Withdrawal/Redaction Sheet
Clinton Library

DOCUMENT NO. AND TYPE	SUBJECT/TITLE	DATE	RESTRICTION
001. email	From Jonathan A Kaplan To Melissa G Green [page 1 withdrawn in whole] (1 page)	04/26/1999	P5
002. email	From Cheryl M Carter To Jonathan A Kaplan [partial] (1 page)	04/29/1999	P5

COLLECTION:

Clinton Presidential Records
Policy Development
Lisa Green
OA/Box Number: 20588

FOLDER TITLE:

CEO Roundtable

2012-0043-S
ms431

2MPT

LG/SR/JK

This letter is too much about endorsing our specific legislative initiative. It needs to be more about mobilizing America to invest in underserved America + one trip to discover "New Markets." It also stresses Bipartisanship. Remember -- we are trying to mobilize CEOs -- not Pass Congress -- it must be a broader appeal not just an appeal to endorse a specific Clinton initiative.
GS 4/27/99

Lisa Green
04/26/99 04:53:48 PM

Record Type: Record

To: Jonathan A. Kaplan/OPD/EOP@EOP, Sarah Rosen/OPD/EOP@EOP, Melissa G. Green/OPD/EOP@EOP

cc:

Subject: New Markets Roundtable and Trip Meeting

invite letter-for NM trip.d

Toay's trip meeting was very brief (Cheri Carter, Laura Graham, Alvin Brown, and Lynn Cutler attended) and is being rescheduled for tomorrow. In a nutshell we covered the following in 5 minutes:

Location: No new information was provided regarding specific site possibilities. I will touch base with Alvin and Lynn shortly. They were tasked with developing recommendations for specific sites in Columbia versus Miami. As you know, we are now down to a one-city trip, based on Scheduling's feedback. The sense I got is that the group is now more likely to do Miami, because as we have pointed out, there are very few if any tangible examples of success in Columbia yet. I will report back after talking with Alvin and Lynn.

Agenda: The planned agenda was summarized

Early Morning Roundtable (hopefully 8:30 or 9:00) - Breakfast w/CEOs only
Rose Garden Announcement - President, CEOs and possibly members
Trip to Miami or Columbia - President, CEOs (probably only 5 or 6 CEOs will travel with the President), possibly members, and Jackson

Legislative Follow-up: I was tasked with followup on the legislative affairs front. If we invite members to the Rose Garden Announcement what role would/could they have? If we invite them, how many can we expect to show (given that Wednesday is a heavy voting day)? Should we plan on a separate legislative rollout involving Rangel and other sponsors or can/should the legislative piece be incorporated into the Roundtable/Rose Garden announcement? Will any members want to come on the trip? Should they be invited regardless? I will coordinate with Roger and Broderick to come up with recommendations for tomorrow.

If will be very difficult to control

Jackson: It is my understading that Gene and Minyon are calling Jackson this evening. It would be helpful for tomorrow's meeting to get an update once that call takes place .

Lastly, OPL wants to send out invitation letters (under Gene's signature) tomorrow as a followup to CEO calls being made today and tomorrow. Attached is a draft for Gene's review.

Melissa, please see if Gene will sign off on this letter for distribution to all of the invited CEOs. Note that this is a draft and I have inserted comments in brackets, based on feedback from Jon and Sarah.

DRAFT!!! DRAFT!!! DRAFT!!! DRAFT!!! – as of 4/26/1999, 4:30 PM

Dear CEO,

On the morning of May 5, 1999 the White House will host a roundtable with CEOs from across the United States to discuss corporate America's role in revitalizing underservered communities. I am pleased to invite your participation in this event. The meeting will include a discussion of the Administration's recent work on a set of initiatives, known collectively as the New Markets Initiative, designed to spur new investment in urban and rural areas. We would like you to join us following the roundtable as the President makes an announcement in the Rose Garden about his plans to visit New Markets in July. You are also invited to accompany the President on Air Force one for a brief visit to Miami, Florida where we will meet with local businesses to highlight investment potential in untapped and underserved markets. [Columbia, South Carolina is still a possibility --- still no final decision on Miami versus Columbia, but we are down to one city based on scheduling's position that two cities are not feasible.]

We are currently experiencing the longest peacetime economic expansion in history, marked by tremendous business and job growth. Despite this economic boom, many urban and rural areas of the country have not participated in the capital investment that has spurred job growth and economic development elsewhere at home and abroad. President Clinton's commitment to building one America is a commitment to making progress for all Americans, in every home and community in the nation. The President's FY 2000 balance budget contains tax incentives and new investment programs modeled after existing successful programs like the SBIC (Small Business Investment Companies) program administered by the Small Business Administration and OPIC (the Overseas Private Investment Corporation).

[Gene: Jon suggests that we leave this paragraph out, as it will leak]. After meeting with the President, participants in the roundtable will be asked to join us in the Rose Garden to announce an unprecedented domestic trip scheduled for July 1999, involving Presidential visits to several "New Markets" showcasing successful examples of private investment in distressed rural and inner-city areas. The President expects the May 5 roundtable and his announcement of the July domestic investment trip to generate excitement and support for the New Markets Initiative. As part of the July trip, the President will highlight investment commitments from major corporations that demonstrate corporate leadership in New Markets investment.

Following the roundtable and the Rose Garden announcement, the President will travel to Miami, Florida to meet with businesses and financial institutions in the Empowerment Zone. Empowerment Zones are examples of untapped markets that will benefit from private investment as a result of government programs and tax incentives. The visit in Miami will highlight successful examples of private investment helping to revitalize communities. We invite you to accompany the President and join us as we meet with local businesses.

We look forward to meeting with you next week. Additional follow-up information will be sent to your office later this week with logistics for the morning roundtable and the afternoon trip.

Respectfully,

Withdrawal/Redaction Marker
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Lisa Green
OA/Box Number: 20588

FOLDER TITLE:

CEO Roundtable

2012-0043-S
ms431

RESTRICTION CODES

Presidential Records Act - [44 U.S.C. 2204(a)]

P1 National Security Classified Information [(a)(1) of the PRA]
P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
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P6 Release would constitute a clearly unwarranted invasion of personal privacy [(a)(6) of the PRA]

C. Closed in accordance with restrictions contained in donor's deed of gift.
PRM. Personal record misfile defined in accordance with 44 U.S.C. 2201(3).
RR. Document will be reviewed upon request.

Freedom of Information Act - [5 U.S.C. 552(b)]

b(1) National security classified information [(b)(1) of the FOIA]
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b(8) Release would disclose information concerning the regulation of financial institutions [(b)(8) of the FOIA]
b(9) Release would disclose geological or geophysical information concerning wells [(b)(9) of the FOIA]

Record Type: Record

To: Gene B. Sperling/OPD/EOP@EOP

cc:
Subject: NMI

Gene:
Can you fill me in?
Morley

---------------------- Forwarded by Morley A. Winograd/OVP on 04/26/99 05:26 PM ---------------------------

Monica M. Dixon
04/23/99 12:44:07 PM

Record Type: Record

To: Morley A. Winograd/OVP@OVP, Beth A. Viola/CEQ/EOP@EOP, Ansley Jones/OVP@OVP

cc:
Subject: NMI

POTUS is asking Big 3 to come in to meet with him the May 5 on new market initiative? Is everyone coordinating everything here?

Lisa Green
04/26/99 06:46:39 PM

Record Type: Record

To: Sarah Rosen/OPD/EOP@EOP

cc: Jonathan A. Kaplan/OPD/EOP@EOP, Melissa G. Green/OPD/EOP@EOP
Subject: Re: NMI from Morley & Dixon

Just spoke with Alvin Brown --- he agreed to contact Ansley, Dixon and Morley's folks to let them know he and Jonathan Weis have been involved in all of the planning for this trip. I also personally spoke with Viola from CEQ and she agreed that the two events did not seem to present a big conflict. So, we are communicating down here at our level, but I'm not sure the information was being sent all the way up the flag pole at OVP. Alvin will make sure everyone at OVP knows that we are all working on the same page.

JONATHAN A. KAPLAN
05/03/99 12:21:18 PM

Record Type: Record

To: Melissa G. Green/OPD/EOP@EOP
cc: sarah rosen wartell/opd/eop@eop, lisa green/opd/eop@eop
bcc:
Subject: Re: CEO

FYI, I just spoke with Cheri Carter. We are all on the same page.

She has not invited anyone but CEOs. The two non-CEOs on the list below appear there only because the CEO asked Cheri if they could attend for them; Cheri has NOT given a thumbs-up or thumbs-down to them yet on that question -- even on just attending.

She is very clear that we are only inviting CEOs to participate.

Kaplan
Melissa G. Green

Melissa G. Green
05/03/99 10:47:21 AM

Record Type: Record

To: Jonathan A. Kaplan/OPD/EOP@EOP
cc: Sarah Rosen Wartell/OPD/EOP@EOP, Lisa Green/OPD/EOP@EOP
Subject: CEO

As of this morning, below is a list of CEO's that Cheri has heard back from. Gene wants Kaplan to call her and discuss how we will handle the non-CEOs (fyi: he does not think they get seated at the table with the President). Just wanted everyone in the loop. Thanks

yes-- NY Life: Sy Steinberg, CEO

yes -- AT & T Wireless: Dan Hess, President

yes -- Nation's Bank (expected today): Hugh McColl, CEO

yes -- AETNA: Dick Huber, CEO

yes -- BET: Debra Hill, President and COO

yes -- Sandy Weill, Travelers, CEO

no -- United

no-- Proctor & Gamble

no -- SIGNA

JONATHAN A. KAPLAN
05/03/99 10:49:18 AM

Record Type: Record

To: Cheryl M. Carter/WHO/EOP@EOP, Sarah Rosen Wartell/OPD/EOP@EOP, Lisa Green/OPD/EOP@EOP

cc: Melissa G. Green/OPD/EOP@EOP
Subject: CEO roundtable next week

We just had a short conversation with Gene, who feels strongly that the CEO roundtable with the President next Tuesday be a **CEOs-only** roundtable. If other senior execs are coming in place of the CEOs, that's nice, but it doesn't make a whole lot of sense to seat them at a CEO roundtable.

Gene believes that if this is going to be a big deal, then we have to push to get real commitments from these folks, and this requires the CEOs to be at the table when the President really engages with them. He also is concerned that it reduces the weight of the CEOs present to seat them with non-CEOs.

We need to do a status check later today on where we are on the CEO front and what we need to do. Gene plans to make CEO calls for about 90 minutes early this afternoon.

Kaplan

a conversation about corporate efforts is America's in underserved communities as well as

DRAFT!!! DRAFT!!! DRAFT!!! DRAFT!!! – as of 4/30/1999, 8:00 PM

April 30, 1999

you to participate

Dear CEO,

On the morning of Tuesday, May 11, 1999 the White House will host a roundtable with CEOs from across the United States to discuss corporate America's role in revitalizing underserved communities. I am pleased to invite ~~your participation~~ in this event. The meeting will include a discussion of the Administration's recent work on a set of initiatives, known collectively as the New Markets Initiative, designed to spur new investment in urban and rural areas through tax credit and loan guarantee incentives.

We hope that, through this meeting, we will exchange information w/one another
~~The morning's agenda will include an exchange of information~~ about successful investment programs and profitable businesses emerging throughout the country in economically distressed communities. Following the roundtable, we invite you to join the President as he makes an announcement in the Rose Garden about plans to visit new markets in July. You are also invited to accompany the President on Air Force One for a brief visit to Atlanta, Georgia [or Akron, Ohio] where we will meet with local businesses that illustrate the investment potential in untapped and underserved markets.

[Should we be saying this?]
As you know,
America is experiencing the longest peacetime economic expansion in its history, marked by tremendous business and job growth. Despite this economic boom, many urban and rural areas of the country have not participated in the capital investment that has spurred job growth and economic development elsewhere at home and abroad. President Clinton's commitment to building one America is a commitment to making progress for all Americans in every home and community in the nation. We are seeking your commitment to help build a network of private investment institutions that can funnel credit, equity and technical assistance to businesses in America's new markets. -- such as yours --

on the date above

~~After the morning roundtable, participants will be asked to join us in the Rose Garden where the President will announce an unprecedented domestic trip scheduled for July 1999.~~ ~~During this~~ The ~~July trip, the President will visit new markets throughout the country~~, showcasing successful examples of private investment in ~~distressed rural and inner-city~~ areas. As part of the July trip, the President expects to highlight new investment commitments from major corporations to demonstrate corporate America's leadership role in new markets. We need your assistance in identifying success stories and developing new innovative investment strategies. ~~We hope~~ It is our hope that by July you will be prepared to announce your company's initiatives and new investment commitments designed to leverage the untapped potential in underserved communities. ~~that have been unable to access capital in the past.~~

Following the roundtable and the Rose Garden announcement, the President will travel to Atlanta, GA to meet with businesses and financial institutions in the Empowerment Zone. Empowerment Zones are examples of untapped markets that are currently benefiting from private investment resulting from government programs and tax incentives. The visit in Atlanta will highlight successful examples of private investment helping to revitalize communities. We invite you to accompany the President and join us as we meet with local businesses.

Is this necessary?

We look forward to meeting with you next week. Additional follow-up information will be sent to your office later this week with a full agenda, background materials and logistics for the morning roundtable and the afternoon trip.

Respectfully,

Gene Sperling

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Lisa Green
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[002]

Cheryl M. Carter 04/29/99 11:50:18 AM

Record Type: Record

To: Jonathan A. Kaplan/OPD/EOP@EOP

cc: Jackson T. Dunn/WHO/EOP@EOP, Melissa G. Green/OPD/EOP@EOP, Sarah Rosen/OPD/EOP@EOP, Lisa Green/OPD/EOP@EOP

Subject: Re: CEOs and New Markets

He can make CEO calls now...and it would help for him to do it today and tomorrow. The sooner he makes the calls the more help he can be in trying to get the CEO's to change their schedule. The only absolute no's we have are Procter & Gamble and Cigna CEO's...they have events they cannot change...they were not on the original list of calls Gene wanted to make anyway.

P5

DRAFT!!! DRAFT!!! DRAFT!!! DRAFT!!! – as of 4/26/1999, 4:30 PM

Dear CEO,

On the morning of May 5, 1999 the White House will host a roundtable with CEOs from across the United States to discuss corporate America's role in revitalizing underservered communities. I am pleased to invite your participation in this event. The meeting will include a discussion of the Administration's recent work on a set of initiatives, known collectively as the New Markets Initiative, designed to spur new investment in urban and rural areas. We would like you to join us following the roundtable as the President makes an announcement in the Rose Garden about his plans to visit New Markets in July. You are also invited to accompany the President on Air Force one for a brief visit to Miami, Florida where we will meet with local businesses to highlight investment potential in untapped and underserved markets. [Columbia, South Carolina is still a possibility --- still no final decision on Miami versus Columbia, but we are down to one city based on scheduling's position that two cities are not feasible.]

We are currently experiencing the longest peacetime economic expansion in history, marked by tremendous business and job growth. Despite this economic boom, many urban and rural areas of the country have not participated in the capital investment that has spurred job growth and economic development elsewhere at home and abroad. President Clinton's commitment to building one America is a commitment to making progress for all Americans, in every home and community in the nation. The President's FY 2000 balance budget contains tax incentives and new investment programs modeled after existing successful programs like the SBIC (Small Business Investment Companies) program administered by the Small Business Administration and OPIC (the Overseas Private Investment Corporation).

[Gene: Jon suggests that we leave this paragraph out, as it will leak]. After meeting with the President, participants in the roundtable will be asked to join us in the Rose Garden to announce an unprecedented domestic trip scheduled for July 1999, involving Presidential visits to several "New Markets" showcasing successful examples of private investment in distressed rural and inner-city areas. The President expects the May 5 roundtable and his announcement of the July domestic investment trip to generate excitement and support for the New Markets Initiative. As part of the July trip, the President will highlight investment commitments from major corporations that demonstrate corporate leadership in New Markets investment.

Following the roundtable and the Rose Garden announcement, the President will travel to Miami, Florida to meet with businesses and financial institutions in the Empowerment Zone. Empowerment Zones are examples of untapped markets that will benefit from private investment as a result of government programs and tax incentives. The visit in Miami will highlight successful examples of private investment helping to revitalize communities. We invite you to accompany the President and join us as we meet with local businesses.

We look forward to meeting with you next week. Additional follow-up information will be sent to your office later this week with logistics for the morning roundtable and the afternoon trip.

Respectfully,

Gene Sperling

DRAFT!!! DRAFT!!! DRAFT!!! DRAFT!!!

April 27, 1999

Dear CEO,

On May 5, 1999, the White House will host a roundtable discussion with approximately 15-25 CEOs from across the country to discuss corporate America's role in revitalizing underserved communities. I am pleased to invite you to participate in this event. The meeting will include a discussion of the Administration's recent work on a set of programs, known collectively as the New Markets Initiative, designed to spur new investment in urban and rural areas.

We are currently experiencing the longest peacetime economic expansion in history, marked by tremendous business and job growth. Despite this, many urban and rural areas of the country have not participated in the capital investment that has spurred job growth and economic development elsewhere at home and abroad. President Clinton's commitment to building one America is a commitment to making progress for all Americans, in every community in the nation. The President's FY 2000 balanced budget contains tax incentives and new investment programs modeled after existing successful programs like the SBIC (Small Business Investment Companies) program administered by the Small Business Administration and OPIC (the Overseas Private Investment Corporation).

[Not sure we want to say the following, as it will leak:] After meeting with the President, participants in the roundtable will be asked to join us in announcing an unprecedented domestic trip scheduled for July 1999, involving Presidential visits to several "New Markets" showcasing successful examples of private investment in distressed rural and inner-city areas. The President expects the May 5 roundtable and his announcement of the July domestic investment trip to generate excitement and support for the New Markets Initiative. As part of the July trip, the President will highlight investment commitments from major corporations that demonstrate corporate leadership in New Markets investment.

Following the roundtable, the President will travel to Columbia, South Carolina to meet with businesses and financial institutions in the Empowerment Zone. Empowerment Zones are examples of untapped markets that will benefit from private investment as a result of government programs and tax incentives. The visit in Columbia will highlight successful examples of private investments helping to revitalize communities. We invite you to accompany the President and join us as we meet with local businesses.

We look forward to meeting with you next week. Additional follow-up information will be sent to your office later this week with logistics for the morning roundtable and the afternoon trip.

Respectfully,

Gene Sperling

Agenda

[illegible] RT - [illegible]

Rose Garden - all members
[illegible]

[illegible]

Context

[illegible] [illegible]

[illegible] [illegible] [illegible] to [illegible]

process [illegible] Co. The Rose Garden

[illegible] [illegible] [illegible] Options

proposal [illegible]

DRAFT!!! DRAFT!!! DRAFT!!! DRAFT!!! – as of 4/30/1999, 8:00 PM

April 30, 1999

Dear CEO,

On the morning of Tuesday, May 11, 1999 the White House will host a roundtable with CEOs from across the United States to discuss corporate America's role in revitalizing underservered communities. I am pleased to invite your participation in this event. The meeting will include a discussion of the Administration's recent work on a set of initiatives, known collectively as the New Markets Initiative, designed to spur new investment in urban and rural areas through tax credit and loan guarantee incentives.

The morning's agenda will include an exchange of information about successful investment programs and profitable businesses emerging throughout the country in economically distressed communities. Following the roundtable we invite you to join the President as he makes an announcement in the Rose Garden about plans to visit new markets in July. You are also invited to accompany the President on Air Force One for a brief visit to Atlanta, Georgia [or Akron, Ohio] where we will meet with local businesses that illustrate the investment potential in untapped and underserved markets.

America is experiencing the longest peacetime economic expansion in its history, marked by tremendous business and job growth. Despite this economic boom, many urban and rural areas of the country have not participated in the capital investment that has spurred job growth and economic development elsewhere at home and abroad. President Clinton's commitment to building one America is a commitment to making progress for all Americans in every home and community in the nation. We are seeking your commitment to help build a network of private investment institutions that can funnel credit, equity and technical assistance to businesses in America's new markets.

After the morning roundtable, participants will be asked to join us in the Rose Garden where the President will announce an unprecedented domestic trip scheduled for July 1999. During this July trip the President will visit new markets throughout the country, showcasing successful examples of private investment in distressed rural and inner-city areas. As part of the July trip, the President expects to highlight new investment commitments from major corporations to demonstrate corporate America's leadership role in new markets. We need your assistance in identifying success stories and developing new innovative investment strategies. We hope that by July you will be prepared to announce your company's initiatives and new investment commitments designed to leverage the untapped potential in communities that have been unable to access capital in the past.

Following the roundtable and the Rose Garden announcement, the President will travel to Atlanta, GA to meet with businesses and financial institutions in the Empowerment Zone. Empowerment Zones are examples of untapped markets that are currently benefiting from private investment resulting from government programs and tax incentives. The visit in Atlanta will highlight successful examples of private investment helping to revitalize communities. We invite you to accompany the President and join us as we meet with local businesses.

We look forward to meeting with you next week. Additional follow-up information will be sent to your office later this week with a full agenda, background materials and logistics for the morning roundtable and the afternoon trip.

Respectfully,

Gene Sperling

Cheryl M. Carter 04/26/99 02:07:22 PM

Record Type: Record

To: See the distribution list at the bottom of this message

cc:
Subject: DOL Holds on a few companies

FYI...the DOL vet came back with some concerns regarding the companies below. The only one we didn't expect was Boeing. Over the weekend DOL was ok with Boeing but this morning we were put on hold with them. Janenda's office is vetting the entire list.

---------------------- Forwarded by Cheryl M. Carter/WHO/EOP on 04/26/99 02:01 PM ---------------------------

swirsky-stephanie @ dol.gov
04/26/99 12:41:00 PM

Record Type: Record

To: Cheryl M. Carter

cc:
Subject: FW: New Markets

See below re overlap of your CEOs and our summer jobs. Note we are finding problems with:

Walmart
Food Lion
American Airlines
Bankers Trust
Boeing

I will give you a final read on it by the end of the day....

From: Swirsky Stephanie
Sent: Monday, April 26, 1999 1:39 PM
To: Kamela William; Montgomery Edward; Peluso Michelle; Harris Seth; Swirsky Stephanie
Cc: Satterfield Lee; Valdez Suzanna; Hayes Pamela
Subject: RE: New Markets

There actually is some overlap between the current invite list and our summer jobs employers (the list I have from ETA is from 1996). Those overlapping employers are:

Aetna
Bank Boston

Bell Atlantic
NationsBank
AT&T
Ford Motor Company
General Motors
Chrysler

All of the companies are currently being vetted in the Department and I will highlight the overlapping companies once they are through the Department.

From: Swirsky Stephanie
Sent: Friday, April 23, 1999 11:18 AM
To: Kamela William; Montgomery Edward; Peluso Michelle; Harris Seth
Cc: Satterfield Lee; Valdez Suzanna; Hayes Pamela
Subject: RE: New Markets

Seth,

I left a message to get the CEO list and can then compare with our summer jobs CEO list, however, I don't hold out much hope that I will get it from them today, as those who are in at OPL at the White House are up to their ears in NATO. Will provide the info to Bill and Michelle as soon as available.

Bill, my summer jobs/CEO list is a year old, who in ETA would have more recent info?

thanks.

From: Harris Seth
Sent: Friday, April 23, 1999 10:58 AM
To: Kamela William; Montgomery Edward; Peluso Michelle
Cc: Satterfield Lee; Valdez Suzanna; Hayes Pamela; Swirsky Stephanie
Subject: New Markets

I will be preparing a more detailed memo for the Secretary on yesterday's staff-level New Markets meeting at the White House. But there is an assignment we need to get done ASAP.

In brief, the President will be holding an event on May 5 to announce a five-city, two-day tour in July to highlight his "capital investment in new markets/distressed areas." For July, the involved agencies will be recruiting companies and banks to make major commitments to invest in distressed areas. On May 5, the President will hold a breakfast roundtable with CEOs to discuss opportunities in distressed areas. He will then take the CEOs to one of five East Coast cities (NY, Boston, Miami, Durham, and Sumter are being discussed) for an event. The President has agreed to all of this.

Sarah Rosen wants to have a clear message about capital investment on these days. I spoke with her after the meeting and convinced her to consider a supply-side adjunct to the main message. The two possibilities I suggested were Youth Opportunities and Summer Jobs, which we have tentatively scheduled to announce at around the time of the President's first event. The message would be something like: "While we're focusing on the importance of getting capital and new businesses into these communities, we shouldn't forget that our goal is more and better jobs. And that means more and better skills for the people, particularly the young people, who live in these communities." Then, he could amplify the Youth Opps. SGA announcement of May 4 and the Summer Jobs kickoff of May 5.

I made clear to Sarah that there is no way we can squeeze Youth Opps. into a private investment message. Summer Jobs can fit because, although there is a significant federal investment, we also make a significant and successful effort to recruit private employers to invest in summer jobs.

Sarah asked that we prepare 2 or 3 paragraphs of speech text that the President could use as part of his New Markets message on May 5th consistent with the case I made above.

Bill, would you and Michelle please prepare something? For Youth Opps., just try to give a description of its importance. For summer jobs, focus on the private sector commitment and give as many specific employer references as possible. It would be best if some of the CEOs the President will be including in the May 5th breakfast are also summer jobs partners. Ask Stephanie to check with Cheri Carter at the White House who has the list and is making the calls beginning today or Monday.

I need to send something to Sarah by COB Monday. Thanks.

042613C6.TXT

Message Sent To:

Lisa Green/OPD/EOP@EOP
Melissa G. Green/OPD/EOP@EOP
Jonathan A. Kaplan/OPD/EOP@EOP
Sarah Rosen/OPD/EOP@EOP
Maria Echaveste/WHO/EOP@EOP
Marjorie Tarmey/WHO/EOP@EOP
Alvin Brown/OVP@OVP
Jonathan Weiss/OVP@OVP
Karen Tramontano/WHO/EOP@EOP
Jackson T. Dunn/WHO/EOP@EOP

Cheryl M. Carter 04/26/99 02:07:22 PM

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--------------------- Forwarded by Cheryl M. Carter/WHO/EOP on 04/26/99 02:01 PM ---------------------------

swirsky-stephanie @ dol.gov
04/26/99 12:41:00 PM

Record Type: Record

To: Cheryl M. Carter

cc:
Subject: FW: New Markets

See below re overlap of your CEOs and our summer jobs. Note we are finding problems with:

Walmart
Food Lion
American Airlines
Bankers Trust
Boeing

I will give you a final read on it by the end of the day....

From: Swirsky Stephanie
Sent: Monday, April 26, 1999 1:39 PM
To: Kamela William; Montgomery Edward; Peluso Michelle; Harris Seth; Swirsky Stephanie
Cc: Satterfield Lee; Valdez Suzanna; Hayes Pamela
Subject: RE: New Markets

There actually is some overlap between the current invite list and our summer jobs employers (the list I have from ETA is from 1996). Those overlapping employers are:

Aetna
Bank Boston

Bell Atlantic
NationsBank
AT&T
Ford Motor Company
General Motors
Chrysler

All of the companies are currently being vetted in the Department and I will highlight the overlapping companies once they are through the Department.

From: Swirsky Stephanie
Sent: Friday, April 23, 1999 11:18 AM
To: Kamela William; Montgomery Edward; Peluso Michelle; Harris Seth
Cc: Satterfield Lee; Valdez Suzanna; Hayes Pamela
Subject: RE: New Markets

Seth,

I left a message to get the CEO list and can then compare with our summer jobs CEO list, however, I don't hold out much hope that I will get it from them today, as those who are in at OPL at the White House are up to their ears in NATO. Will provide the info to Bill and Michelle as soon as available.

Bill, my summer jobs/CEO list is a year old, who in ETA would have more recent info?

thanks.

From: Harris Seth
Sent: Friday, April 23, 1999 10:58 AM
To: Kamela William; Montgomery Edward; Peluso Michelle
Cc: Satterfield Lee; Valdez Suzanna; Hayes Pamela; Swirsky Stephanie
Subject: New Markets

I will be preparing a more detailed memo for the Secretary on yesterday's staff-level New Markets meeting at the White House. But there is an assignment we need to get done ASAP.

In brief, the President will be holding an event on May 5 to announce a five-city, two-day tour in July to highlight his "capital investment in new markets/distressed areas." For July, the involved agencies will be recruiting companies and banks to make major commitments to invest in distressed areas. On May 5, the President will hold a breakfast roundtable with CEOs to discuss opportunities in distressed areas. He will then take the CEOs to one of five East Coast cities (NY, Boston, Miami, Durham, and Sumter are being discussed) for an event. The President has agreed to all of this.

Sarah Rosen wants to have a clear message about capital investment on these days. I spoke with her after the meeting and convinced her to consider a supply-side adjunct to the main message. The two possibilities I suggested were Youth Opportunities and Summer Jobs, which we have tentatively scheduled to announce at around the time of the President's first event. The message would be something like: "While we're focusing on the importance of getting capital and new businesses into these communities, we shouldn't forget that our goal is more and better jobs. And that means more and better skills for the people, particularly the young people, who live in these communities." Then, he could amplify the Youth Opps. SGA announcement of May 4 and the Summer Jobs kickoff of May 5.

I made clear to Sarah that there is no way we can squeeze Youth Opps. into a private investment message. Summer Jobs can fit because, although there is a significant federal investment, we also make a significant and successful effort to recruit private employers to invest in summer jobs.

Sarah asked that we prepare 2 or 3 paragraphs of speech text that the President could use as part of his New Markets message on May 5th consistent with the case I made above.

Bill, would you and Michelle please prepare something? For Youth Opps., just try to give a description of its importance. For summer jobs, focus on the private sector commitment and give as many specific employer references as possible. It would be best if some of the CEOs the President will be including in the May 5th breakfast are also summer jobs partners. Ask Stephanie to check with Cheri Carter at the White House who has the list and is making the calls beginning today or Monday.

I need to send something to Sarah by COB Monday. Thanks.

042613C6.TXT

Message Sent To:

Lisa Green/OPD/EOP@EOP
Melissa G. Green/OPD/EOP@EOP
Jonathan A. Kaplan/OPD/EOP@EOP
Sarah Rosen/OPD/EOP@EOP
Maria Echaveste/WHO/EOP@EOP
Marjorie Tarmey/WHO/EOP@EOP
Alvin Brown/OVP@OVP
Jonathan Weiss/OVP@OVP
Karen Tramontano/WHO/EOP@EOP
Jackson T. Dunn/WHO/EOP@EOP

Beth A. Viola 04/26/99 02:27:39 PM

Record Type: Record

To: Lisa Green/OPD/EOP@EOP

cc:
Subject: ceo list

lisa, here is the list of ceo's for the vp's mtg on tuesday 5/4. not all of these folks are confirmed or been invited to meet with the vp. most of these guys (except tva, post office, & getf) will be on the roundtable at the National Town Meeting before the VP speaks. Please let me know what else you need.

The Honorable William M. Daley
Secretary, U.S. Department of Commerce
14th St. and Constitution Ave. N.W.
Washington, D.C. 20230
Ph: 202-482-5880
Fax: 202-482-0052

William Stavropoulos, President & Chief Executive Officer, The Dow Chemical Company
The Dow Chemical Company
2030 Dow Center
Midland, MI. 48674
Ph:517-636-8172

Peter J. Pestillo, Vice Chairman & Chief of Staff, Ford Motor Company
The American Road
P.O. Box 1899
Dearborn, MI 48121-1899

John F. Smith, Jr., Chairman, President & CEO
General Motors Corporation
100 Renaissance Center
P.O. Box 43101
Detroit, MI 48243-7301

Anthony F. "Tony" Earley, Jr.
Chairman and CEO, DTE Energy Company
2002 2nd Avenue
Detroit, MI 48226-1279

Gary Hirshberg
President and CEO, Stonyfield Farm
10 Burton Drive
Londonberry, NH 03053
603-437-4040

Barbara Krumsiek, Vice Chairman, Calvert Group Ltd.

President & Chief Executive Officer
The Calvert Group
4550 Montgomery Avenue
12th Floor
Bethesda, MD 20814

Robert Wayne Loescher, President & CEO, Sealaska Corporation
10645 Misty Lane
Juneau, Alaska 99801
907-586-9231 (business)

OTHERS TO BE INCLUDED - 8 total

Mr. Robert J. Eaton
Chairman & CEO
DaimlerChrysler Corporation
1000 Chrysler Drive
Auburn Hills, MI 48326-2766
248-512-6728
(He has Board meeting in New York - low chance of being there.
(Mr.Frank Fountain, Senior Vice President of Public Affairs will be their rep. on-site.)

Mr. Floyd Hall
Chairman, President & CEO
Kmart Corporation
3100 West Big Beaver Road
Troy, MI 48084-3163
248-643-1000, 643-5249

Mr. Ray Anderson
Chairman, CEO & President
Interface, Inc.
2859 Paces Ferry Road
Atlanta, GA 30339
770-437-6801, 437-6822

Mr. Samuel C. Johnson
Chairman
S.C. Johnson & Son, Inc
1524 Howe Street
Racine, WI 53403-2236
414-260-2000, 260-2133

Mr. Craven H. Crowell, Jr.
Chairman
Tennessee Valley Authority (TVA)
400 West Summit Hill Drive
Knoxville, TN 37902
423-632-2531, 632-6634

Mr. William J. Henderson
Postmaster General and Chief Executive Officer
United States Postal Service

475 L'Enfant Plaza SW
Washington, D.C. 20260-3100

Mr. Thomas Harvey
Founder and Chairman
Global Environment & Technology Foundation
President
A-55 L.P.
5270 Neil Road
Reno, NV 89502
775-826-8300
(Note: Would present the Vice President with signed, numbered and framed print of the Detroit painting he commissioned.)

Mr. F. Henry Habicht II
Chief Executive Officer
Global Environment & Technology Foundation
7010 Little River Turnpike
Annandale, VA 22003
703-750-6401

MEMORANDUM

DATE: April 20, 1999

TO: Cheri Carter

FROM: Lisa Green

RE: Potential Invitees for Presidential Roundtable on New Markets

In addition to using the list that you were given of corporations that have invested in community development venture capital funds, we may want to consider inviting representatives from some of the following organizations:

CORPORATIONS (These companies are in addition to those identified by Julia Rubin on the list you already have. Her list only included corporations that have already invested in community development venture capital funds. This list includes companies that have invested in and or syndicated low income housing tax credit equity investments as well as companies with active community development initiatives).

Ameritech
Bank of America (the merger with NationsBank is still underway; we may want to invite representatives from both organizations)
Bank One
BellSouth
Boston Financial Company
Fannie Mae/American Communities Fund
GE Capital (a subsidiary of General Electric Company)
KeyBank
National Cooperative Bank (parent company of NCB Development Corporation)
Norwest
Wachovia
The Related Companies
SunAmerica (recently acquired by AIG, a major insurance company)
SouthShore Bank
Wells Fargo Bank

NON-PROFIT ORGANIZATIONS (* indicates that the group was also a CDFI grant recipient)

Center for Community Change
Center for Community Self Help
Community Development Venture Capital Alliance
Community Reinvestment Fund
Enterprise Foundation *
Ford Foundation
LISC - Local Initiatives Support Corporation *
McAuley Institute *
National Community Reinvestment Coalition
National Association of Affordable Housing Lenders
Initiative for Competitive Inner City
National Congress for Community Economic Development
Rural Community Assistance Corp.
Rural Development Finance Corp

COMMUNITY DEVELOPMENT FINANCIAL INSITUTITIONS (All of the following received funding from the CDFI Program under Treasury last year)

Kentucky Highlands Investment Corporation
Self Help Credit Union - Durham, North Carolina
Low Income Housing Fund
Enterprise Corporation of the Delta
Coastal Enterprises Inc.
New York Community Investment Company
Community Preservation Corporation

FORTUNE FIVE HUNDRED COMPANIES (The following are some companies in the top 100 of the Fortune 500 that are not included on Julia Rubin's list and not included in my list above. They may or may not have current community development initiatives. ** indicates insurance companies, financial institutions, telecommunications corporations, and utilities --- companies that probably already make venture capital investments, directly or through subsidiaries; + indicates retail companies that might be interested in opening locations in new markets).

Aetna **
AIG **
All State Insurance **
American Airlines
American Express **
Bankers Trust **
Boeing
Burger King
Caterpillar
Chevron
Cigna **
Compaq
ConAgra
Costco +
CVS +
Daimler Chrysler
Dayton-Hudson
Enron
Exxon
Ford
Freddie Mac **
General Motors
GTE **
Hewlett-Packard
Home Depot +
IBM
Intel
International Paper
J.C. Penney +
Johnson and Johnson
K-Mart +
Kroger +
Lucent Technologies **
Merck

FORTUNE FIVE HUNDRED COMPANIES (cont.)

MCI World Com **
Mobil
Motorola
PepsiCo
Phillip Morris
Procter & Gamble
Prudential Insurance **
Safeway
Sara Lee
State Farm Insurance **
Sears-Roebuck +
Texaco
United Airlines
United Technologies
USX
Wal-Mart +
Walt Disney
Walgreen
Xerox

COMMUNITY DEVELOPMENT VENTURE CAPITAL FUND INVESTORS (list compiled by Julia Rubin)

ABC, Inc.
American State Bank
Androscoggin Savings Bank
AT&T Corp.
Bank of New York Co., Inc.
Bank of Yazoo City
BankBoston
Bankers Trust Company
Bath Savings Institution
Bear Stearns
Bell Atlantic
Blackstone Group
Boston Edison
Boston Safe Deposit & Trust
Calvert Social Investment Fund
CBS Corporation
Central Bank – Monroe
Chase Manhattan Corporation
CIBC Oppenheimer
Citibank
Concordia Bank & Trust Company
Consolidated Edison Company of New York
Corestates Bank
Credit Suisse/First Boston
Deloitte & Touche LLP
Deposit Guaranty National Bank
Dime Bancorp
Donaldson, Lufkin & Jenrette
Estee Lauder Companies Inc.
Farmers Bank & Trust Company

Fidelity Investments
First National Bank of Commerce
First National Bank of Phillips County
First Union
Fleet Bank
General Electric Company
Goldman, Sachs & Co.
Hibernia National Bank
Independence Savings Bank
J.P. Morgan & Co.
Kennebunk Savings Bank
Key Bank of Maine
Loews Corporation
Magellan Health Services, Inc.
Merchants & Farmers Bank
Merrrill Lynch L. P. Holdings Inc.
Metropolitan Life Insurance Company
Morgan Stanley & Dean Witter & Co.
Nations Bank
NCB Development Corporation
New York Life Insurance Company
Ocean National Bank
PaineWebber Group Inc.
Peoples Heritage Bank
Pepperell Trust Company
Pfizer Inc .
Planters Bank & Trust Company
PNC Bank
Primedia Inc.
Readers Digest Association
Simmons First National Bank
State Street Bank
Tiffany & Company
Time Warner Inc.
Travelers Group
Trustmark National Bank
Union Planters Bank of NW Mississippi
USTrust and the United States Trust

OTHER IDEAS

Universities (University of Pennsylvania, Howard University, Yale, etc.)
Faith Based Organizations (New Bethel Life, Abyssinia Development Corporation, etc.)

DRAFT INVITATION LIST FOR NEW MARKETS CEO MEETING:
(As of 4/20/99; 6:00 pm)

Citigroup/Travelers
Sanford I. Weill
Chairman & CEO

AT&T
C. Michael Armstrong
Chairman &CEO

GE
John F. Welch, Jr.
Chairman & CEO

NationsBank/BankAmerica

Goldman Sachs

The Boeing Company
Philip M. Condit
Chairman & CEO

Ameritech
Richard C. Notebaert
Chairman & CEO

General Motors
John F. Smith, Jr.
Chairman, CEO & President

Ford
William C. Ford, Jr.
Chairman

Daimler Chrysler
Robert Eaton
Co-CEO

Bank Boston

Bankers Trust
Frank N. Newman
Chairman & CEO

Bell Atlantic
Ivan G. Seidenberg
CEO

Fidelity

Loews Corporation

Merrill Lynch
David H. Komansky
Chairman, President & CEO

Estee Lauder Companies

Metropolitan Life Insurance Company
Robert H. Benmosche
Chairman, President & CEO

New York Life
Sy Sternberg
Chairman, President & CEO

Pfizer
William C. Steere, Jr.
Chairman & CEO

State Street Bank

Safeway

Procter & Gamble

Kroger

IBM
Louis Gerstner
CEO

United Airlines
Gerald Greenwald
CEO

American Airlines
Donald J. Carty
Chairman, President & CEO

Burger King
Dennis Malimatinas
CEO

Southern California Edison

GTE
Charles R. Lee
Chairman & CEO

Fannie Mae
Frank Raines
CEO

Freddie Mac

Ernst & Young
Bank of New York

MEMORANDUM

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TO: Cheri Carter

FROM: Lisa Green

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Fannie Mae/American Communities Fund
KeyBank
Wells Fargo Bank
Bank of America (the merger with NationsBank is still underway; we may want to invite representatives from both organizations)
Bank One
Norwest
Wachovia
Ameritech
BellSouth
The Related Companies
Boston Financial Company
SunAmerica (recently acquired by AIG, a major insurance company)
GE Capital (a subsidiary of General Electric Company)
SouthShore Bank
National Cooperative Bank (parent company of NCB Development Corporation)

NON-PROFIT ORGANIZATIONS (* indicates that the group was also a CDFI grant recipient)

Enterprise Foundation *
LISC - Local Initiatives Support Corporation *
Ford Foundation
Initiative for Competitive Inner City
McAuley Institute *
Community Reinvestment Fund
Center for Community Self Help
Rural Community Assistance Corp.
Rural Development Finance Corp
National Congress for Community Economic Development
Community Development Venture Capital Alliance

National Community Reinvestment Coalition

Republic National Bank of NY
Center for Community Change

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Self Help Credit Union - Durham, North Carolina
Low Income Housing Fund
Enterprise Corporation of the Delta
Coastal Enterprises Inc.
New York Community Investment Company
Community Preservation Corporation

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General Motors
Ford
Wal-Mart +
Exxon
IBM
Phillip Morris
State Farm Insurance **
Mobil
Hewlett-Packard
Sears-Roebuck +
Procter & Gamble
Prudential Insurance **
K-Mart +
AIG **
Texaco
Enron
Compaq
Dayton-Hudson
J.C. Penney +
Home Depot +
Lucent Technologies **
Motorola
Kroger +
Merck
Chevron
Intel
All State Insurance **
United Technologies
GTE **
USX
Safeway
Costco +
ConAgra
Caterpillar
Johnson and Johnson
Caterpillar
Xerox

FORTUNE FIVE HUNDRED COMPANIES (cont.)

Sara Lee
Aetna **
PepsiCo
Walt Disney
Cigna
International Paper
American Express **
Walgreen
MCI World Com **
CVS +
Freddie Mac **

OTHER IDEAS

Universities (University of Pennsylvania, Howard University, Yale, etc.)
Faith Based Organizations (New Bethel Life, Abyssinia Development Corporation, etc.)

Melissa G. Green
05/05/99 10:31:26 AM

Record Type: Record

To: Lisa Green/OPD/EOP@EOP, Jonathan A. Kaplan/OPD/EOP@EOP, Sarah Rosen Wartell/OPD/EOP@EOP

cc:
Subject: fyi:

Sarah: fyi for you.

---------------------- Forwarded by Melissa G. Green/OPD/EOP on 05/05/99 10:30 AM ---------------------------

Jackson T. Dunn
05/05/99 10:26:54 AM

Record Type: Record

To: Melissa G. Green/OPD/EOP@EOP

cc:
Subject:

Can we invite Jon Corzine, Chairman of Goldman Sachs, instead of Hank Paulson to Tuesday's meeting?