

Form SFEC-3.216(d)  
Cover Page

2014 JUN -4 PM 4: 36

SAN FRANCISCO  
ETHICS COMMISSION

Please type or print legibly in ink.

<b>1. Information regarding Elected Officer:</b>			BY _____
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:**

1. Meeting at Boston Federal Reserve Bank.
2. Meeting at Brandeis University, Boston.

**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:**

06/08/14	San Francisco, CA to Boston, MA
Month/Day/Year	City, State, Country
06/10/14	Boston, MA to New York, NY

**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 06/04/14

Signature \_\_\_\_\_



## Nichelson, Monica (TTX)

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**Subject:** Boson CFE  
**Location:** Federal Reserve Bank of Boston, [REDACTED]

**Start:** Mon 6/9/2014 12:00 AM  
**End:** Tue 6/10/2014 12:00 AM  
**Show Time As:** Out of Office

**Recurrence:** (none)

**Organizer:** Cisneros, Jose (TTX)

See attachment:

**From:** Poore, Anthony [mailto:anthony.poore@bos.frb.org]

**Sent:** Friday, May 23, 2014 11:29 AM

**To:** Nichelson, Monica (TTX); Cisneros, Jose (TTX)

**Cc:** Carbonell, Sol; Poore, Anthony

**Subject:** Follow up from today's call

Dear Treasurer Cisneros (Jose'),

Thank you for taking the time to speak with me today. I deeply appreciate the time and the candid nature of our discussion. I included in the body of this email the talking points from today's briefing. I have also attached an update on the progress of our New England States specific to Children's Savings Accounts.

If I can be of service in anyway, please do not hesitate to call or email. I'm excited about our meeting and the exchange between people so deeply committed to impacting the lives of low and moderate income families in a positive and meaningful manner.

### New England CSA Roundtable

**Date:** Monday, June 9<sup>th</sup>

#### **Agenda**

- 10:30 – 12 pm (Meeting)
- 12 – 1pm (Lunch)
- 1 – 2pm (New England Consortium Debrief)

#### **Who's in the Room (10-11 folks/5 New England States)**

- NH State Rep./Education Committee Chair – Mary Gile
- NH State Rep./Member of CSA Legislative Study Committee – TBD
- Harold Alfond College Challenge – Colleen Quint
- RI Higher Education Assistance Authority – Gail Mance Rios
- RI Treasurer's Office – Heather Hudson
- RI Community Foundation/FRBB CDAC Member – Adrian Boney
- RI Community Foundation (Education Program Officer) – Toby Shepherd
- Opportunities Credit Union/FRBB CDAC Member - Cheryl Fatnassi
- Governor Malloy's Office (CT) – Kerry Kelley

### Where do their interests lie?

- Financial Education/Capabilities Training
  - General Organizational Structure & Related Program Elements
  - How is Financial Capabilities delivered & how are its outcomes evaluated?
  - Types of Financial Capabilities/Education Partners the program works with
  - Sources and Uses of Capital for Financial Capabilities Training
  - Anything and everything they need to learn about the inclusion of Financial Capabilities Training as part of their state's CSA Program
- How best to navigate State/Municipal government environments when advancing the CSA concept?
- How did he make non-believers into believers absent long-term longitudinal data?

### Next Steps

- Confirm those who will be in attendance and request from all attendees they submit 2-3 question in advance for Jose to consider prior to coming to Boston (effective and efficient use of time)
- Once received, I will forward all questions to Jose' no later than June 2<sup>nd</sup>

**Anthony S. Poore, Community Development Manager**  
Federal Reserve Bank of Boston

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**From:** Carbonell, Sol [<mailto:sol.carbonell@bos.frb.org>]  
**Sent:** Thursday, May 08, 2014 1:49 PM  
**To:** Jonathan Mintz  
**Cc:** Phillips, Leigh (TTX); Cisneros, Jose (TTX); Nichelson, Monica (TTX)  
**Subject:** RE: Connecting to Boston

I have confirmation for **June 9<sup>th</sup> from 1-3 pm**. Please let me know if that still works. John Barros, Chief of Economic Development for the City of Boston, will determine if other key staff from the Mayor's office or City needs to be present.

Johnathan & Leigh, can the three of us talk about what the agenda would look like and the kind of background materials that might be needed to make sure we use our in-person time more efficiently?

The meeting will take place here at the Boston Fed, 600 Atlantic Avenue. I can confirm later on if any other Fed officers will be in attendance. I am excited to be hosting you all to discuss municipal strategies for financial empowerment. There is so much potential in Boston. I appreciate you taking the time to come here to have a stimulating conversation and share your insights with the City.

Sol

## **Nichelson, Monica (TTX)**

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**Subject:** 8am: Tom Shapiro/Brandeis  
**Location:** Sebastian's, Main & Ames Street in Kendall Square in Cambridge

**Start:** Tue 6/10/2014 8:00 AM  
**End:** Tue 6/10/2014 9:30 AM  
**Show Time As:** Out of Office

**Recurrence:** (none)

**Organizer:** Cisneros, Jose (TTX)

**From:** Thomas Shapiro [mailto:tshapiro@brandeis.edu]  
**Sent:** Friday, May 30, 2014 9:54 AM  
**To:** Nichelson, Monica (TTX)  
**Subject:** Re: K2C research follow-up

Hi Monica,

That works fine for me.  
Looking forward to meeting Jose again, Sebastian's, 8:00, 10 June.  
best,  
tom

**From:** Phillips, Leigh (TTX)  
**Sent:** Tuesday, May 20, 2014 5:02 PM  
**To:** Thomas Shapiro; Janet Boguslaw  
**Cc:** Cisneros, Jose (TTX); Nichelson, Monica (TTX); Ng, Kristina; Liu, Annie (TTX)  
**Subject:** K2C research follow-up

Hello Tom,

Thanks so much for taking the time to visit us in San Francisco today. I hope you could sense our enthusiasm for really getting some solid research and evaluation underway for K2C and the CSA field.

I have cc'ed Monica Nichelson on this email. Monica manages José's schedule and will be able to coordinate a meeting in Boston on June 10<sup>th</sup>.

I will follow up with Frank DeGiovanni and let him know about our conversation and intention to meet to discuss strategy in the next few months.

I also want to let you know about my availability and schedule over the next few weeks. I am on vacation May 26 to June 6<sup>th</sup>. I am then back for two weeks and then out on medical leave (orthopedic and not serious but will have me off my feet, literally) for at least two weeks starting June 20<sup>th</sup>, potentially longer. I anticipate working during my leave but will be less available. I will also be unable to travel in July and August.

I have also cc'ed Annie Liu and Kristina Ng from the K2C team. They will be able to answer any questions on the program and provide any data as needed if something comes up during my absence.

Best wishes,

Leigh

Leigh Phillips  
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## Nichelson, Monica (TTX)

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**Subject:** 11a EST: DCA Commissioner Julie Menin  
**Location:** Department of Consumer Affairs, [REDACTED] New York, NY 10004 / Commissioner's Office

**Start:** Wed 6/11/2014 8:00 AM  
**End:** Wed 6/11/2014 9:00 AM

**Recurrence:** (none)

**Meeting Status:** Accepted

**Organizer:** Menin, Julie (DCA)  
**Required Attendees:** jose.cisneros@sfgov.org; Nichelson, Monica (TTX)  
**Optional Attendees:** Hernandez, Luis (DCA)

DCA's address is [REDACTED] New York, NY 10004. The cross streets are Exchange Place and Morris Street, the nearest trains are: R to Rector Street or Whitehall, #4 or #5 to Wall Street or Bowling Green, #1 to Rector Street.