

2022

IMPACT & BENEFIT REPORT

Meet the B Corp Committee

"The intersection of profit and public benefit that the B Corp captures should be the standard for all businesses. I am very honored and proud of the exceptional work this company has done over the years and the opportunity it affords team members to engage in meaningful and impactful work. It is wonderful to help convert interest into passion."

Yves M. Mombeleur
Advisor - B Corp Committee



"I had the incredible opportunity this year to Chair the Clearinghouse CDFI B Corp Committee. I got to work alongside a passionately dedicated team to make great strides in volunteerism and environmentalism in our company. I cannot wait to see what next year holds for us!"

Lacey Dixon
Chair - B Corp Committee



B Corp Committee

Lacey Dixon - CHAIR
Yves M. Mombeleur - ADVISOR
Allie Weber
Analisa Wells
Brian Sagert
Constantine Roqui
Donald Degollado
Gabriella Brusseau-Hale
Karyna Tafel
Kat Donovan
Lawrence Chavez
Lisa Van Ella
Melissa Johnson
Natasa Alexander
Susan Montoya

Certified



Corporation

"On behalf of the Board of Directors, I am pleased to announce that Clearinghouse CDFI has successfully pursued its general public benefit in material respects for 2022."

Gary Dunn
Chairman, Board of Directors

Check out the 2022 B Week Video!



B Impact Score

149.4

Environment 15.8
Customers 58.7
Governance 21.6
Workers 29.8
Community 22.0

Impact Awards

OC Civic 50

Recognized as one of the 50 most Community-Oriented Companies in Orange County, CA



Real Leaders Impact Awards

#10 in Financial Services and **#117** of **300** Overall in the 2023 Real Leaders Impact Awards



2022 B Champion



"It is a great honor to be named the 2022 B Champion. I've dedicated my career to advancing people and communities toward an equitable and inclusive economy, and that's what working for a B Corp is all about. What makes this recognition extra special is that the nomination and selection came from other purpose-driven individuals who also believe in using business as a force for good."

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-Susan Montoya
Congratulations, Susan, and thank you!

TOP WORK PLACES

#64 out of **169**

Companies Recognized as

Top Workplaces
in Orange County

Honored by **B Lab** as

"Best for the World"

for the **5th** Consecutive Award Year



Our Impact in 2022

\$182 Million

Total Project Financing in 2022

45

Total Projects Financed in 2022

64%

of 2022 Financing Benefits Projects in Low-Income Communities

16,660

Clients/Customers Served

2,686

African American Clients Served in 2022

7,868

Latino/Hispanic Clients Served in 2022

510

Native American / Native Alaskan Clients Served in 2022

11%

are Located in Non-Metropolitan Areas

23%

Median Poverty Rate of Projects

40%

are Minority Owned/Controlled OR Primarily Serving a Minority Population

1,580

Housing Units Developed, Rehabilitated, or Preserved in 2022

1,761

Jobs Created or Retained in 2022

81%

of Housing Units Created in 2022 are Designated Affordable

37%

of Jobs Created or Retained in 2022 are in High Unemployment Areas

Our Impact Since 1996

2,600+

Projects Funded Since Inception

40,000+

Jobs Created or Retained Since Inception

12,000 +

Affordable Housing Units Created Since Inception

3.9 Million

Total Clients/Customers Served Since Inception

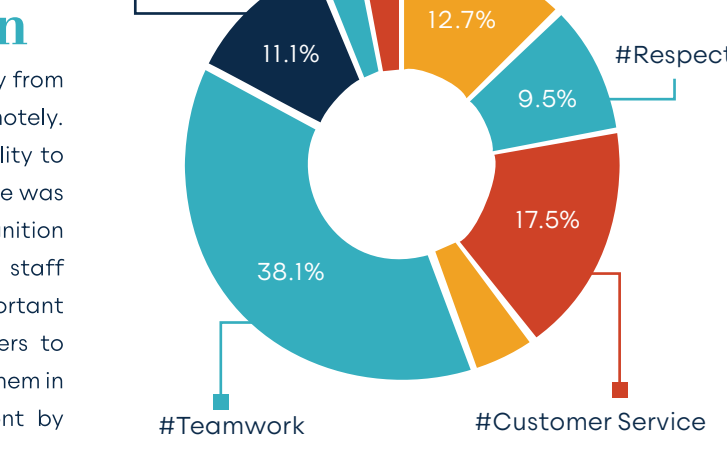
29

CDFI Fund Awards Received Totalling \$980 Million Since Inception

New in 2022

Nectar - Employee Recognition

Clearinghouse CDFI, like many other companies, has transitioned away from the traditional work environment to the majority of staff working remotely. One of the challenges management faced in this change was the ability to make meaningful connections internally with employees. That challenge was countered with the new implementation of Nectar - an employee recognition platform that was rolled out at the end of 2022. Through Nectar, staff members and managers are now able to give and receive the important recognition that drives team camaraderie. The platform allows users to participate in company volunteering challenges, earn points and cash them in for rewards, all while keeping our driving principals at the forefront by including them in shout out hashtags.



Charitable Contributions Supporting Sustainability

Total Charitable Contributions Since Inception

\$2.4 Million

2022 Total Charitable Contributions

\$181K

2022 Charitable Recipients

29

Youth and Family Services \$56,472
Shelter and Housing Programs \$61,054
Veteran/Military Organizations \$15,300
Health Services \$12,000
Native American Organizations \$25,000
Other Nonprofits \$11,896

Clearinghouse CDFI partnered with Lively Root to give board and committee members a unique holiday gift option—the gift of sustainability. With every plant purchased, Clearinghouse CDFI supported the reforestation of the Manchester State Forest in South Carolina, home to several threatened and endangered species. Lively Root's partnership with the Arbor Day Foundation is ongoing, and Clearinghouse CDFI is proud to be a part of this effort to solve critical issues such as climate change, air and water quality, poverty, hunger, and habitat destruction.



'B' BOLD™ | 'B' BOLD(ER) Internship Program

In 2022, we expanded our paid student internship program and launched 'B' BOLD(ER); Building Bridges through Outreach, Leadership, Development, Engagement, and Recruitment. The 8-week, summer cohort accepted two local high school students and three college students from California and Arizona, providing thought-provoking workshops, team-building exercises, and onsite partner experiences. Activities connected interns to new opportunities and business professionals, shaping the future of community development.

'B' BOLD Interns



Kimberly Santiago



Samantha Sarmiento

'B' BOLD(ER) Interns



Abigail Verdugo



Amayrani Tlatelpa



Fernanda Ortiz

Staff Volunteering Efforts

Clearinghouse CDFI staff committed **2.5%** of total working hours with over 50 Organizations or Nonprofits

2,457

Volunteer Hours

at

50+

Organizations

Top Volunteers

Hours

Kathy Bonney

728

Cesar Plascencia

333

Yves M. Mombeleur

249

Donald Degollado

140

Lisa Van Ella

140

