

FILED

AMENDED

2014 MAY -5 AM 8: 22

RECEIVED BY EMAIL 5.2.14

SAN FRANCISCO ETHICS COMMISSION

Form SFEC-3.216(d) Cover Page

Please type or print legibly in ink.

BY _____

1. Information regarding Elected Officer:

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 _____

Signature 

AMENDED

FILED

2014 MAY -5 AM 10:19

SAN FRANCISCO ETHICS COMMISSION

Form SFEC-3.216(d) Cover Page

Please type or print legibly in ink.

BY _____

1. Information regarding Elected Officer:			
Name (Last)	(First)	(Middle)	Daytime Telephone
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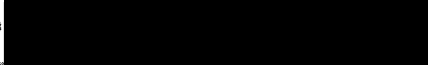
3. Dates of Travel and Itinerary:

04/28/14	San Francisco, CA to Washington, DC
<small>Month/Day/Year</small>	<small>City, State, Country</small>
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 5/2/14

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:
1200 G St. NW/400 Washington DC 20005

Street City State Zip

Name of Contact Person:
Shira Markoff

Email Address: Telephone:
smarkoff@cfed.org (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.
\$1,525.58

B. Please list the amount in Item A that is directly related to the cost of the officer's transportation, lodging and subsistence.
\$1,525.58

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.



LIVING CITIES
RECONSTRUCTING THE FUTURE

New York, New York 10018

Participant Name: José Cisneros

Check Payable To (If different from above): _____

Mailing Address: 1 Dr. Carlton B. Goodlett Place
City Hall Room 140
San Francisco, CA 94102

CFE Coalition
Children's Savings Conference, Washington, DC
April 29 - 30, 2014

Expense Category (Use Code key below)	Date of Expense	Amount Spent	Itemized Receipt? Y or N	Meeting Attended	Description of Expense
A	4/28/2014	\$ 819.00	Y	Children's Savings Conf. 2014	Airfare SFO-IAD (round trip)
O	4/28/2014	\$ 257.63	Y	Children's Savings Conf. 2014	Lodging
T	4/28/2014	\$ 11.00	Y	Children's Savings Conf. 2014	Taxi
F	4/28/2014	\$ 10.98	Y	Children's Savings Conf. 2014	Meal
T	4/28/2014	\$ 74.50	Y	Children's Savings Conf. 2014	Taxi
F	4/28/2014	\$ 7.99	Y	Children's Savings Conf. 2014	Meal
O	4/29/2014	\$ 257.63	Y	Children's Savings Conf. 2014	Lodging
T	4/29/2014	\$ 10.44	Y	Children's Savings Conf. 2014	Taxi
T	4/30/2014	\$ 78.41	Y	Children's Savings Conf. 2014	Taxi
Less: Prepaid by Living Cities					
TOTAL:		\$ 1,525.68			

Submitted By: Lionica Nicholson

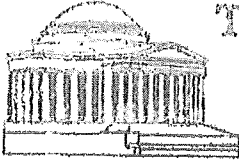
Date: 5/2/2014

LC Acct Review: _____

Date: _____

Code Key: A=airfare; F=food; T=taxi; M=mass transit/metro; P=parking; TR=train; O=other
 Form last revised June 2013

Accounting Department:
Committee/Project Code: _____
Sub-class: _____
Account Number: _____
Contract or Grant Number: <u>N/A</u>



TAXICAB RECEIPT

Time: _____
Date: 4/28/14

Origin of trip: Union Station

Destination: 1400 M St NW

Fare: 11.00 Sign: [Signature]

UNITED

04/28/2014
UA0400 SFO-1A0
Device ID G.X00042225

Receipt #: 0011
Transaction: 14042811565942225

Sale

Product	Price	Qty	Amt.
Energy	6.99	1	6.99
FOOD&BEV	3.99	1	3.99
Total	USD		10.98
VISA 8522	USD		10.98

DIAMOND CAB
(202)387-6200

MERCHANT COPY
----- TEAR HERE -----
CUSTOMER COPY

UNITED

04/28/2014
UA0400 SFO-1A0
Device ID G.X00042225

Receipt #: 0035
Transaction: 14042813264512225

Sale

Product	Price	Qty	Amt
Classic 2	7.99	1	7.99
Total	USD		7.99
VISA 8522	USD		7.99

CREDIT RECEIPT

DRIVER: 00077512
CAB #: A422
DATE: 04/29/14
Time?: 23-07:33
RATE #: 1
STANDARD RATE
Miles R1: 1.95
TRIP #: 1041
FARE: \$9.19
SURCH.: \$0.25
TIPS: \$1.00
Total: \$10.44
#Passengers: 01
AMEX ***1000
AUTHOR.: 543661

Luxury Cab
Washington, DC
(202) 269-1100
Plate# H95243

Trx: 624116
ANEX 1008
Acrv: 503317
Customer
Start Time
04/30/14 15:00
End Time
4/30/14 15:53
Dist: 27.8 mi
Fare: \$66.16
Extras: \$0.25
Tip: \$10.00
Total: \$76.41

Washington Flyer
CAB-DR ID 463-60547
2014-04-28 17:30
3857205, -7726952

2014-04-28 18:32
3853521, -7700340

DISTANCE 29.50
FARE \$65.50
TIP \$9.00
TOTAL \$74.50

Paid By:
AMERICAN EXPRESS
3728XXXXXXXX1000

THANK YOU
CALL AGAIN
(703) 224-2022

DCTC COMPLAINTS
LINES TTY 711
PH: 855-484-4966
dctaxi.dc.gov



Jose Cisneros <[REDACTED]>

eTicket Itinerary and Receipt for Confirmation C4MM90

1 message

United Airlines, Inc. <unitedairlines@united.com>
To: [REDACTED]

Wed, Apr 16, 2014 at 10:08 AM

UNITED



A STAR ALLIANCE MEMBER

Confirmation:
C4MM90
Check-in >

Issue Date: April 16, 2014

Traveler CISNEROS/JOSEMMR	eTicket Number 0162404724452	Frequent Flyer UA-AJ34XXXX Premier Gold / *G	Seats 21C/8B
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FLIGHT INFORMATION

Day, Date	Flight	Class	Departure City and Time	Arrival City and Time	Aircraft	Meal
Mon, 28APR14	UA400	E	SAN FRANCISCO, CA (SFO) 8:30 AM	WASHINGTON, DC (IAD - DULLES) 4:35 PM	757-200	Purchase
Wed, 30APR14	UA644	W	WASHINGTON, DC (IAD - DULLES) 4:55 PM	SAN FRANCISCO, CA (SFO) 7:59 PM	757-200	Purchase

FARE INFORMATION

Fare Breakdown		Form of Payment:
Airfare:	741.40USD	AMERICAN EXPRESS
U.S. Federal Transportation Tax:	55.60	Last Four Digits 1008
U.S. Flight Segment Tax:	8.00	
September 11th Security Fee:	5.00	
U.S. Passenger Facility Charge:	9.00	
Per Person Total:	819.00USD	
eTicket Total:	819.00USD	

The airfare you paid on this itinerary totals: 741.40 USD

The taxes, fees, and surcharges paid total: 77.60 USD

Fare Rules: Additional charges may apply for changes in addition to any fare rules listed.

NONREF/OVALUAFTDPT/CHGFEE

Cancel reservations before the scheduled departure time or TICKET HAS NO VALUE.

Additional Baggage Information

Carry-on baggage information

The Westin Washington, D.C. City Center

Washington, DC 20005
202-429-1700

<http://www.westinwashingtondcccitcenter.com>



Cisneros, Jose	Page Number	1	Invoice Nbr	1000086001
Ibm/global/gp	Guest Number	645770	Arrive Date	04-28-2014 20:04
	Folio ID	A	Depart Date	04-29-2014 14:47
San Francisco, CA	No. Of Guest	2	Agent	BSAINE
94117-4113	Room Number	1219		
	Time	04-29-2014 14:50		

Invoice

Date	Reference	Description	Charges	Credits
04-28-2014	RT1219	Room Charge	\$225.00	
04-28-2014	RT1219	Room Tax	\$32.63	
04-29-2014	AX	American Express		\$-257.63
	** Total		\$257.63	\$-257.63
	** Balance		\$0.00	

For Authorization Purpose Only

Jose Cisneros

Date	Credit Card	Code	Authorized
04-28-2014	XXXX1000	148482	295.80

0.00
0.00
0.00
0.00
0.00

As a Starwood Preferred Guest you have earned at least 675 Starpoints for this visit P400019787

Thank you for choosing Starwood Hotels We look forward to welcoming you back soon!

Tell us about your stay. www.westin.com/reviews

The Westin Washington, D.C. City Center

Washington, DC 20005
202-429-1700

<http://www.westinwashingtondccitycenter.com>



Cisneros, Jose	Page Number	1	Invoice Nbr	1000086092
Ibm/global/gp	Guest Number	645768	Arrive Date	04-29-2014 14:48
	Folio ID	A	Depart Date	04-30-2014 16:23
San Francisco, CA	No. Of Guest	2	Agent	MAHOLT
94117-4113	Room Number	1219		
	Time	04-30-2014 16:30		

Invoice

Date	Reference	Description	Charges	Credits
04-29-2014	RT1219	Room Charge	\$225.00	
04-29-2014	RT1219	Room Tax	\$32.63	
04-30-2014	AX	American Express		\$-257.63
		** Total	\$257.63	\$-257.63
		** Balance	\$0.00	

For Authorization Purpose Only

CISNEROS, JOSE

Date	Credit Card	Code	Authorized
04-29-2014	XXXX1008	103735	295.88

0.00
0.00
0.00
0.00
0.00

As a Starwood Preferred Guest you have earned at least 675 Starpoints for this visit P400019787

Thank you for choosing Starwood Hotels We look forward to welcoming you back soon!

Tell us about your stay. www.westin.com/reviews

Nichelson, Monica (TTX)

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

San Francisco, CA 94103
Tel: (415) 554-4320
Fax: (415) 554-7316
www.sfofe.org

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 Hannel (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
Director, Office of Financial Empowerment
Office of the Treasurer & Tax Collector
[REDACTED]
San Francisco, CA 94103
Tel: (415) 554-4320
Fax: (415) 554-7316
www.sfofe.org

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

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