files/FY2021 Defense Spending\\_CA.pdf](https://oldcc.gov/sites/default/files/FY2021%20Defense%20Spending_CA.pdf)

California State Library report *2022 California Statewide National Security Economic Impacts Study*

[https://militarycouncil.ca.gov/wp-content/uploads/sites/81/2022/10/2022\\_California\\_Statewide\\_MEIS.pdf?emrc=59e8c8](https://militarycouncil.ca.gov/wp-content/uploads/sites/81/2022/10/2022_California_Statewide_MEIS.pdf?emrc=59e8c8)

California State Library *2022 Counties Supplement*

[https://opr.ca.gov/docs/20211208-2020\\_Counties\\_Supplement\\_CA\\_Statewide\\_National\\_Security\\_Economic\\_Impacts.pdf](https://opr.ca.gov/docs/20211208-2020_Counties_Supplement_CA_Statewide_National_Security_Economic_Impacts.pdf)

California Economic Data

[https://militarycouncil.ca.gov/s\\_economicdata/](https://militarycouncil.ca.gov/s_economicdata/)

California Legislation text and status

<https://www.legislature.ca.gov>

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## Membership

For membership, see the CDCA web site [www.cadefensecommunitiesalliance.org](http://www.cadefensecommunitiesalliance.org) or contact any Executive Board member. Community support organizations, local government support organizations and individuals may be members.

**New: Commercial Organization Membership:** Any businesses/commercial corporations that support the goals and purposes of CDCA can be a member of CDCA. There are no voting rights connected to this membership.

- Membership dues for these organizations are based on number of employees in California. Dues are established annually by the Executive Board prior to CDCA Fiscal year. There are four levels of dues based on organizations employees in California:
  - \$500.00 annually for Companies with ~50 or less employees
  - \$750.00 annually for Companies with ~500 or less employees
  - \$1200.00 annually for Companies with ~1000 or less
  - \$3000.00 annually for Companies with Greater than 1000.
- Benefits:
  - Participation in all CDCA Events.
  - Participation in planning sessions and goal setting meetings.
  - Ability to serve on advisory Committees.
  - Use of CDCA Logo in advertising their community support/outreach.
  - Receive CDCA Information and Newsletters.
  - Company logo on CDCA Website.

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## About CDCA

More than a dozen nonprofit organizations formed the California Defense Communities Alliance (CDCA) with the shared mission of supporting Department of Defense presence in communities throughout California while advocating on behalf of active duty and veterans in their communities. Organizations work together under the CDCA umbrella to advance collaboration and communication among the military, elected officials, and other community leaders to enhance an understanding of the many contributions Defense organizations make to California. CDCA mission is to support, promote, and represent the interests of our Defense Organizations throughout California while advocating on behalf of those that serve or have served in these organizations. CDCA will advance the collaboration and communication between the military, our elected and appointed officials, and our communities while working to enhance the recognition of the many contributions Defense Organizations make to California and our Nation.