

ESTIMATE\*  
FILED

Form SFEC-3.216(d)  
Cover Page

2014 APR 16 PM 3:51

SAN FRANCISCO  
ETHICS COMMISSION

Please type or print legibly in ink.

<b>1. Information regarding Elected Officer:</b>			
Name (Last)	(First)	(Middle)	Daytime Telephone
Cisneros	José	Miguel	(415 ) 554-4479
Mailing Address	Street	Zip	Fax Telephone
1 Dr. Carlton B. Goodlett Place, Room 140		94102	(415 ) 554-5507
Office Held	Email Address		
Treasurer	jose.cisneros@sfgov.org		

**2. Purpose of Travel:**  
Corporation for Enterprise  
Development's Children's Savings  
Conference.

**4. Schedule Summary:**  
Total number of pages, including this  
cover page \_\_\_\_\_  
*Check applicable schedules:*  
**Schedule A**  **Yes – schedule attached**  
*Gift of transportation, lodging or subsistence*  
**Schedule B**  **Yes – schedule attached**  
*Gift to the City of transportation, lodging or  
subsistence*  
**Schedule C**  **Yes – schedule attached**  
*Reimbursement to the City of gift of transportation,  
lodging or subsistence*

**3. Dates of Travel and Itinerary:**

04/28/14	San Francisco, CA to Washington, DC
Month/Day/Year	City, State, Country
04/30/14	Washington, DC to San Francisco, CA

**5. Verification:**  
I have used all reasonable diligence in preparing this  
statement. I have reviewed this statement and to the  
best of my knowledge, the information contained  
herein and in any attached schedules is true and  
complete.  
**I certify under penalty of perjury under the laws  
of the State of California that the foregoing is true  
and correct.**  
Date signed 04/16/14  
Signature \_\_\_\_\_

**Form SFEC-3.216(d)**  
**Schedule A – Gifts of Travel**

**1. Information regarding entity funding gift of transportation, lodging or subsistence**

Full Name of Entity:  
Corporation for Enterprise Development

Address:  
Washington DC 20005  
Street City State Zip

Name of Contact Person:  
Shira Markoff

Email Address: smarkoff@cfed.org Telephone: (202) 207-0141

**3. Cost of transportation, lodging or subsistence**

A. Please list the total amount of costs that will be paid by the entity to fund the elected officer's travel, including but not limited to the amount directly related to the cost of the officer's transportation, lodging and subsistence.  
\$ 900.00  
ESTIMATE\*

B. Please list the amount in Item A that is directly related to the cost of the officer's transportation, lodging and subsistence.  
\$ 900.00

**2. Information regarding contributors who contributed more than \$500 to the entity to fund the trip**

Please list the name, occupation and employer of any contributor who contributed more than \$500 to the entity funding the trip and whose contributions were used in whole or in part to fund the trip:

Name of Contributor \_\_\_\_\_  
Occupation of Contributor \_\_\_\_\_  
Employer of Contributor \_\_\_\_\_

Name of Contributor \_\_\_\_\_  
Occupation of Contributor \_\_\_\_\_  
Employer of Contributor \_\_\_\_\_

Name of Contributor \_\_\_\_\_  
Occupation of Contributor \_\_\_\_\_  
Employer of Contributor \_\_\_\_\_

Check box if additional schedules are attached.

**4. Information regarding persons accompanying the elected officer**

Please list the name of any individual who is

(a) a City employee required to file a Statement of Economic Interests,  
(b) a lobbyist or campaign consultant registered with the Ethics Commission;  
(c) an employee of or individual who has an ownership interest in a lobbyist or campaign consultant registered with the Ethics Commission; or  
(d) an employee or officer of the entity that will pay for the gift of transportation, lodging or subsistence, and  
who is accompanying the elected officer on the trip.

Please identify whether the individual is category (a), (b), (c), or (d), as described above.

Name of Individual	Category
_____	_____
_____	_____

Check box if additional schedules are attached.

\*ESTIMATED expenses; AMENDED filing to be submitted upon return.

## Nichelson, Monica (TTX)

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**Subject:** Children's' Savings Conf  
**Location:** DC  
  
**Start:** Tue 4/29/2014 12:00 AM  
**End:** Thu 5/1/2014 12:00 AM  
**Show Time As:** Out of Office  
  
**Recurrence:** (none)  
  
**Meeting Status:** Meeting organizer  
  
**Organizer:** Cisneros, Jose  
**Required Attendees:** Phillips, Leigh

## At-a-Glance Agenda

This agenda is subject to change.

### Tuesday, April 29, 2014

**7:30 am Registration Opens**  
**7:30 am Breakfast Buffet**  
**8:30 am Opening Plenary: State of the Field**  
**10:00 am Concurrent Sessions I**

- Children's Savings 101: Designing and Implementing a Successful Program
- Setting the Agenda: Establishing a National Framework for Children's Savings

**12:00 pm Luncheon Plenary: Public Sector Champions for Children's Savings**  
**2:00 pm Concurrent Sessions II**

- Effective Strategies for Boosting Family Participation
- Cultivating a Children's Savings Marketplace: Perspectives on Designing and Scaling Products
- Beyond the Classroom: Education Systems as a Platform for Children's Savings

**4:30 pm Roundtables**  
**5:30 pm Reception**

### Wednesday, April 30, 2014

**7:30 am Registration Continues**  
**7:30 am Breakfast Buffet**  
**8:30 am Morning Plenary: Conversation with Account Holders**  
**10:15 am Concurrent Sessions III**

- From Aspiration to Policy Adoption: Making Children's Savings a Winning Issue
- Building Hope for the Long-term: Creating Sustainable Funding Strategies for the CSA Field
- Gateway to Economic Security: Addressing the Needs of Vulnerable Children and Parents

**12:30 pm Closing Plenary: A Roadmap to Reach Scale**  
**2:00 pm Conference Ends**

**From:** Phillips, Leigh  
**Sent:** Tuesday, March 04, 2014 12:07 PM  
**To:** Ng, Kristina; Liu, Annie; Cisneros, Jose; Nicholson, Monica  
**Subject:** FW: OFE role in upcoming conference

This is for the CSA conference April 28-30. I will confirm dates.

thanks

Leigh Phillips  
Director, Office of Financial Empowerment  
Office of the Treasurer & Tax Collector

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**From:** Kim Pate [<mailto:Kim@CFED.org>]  
**Sent:** Tuesday, March 04, 2014 12:01 PM  
**To:** Shira Markoff; Phillips, Leigh  
**Cc:** Leigh Tivol; Dominique Derbigny; Andrea Levere  
**Subject:** RE: OFE role in upcoming conference

Hi Leigh,

I will handle your travel and lodging, just email me separately with the full names of the travelers, dates of birth and days of travel.

Kim

**From:** Shira Markoff  
**Sent:** Tuesday, March 04, 2014 2:34 PM  
**To:** Phillips, Leigh  
**Cc:** Leigh Tivol; Dominique Derbigny; Andrea Levere; Kim Pate  
**Subject:** RE: OFE role in upcoming conference

Hi Leigh,

Thank you for reaching out. You were on my list for today to email – you just beat me to the punch! I apologize in advance that this is going to be a long email, though chock full of exciting opportunities for OFE staff to take on roles at the conference.

Based on our conversation a few weeks ago, Treasurer Cisneros is confirmed for the plenary session on public sector leaders in children's savings. Also, you had suggested Annie Liu for a concurrent (breakout) session on boosting participating in children's savings programs. I've included the session description below. Please confirm if you believe she is the best person from K2C for that role.

In addition, we are excited to offer you an invitation to speak in the opening plenary session, which will focus on the state of the children's savings field. Andrea will be facilitating this section, and we would like to have you briefly talk

about the state of the field from the program/practice perspective. Since K2C is a leader and pioneer in the field, we can think of no one better to take on this role. We will also have someone from the research, and potentially the funder, perspective give their take on the state of the field. Please confirm that you would like to speak in this plenary. Andrea will be in touch within the next few weeks with more details, but if you have any questions in the meanwhile, I am happy to discuss it further.

We also have two other roles for either you or one of your colleagues:

- 1) We will be holding a Children's Savings 101 session covering the nuts and bolts of program design and implementation for attendees who are newer to the field. It would be great to have someone share K2C's wealth of experience in this area with the group. Are you, or another member of your team, interested in this role?
- 2) We will be holding smaller roundtable discussions on the first afternoon to go into more depth in particular areas. One of the roundtables is on the children's savings research agenda. Specifically, this will be an opportunity for researchers and practitioners (and other interested parties) to discuss what research and evaluation is needed to move the field forward and expand children's savings programs and policies. During our call a few weeks ago, we discussed the possibility of you co-facilitating this session with a researcher. Is this still something you are interested in doing?

I've included descriptions for all of the sessions discussed below. If you have any questions on these, please feel free to reach out to me. Also, Kim Pate will be in touch soon regarding booking your travel.

Thank you for your help in making this an excellent conference!

Shira

"Opening Plenary: State of the Field" (working title)

The opening plenary will set the stage for the focus of the conference on examining barriers to and opportunities for advancing children's savings and moving towards scale. We will open with a retrospective on the progress in the field since the last conference 5 years ago, and then have prominent leaders in the field present on the current state of the field. We plan to end the session with a keynote address by a prominent leader who will discuss how children's savings help promote equality of opportunity and educational achievement for low- and moderate-income children.

Confirmed Speakers: Andrea Levere, Paula Sammons (W.K. Kellogg Foundation)

Invited Speakers: Secretary Arne Duncan, Leigh Phillips, Willie Elliot, others TBD

"Public Sector Champions for Children's Savings" (working title)

This plenary will focus on opportunities for expanding children's savings through the public sector. Top public sector leaders will discuss how and why they have promoted CSAs in their states/cities and what they see as the best opportunities for further expansion.

Confirmed Speakers: Jose Cisneros, Reggie Bicha

Invited Speaker: Ed FitzGerald, Cuyahoga County Executive

Moderator: Deborah Wilds, College Success Foundation

"Boosting Participation in Children's Savings Programs" (working title)

Session Description: One of the key challenges for children's savings programs is savings participation. The session will explore various strategies – including messaging and incentives – for engaging children and families in savings programs and boosting savings participation from a practice, research and policy perspective.

Invited Speakers: Annie Liu; Amanda Hahnel (D2D)

"Children's Savings 101: Designing and Implementing an Impactful Program" (working title)

Targeted towards attendees that are new to the children's savings field or are interested in starting up a children's savings program, this session will focus on the nuts and bolts of designing and implementing a children's savings

programs. Topics include: partnering with financial institution, savings incentives, financial education and custodial accounts.

Moderator: Shira Markoff

**From:** Phillips, Leigh [<mailto:leigh.phillips@sfgov.org>]  
**Sent:** Tuesday, March 04, 2014 1:53 PM  
**To:** Shira Markoff  
**Subject:** OFE role in upcoming conference

Hello Shira – I am wondering if we need to have another conversation about our role in the CSA conference. Have you thought anymore about which panels we can best help with? In addition to myself and Jose, our OFE Coordinator and K2C Outreach Coordinator will also be joining us.

Please let me know your thoughts. Liz Coit also mentioned that someone would be in touch regarding our travel.

Thanks

Leigh Phillips  
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**From:** Andrea Levere [<mailto:alevere@cfed.org>]  
**Sent:** Tuesday, December 17, 2013 1:25 PM  
**To:** Cisneros, Jose; Phillips, Leigh  
**Cc:** Susan Krupka; Shira Markoff; Nicholson, Monica  
**Subject:** A special invitation to the 2014 Children's Savings Conference on April 29-30 in DC

Dear Jose and Leigh,

Greetings! As two of the leaders of the children's saving field in the nation, it is my pleasure to inform you that CFED will be holding the first national CSA conference in nearly five years this spring, entitled 2014 Children's Savings Conference: From Aspirations to Achievement. It will be from April 29-30 at the Omni Shoreham Hotel in Washington, DC. Given your singular roles in the field, and our interest in engaging both you in the program, we wanted to personally reach out to ask you both to save the dates for the conference so that we can ensure your attendance.

In addition, as we are beginning the process of developing the conference program, we would greatly value your advice and feedback on the conference goals and topics, as well as your ideas for plenaries, sessions and speakers—including roles that you can play in the event. Can we set up a time to speak by phone after the holidays? My assistant, Susan, will reach out to directly to find a mutually convenient time.

In the meanwhile, I have attached a one-page overview of the conference for your reading pleasure. Thank you in advance for your assistance in making this a great conference, and I see great things ahead as we work together. Happy holidays!

All my best,

Andrea

Andrea Levere

President

CFED - Expanding Economic Opportunity

Washington, DC 20005

202.207.0128 (direct)

[alevere@cfed.org](mailto:alevere@cfed.org)

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