

Withdrawal/Redaction Sheet

Clinton Library

DOCUMENT NO. AND TYPE	SUBJECT/TITLE	DATE	RESTRICTION
001. paper	Chris Roubideaux; RE: personal info [partial] (1 page)	n.d.	P6/b(6)
002. memo	Draft Memorandum to the President; RE: personal info [partial] (1 page)	08/11/1999	P6/b(6)

COLLECTION:

Clinton Presidential Records
 Policy Development
 Lisa Green
 OA/Box Number: 20586

FOLDER TITLE:

[New Markets Agenda & Meetings] [loose]

2012-0043-S
ms236

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]
- P3 Release would violate a Federal statute [(a)(3) of the PRA]
- P4 Release would disclose trade secrets or confidential commercial or financial information [(a)(4) of the PRA]
- P5 Release would disclose confidential advice between the President and his advisors, or between such advisors [(a)(5) of the PRA]
- 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]
- b(2) Release would disclose internal personnel rules and practices of an agency [(b)(2) of the FOIA]
- b(3) Release would violate a Federal statute [(b)(3) of the FOIA]
- b(4) Release would disclose trade secrets or confidential or financial information [(b)(4) of the FOIA]
- b(6) Release would constitute a clearly unwarranted invasion of personal privacy [(b)(6) of the FOIA]
- b(7) Release would disclose information compiled for law enforcement purposes [(b)(7) of the FOIA]
- 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]

September 1999

Monthly Planner

**PHOTOCOPY
PRESERVATION**

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October 1999

Monthly Planner

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Scheduling row 1 a char*

*10A only
only in my's meetings*

*Delta budget
below report is done
Budget team ready - 35th*

September 1999

Monthly Planner

*15th Culture Report on
invested in skilled workers*

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HUD - Treasury

Early December inv

October 1999

Monthly Planner

*10/11/99
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Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	1	2
					EDA Event on Technology Needs in Native Communities DOT Listening Tour Baton Rouge	Commerce Announcement of Partnership with EDA- Date TBD
3	4	5	6	7	8	9
Commerce Announcement of TISAP grants- Date TBD DOT Listening Tour	DOT Listening Tour Cape Girardo, Missouri			Back-to-School Event on Job Training, Baltimore, Maryland (w/ Lt. Gov. Townsend) <i>DOL - Circulate</i>		
10	11	12	13	14	15	16
		DOL rollout of Youth Opportunities Program PSAs, Los Angeles, CA				
17	18	19	20	21	22	23
24	25	26	27	28	29	30
		Commerce Visit to Mississippi Delta (Tentative)				
31	1	2	3	4	5	6

October 1999							November 1999							December 1999						
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Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	1 Second New Markets Tour- Date TBD	2	3	4 Navy Yard Event, Washington, D.C. on "Bridges to Friendship" project	5	6
7	8	9	10	11	12	13
14	15 Treasury and SBA Delta Finance Summit- Date TBD Secretary Herman addresses Detroit Economic Club on Youth	16	17	18 Foundation Roundtable on Youth (tent.)	19	20
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<p>November 1999</p> <table border="1"> <tr><td>S</td><td>M</td><td>T</td><td>W</td><td>T</td><td>F</td><td>S</td></tr> <tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> <tr><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr><td>29</td><td>30</td><td></td><td></td><td></td><td></td><td></td></tr> </table>	S	M	T	W	T	F	S	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30						<p>December 1999</p> <table border="1"> <tr><td>S</td><td>M</td><td>T</td><td>W</td><td>T</td><td>F</td><td>S</td></tr> <tr><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td></tr> <tr><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td></tr> <tr><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td></tr> <tr><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td></tr> <tr><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td></td><td></td></tr> </table>	S	M	T	W	T	F	S			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			<p>January 2000</p> <table border="1"> <tr><td>S</td><td>M</td><td>T</td><td>W</td><td>T</td><td>F</td><td>S</td></tr> <tr><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> <tr><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr><td>29</td><td>30</td><td>31</td><td></td><td></td><td></td><td></td></tr> </table>	S	M	T	W	T	F	S	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
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Commerce Meeting with CEOs on digital Divide- Date TBD						
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THE WHITE HOUSE
WASHINGTON

**AGENDA FOR
NEW MARKETS MEETING**

*Room 180 OEOB; 4:30 – 5:30 PM
July 15, 1999*

- I. REPORT ON THE TRIP AND STATUS OF THE NEW MARKETS INITIATIVE**
- II. DISCUSSION OF ONGOING PROCESS AND COORDINATION**
- Unified and Inclusive Effort
 - Regular Interagency Staff Meetings
- III. FOLLOW THROUGH ON TRIP**
- Ideas and Suggestions on Future Events with the President
 - Possible Cabinet Events Amplifying New Markets Message
 - Discussion of Process for Tracking and Announcing New Markets Deliverables
 - Future Ongoing Efforts
- IV. LEGISLATIVE STRATEGY**
- The Republican Proposal – The American Community Renewal Act: H.R. 815
 - Introduction of Legislation
 - Proposed Legislative Event (TBD)

FU

AGENDA FOR NEW MARKETS MEETING
Room 231 OEOB; 3:00 – 4:00 pm
August 17, 1999

I. UPCOMING NEW MARKETS EVENTS/ACTIVITIES

- Cabinet Events – Master Calendar
- Arkansas Visit to the Delta (Fall)
- Newark, NJ/New Jersey Nets Event (Fall) – *v.p. info - Jason Williams, help*
- 2nd New Markets Tour (Fall)
- Sites Visited by President Clinton on the Tour – Coordination with Key Coordinators *Yag. Sledge*
↳ email on corporate, and govt grants

II. PROCESS FOR NEW MARKETS EVENTS/ACTIVITIES

- Lead White House Contact – National Economic Council
- Working with Scheduling/Advance
- *FOLLOWUP ON EVENTS*

III. NEW MARKETS DATA/RESEARCH GROUP – EXECUTIVE ORDER

IV. SUCCESS OF BUSINESSLINC EVENT

V. LEGISLATIVE UPDATE

Kathleen Aho re: always

VI. PROPOSED BRAINSTORMING SESSION FOR NEW IDEAS

Communications - check at Patrick

VII. OTHER ISSUES/QUESTIONS

trying to work partnerships

DPL - to set up key coordinators

*Dinner Commerce.
for JusticeHub HUBZone information*

** FCC announcements
check w/ Lynn*

→ SBA Policy under HUBZones

*Nicholas Cognin of American Ladies
in October*

Key Cognin for SBICS

August 1999

Monthly Planner

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday																																																																																				
1 SBA-DOD Announcements for HUBZones - Date TBD <i>will now be w/ williams team Hall</i>	2 Commerce Announcement about Digital Divide Meeting with 25 CEOs - Date TBD	3 Welfare to Work Partnership Conference in Chicago - POTUS, Alvarez, and Herman	4	5 Introduction of Tax Credit Bills and APICs Bills	6 Rainbow/PUSH Conference in Chicago - VPOTUS, Sperling, Alvarez, Herman and Mrs. Gore	7 Rainbow/PUSH Conference in Chicago - VPOTUS, Sperling, Alvarez, Herman and Mrs. Gore																																																																																				
8 NGA Conference - POTUS	9	10 BusinessLINC National Announcement - POTUS, Sperling, Summers, Alvarez	11	12 HUD Appalachian Summit in WV & KY - Cuomo, Herman, Slater, and Glickman	13 HUD Appalachian Summit in WV & KY - Cuomo, Herman, Slater, and Glickman	14																																																																																				
15	16 Labor Announcement of PEPNET Awards <i>September outside York program</i>	17	18	19	20 Alvarez Speech in Washington to African American Women on Tour	21																																																																																				
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29	30 HUD Announcement of Brownfields EDI Grants - Date TBD	31 HUD Storefront Openings - Throughout the Year	<table border="1"> <caption>July</caption> <tr><td>S</td><td>M</td><td>T</td><td>W</td><td>T</td><td>F</td><td>S</td></tr> <tr><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td><td></td></tr> <tr><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td></tr> <tr><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr> <tr><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td></tr> <tr><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td></tr> </table>		S	M	T	W	T	F	S				1	2	3		4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	<table border="1"> <caption>September</caption> <tr><td>S</td><td>M</td><td>T</td><td>W</td><td>T</td><td>F</td><td>S</td></tr> <tr><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td></tr> <tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr> <tr><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr> <tr><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr> <tr><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td></td><td></td></tr> </table>		S	M	T	W	T	F	S				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30		
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12	13	14	15 <i>Persepolis Hotel</i> Conference on Busi- ness LINC for Finan- cial Institutions - Multiple Agencies (inc: Treasury, CDFI)	16	17	18 <i>CHC</i> →																																										
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19	20	21 <i>Condoleezza travel</i>	22	23	24	25																																										
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26	27	28	29 Native American Lend- ing Study Workshops - Throughout the Fall	30 Commerce Meeting with CEOs on Digi- tal Divide, Date TBD - Daley		<table border="1"> <caption>October</caption> <tr><td>S</td><td>M</td><td>T</td><td>W</td><td>T</td><td>F</td><td>S</td></tr> <tr><td></td><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td></tr> <tr><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td></tr> <tr><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td></tr> <tr><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td></tr> <tr><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td></tr> </table>	S	M	T	W	T	F	S					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
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Appalachian
Summit

as scheduled

now more

decreased in poverty

will be a report a conference

**AGENDA FOR NEW MARKETS
MEETING**

Room 231 OEOP; 3:00 - 4:00 pm
August 17, 1999

I. UPCOMING NEW MARKETS EVENTS/ACTIVITIES

- Cabinet Events - Master Calendar
- Arkansas Visit to the Delta (Fall)
- Newark, NJ/New Jersey Nets Event (Fall) - v.p. import - Jason Williams, help
 Proctor, Yeh, Uchey, Crestone
- 2nd New Markets Tour (Fall)
- Sites Visited by President Clinton on the Tour - Coordination with Key Coordinators
 Yag, Strydom
 ↳ email on corporate, and grant grants

II. PROCESS FOR NEW MARKETS EVENTS/ACTIVITIES

- Lead White House Contact - National Economic Council
- Working with Scheduling/Advance
- *FOLLOWUP ON EVENTS*

III. NEW MARKETS DATA/RESEARCH GROUP - EXECUTIVE ORDER

IV. SUCCESS OF BUSINESSLINC EVENT

V. LEGISLATIVE UPDATE

Kathleen Akre re: attorney

VI. PROPOSED BRAINSTORMING SESSION FOR NEW IDEAS

Communities - check at Patrick

VII. OTHER ISSUES/QUESTIONS

try bonding

DBL - to set up key coordinators *helpful to work partnerships*

w/ Gene

Strategy on debarber

1 hour Gene - lunch in office

Pubinger - wants to meet on 8th

Strategic Coordination

Only staff for Gene

Workable Structure - Some of manner of continued by members
no staff - top of Gene list
assigned for legislative strategy
rules of the road - conducted through 1 person

→ tomorrow to Wednesday

after Wednesday

will meet at airport & make

to cover out to airport

Thursday - 1st day in Jackson Hb

Following week next

Kreiss, Michele L.

Remove yellow ones

*remove names
in yellow and
add ~~Elizabeth Kim~~
↓
Betsy Kim @sba.gov*

From: Lisa_Green@opd.eop.gov
Sent: Tuesday, August 31, 1999 10:17 AM
To: jorszag@doc.gov; shawkins@doc.gov; justin.paschal@usda.gov; irma.tucker@do.treas.gov; michael.barr@do.treas.gov; jonesm@cdfi.treas.gov; norma.jean.sponaugle@ost.dot.gov; ba.rudolph@ost.dot.gov; marianne.smith@ost.dot.gov; eugene.conti@ost.dot.gov; albert.eisenberg@ost.dot.gov; bart.chilton@usda.gov; clyde.williams@usda.gov; hayes-pamela@dol.gov; heyman-stephen@dol.gov; brandon-tiffany@dol.gov; saunders.miller@sba.gov; millicent.hodge@sba.gov; Michele.kreiss@sba.gov; kris.swedin@sba.gov; jacquie_m_lawing@hud.gov; scott_sherman@hud.gov; susan_m_wachter@hud.gov; doris_l_lesesne@hud.gov; cliff.kellogg@do.treas.gov; tara.muldoon@do.treas.gov; irma.tucker@do.treas.gov; harris-seth@dol.gov; david_s_kass@hud.gov; xavier_briggs@hud.gov; luechtw@cdfi.treas.gov; mcook1@doc.gov; CCox@mbda.gov; Don.christensen@sba.gov; Jane.Merkin@sba.gov; psingerm@doc.gov; AWells@mbda.gov; Andrew_J_Mayock@who.eop.gov; Gay_L_Joshlyn@opd.eop.gov; Paul_J_Weinstein_Jr@opd.eop.gov; Andrea_Kane@opd.eop.gov; Phyllis_A_Love%OVP@oa.eop.gov; Elizabeth_J_Potter%OVP@oa.eop.gov; Anne_Whitworth@who.eop.gov; Adrienne_C_Lavallee@who.eop.gov; Barbara_B_Hunt@who.eop.gov; Jonathan_A_Kaplan@opd.eop.gov; Melissa_G_Green@opd.eop.gov; Nicole_L_Davison@opd.eop.gov; Jennifer_M_Palmieri@who.eop.gov; Anne_E_McGuire@who.eop.gov; Jackson_T_Dunn@who.eop.gov; Christine_A_StaneK@who.eop.gov; Linda_L_Moore@who.eop.gov; Ruby_Shamir@opd.eop.gov; Nicole_R_Rabner@who.eop.gov; Stephanie_A_Cutter@who.eop.gov; Courtney_M_Manning@oa.eop.gov; Patrick_M_Dorton@opd.eop.gov; Laura_A_Graham@who.eop.gov; Broderick_Johnson@who.eop.gov; Joel_K_Wiginton@who.eop.gov; Aram_H_Kailian%OVP@oa.eop.gov; Janelle_E_Erickson@who.eop.gov; Kathleen_K_Ahn@who.eop.gov; Lynn_G_Cutler@who.eop.gov; Jonathan_Weiss%OVP@oa.eop.gov; Mary_L_Smith@opd.eop.gov; Dawn_L_Smalls@who.eop.gov; Irma_L_Martinez@who.eop.gov; Lisa_Green@opd.eop.gov
Subject: Reminder: Interagency Working Group on New Markets - 3:00 PM Meeting 8/31

Reminder: There will be an interagency working group meeting on New Markets today at 3:00 PM in the OEOB, Room 231. Please contact Gay Joshlyn at 456-5362 to be cleared in for the meeting. For those who can not attend but would like to participate by phone please use 757-2104 code 3939.

16A - group a to 9th -
no meeting

22/SC
meeting?? - check w/

AGENDA FOR NEW MARKETS MEETING
Room 231 OEOB; 3:00 - 4:00 pm
August 31, 1999

in figs. for
~~Conference of Mayors~~
MCO -
city entity
referred by
HFD

- I. UPCOMING NEW MARKETS EVENTS/ACTIVITIES - MASTER CALENDAR
- II. REPORT ON RECENT EVENTS/ACTIVITIES
- III. ARKANSAS DELIVERABLES
- IV. PREPARATION FOR BRAINSTORMING SESSION
- V. NEW MARKETS DATA/RESEARCH GROUP - MEETING TBD IN MID SEPTEMBER
- VI. LEGISLATIVE UPDATE
- VII. REVIEW OF PHOTOGRAPHS FROM FIRST NEW MARKETS TRIP
- VIII. OTHER ISSUES/QUESTIONS

Management - employment / research/statistics - briefing

e-mail brainstorming

higher lobbyists for Indian Country - connection of Indian Country

BEA - Sept 13 outreach sessions - new place that would be in which

August 1999

Monthly Planner

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1	2 Commerce Annou- cement about Digi- tal Divide Meeting with 25 CEOs - Date TBD	3 Welfare to Work Partnership Confer- ence in Chicago - POTUS, Alvarez, and Herman	4	5 Introduction of Tax Credit Bills and APICs Bills	6 Rainbow/PUSH Co- ference in Chica- go - VPOTUS, Sperling, Alvarez, Herman and Mrs. Gore	7 Rainbow/PUSH Conf- erence in Chicago - VPOTUS, Sperling, Alvarez, Herman and Mrs. Gore																																																																																																		
8 NGA Conference - POTUS	9	10 BusinessLINC Natio- nal Announcement - POTUS, Sperling, Summers, Alvarez	11	12 HUD Appalachian Summit in WV & KY - Cuomo, Herman, Slater, and Glickman	13 HUD Appalachian Summit in WV & KY - Cuomo, Herman, Slater, and Glickman	14																																																																																																		
15	16 Labor Announce- ment of PEPNET Awards	17 SBA Announce- ments on HUBZones	18	19	20 Alvarez Speech in Washington to African American Women on Tour	21																																																																																																		
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26	27	28	29 Native American Lending Study Workshops - Thro- ughout the Fall	30 Commerce Meeting with CEOs on Digi- tal Divide, Date TBD - Daley		<table border="1" style="margin: auto; border-collapse: collapse;"> <tr><td colspan="7" style="text-align: center;">October</td></tr> <tr><td style="text-align: center;">S</td><td style="text-align: center;">M</td><td style="text-align: center;">T</td><td style="text-align: center;">W</td><td style="text-align: center;">T</td><td style="text-align: center;">F</td><td style="text-align: center;">S</td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td style="text-align: center;">1</td><td style="text-align: center;">2</td></tr> <tr><td style="text-align: center;">3</td><td style="text-align: center;">4</td><td style="text-align: center;">5</td><td style="text-align: center;">6</td><td style="text-align: center;">7</td><td style="text-align: center;">8</td><td style="text-align: center;">9</td></tr> <tr><td style="text-align: center;">10</td><td style="text-align: center;">11</td><td style="text-align: center;">12</td><td style="text-align: center;">13</td><td style="text-align: center;">14</td><td style="text-align: center;">15</td><td style="text-align: center;">16</td></tr> <tr><td style="text-align: center;">17</td><td style="text-align: center;">18</td><td style="text-align: center;">19</td><td style="text-align: center;">20</td><td style="text-align: center;">21</td><td style="text-align: center;">22</td><td style="text-align: center;">23</td></tr> <tr><td style="text-align: center;">24</td><td style="text-align: center;">25</td><td style="text-align: center;">26</td><td style="text-align: center;">27</td><td style="text-align: center;">28</td><td style="text-align: center;">29</td><td style="text-align: center;">30</td></tr> <tr><td style="text-align: center;">31</td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </table>	October							S	M	T	W	T	F	S						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31						
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October 1999

Monthly Planner


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Commerce Technology Report or Calendar Sent off to...

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JONATHAN A. KAPLAN

08/10/99 04:51:06 PM

Record Type: Record

To: Lisa Green/OPD/EOP@EOP
cc:
bcc:
Subject: Re: guidance on new markets travel 

My sense is the same as Gene's. We need a regular memo to the President after this initial one (or very detailed entries in the weekly report and in Gene's 8 am memo) on everything that is happening across the administration on new markets. The sense I get is that no one in the White House hears anything about it from us ("Over the next ten days, the following five New Markets activities are taking place . . ."), so -- as is always the case -- people assume nothing is happening or that we are so disorganized that we can't convey to anyone around here, including the President in the weekly report, everything that is happening.

And emails are fine, but we need to tie it together for Gene so that he can convey in a sweeping fashion everything that is happening.

I also think, and this is my own suspicion, that there are other people in the building who would love to have more hands-on control over the entire new markets effort. Bear in mind that Gene will never let that happen. But we bear the responsibility of covering our ass, and Gene's, with Podesta, the VP, and others by showing what has been done and what is coming up (it would be nice to suggest a few ideas for VP events, for example).

All we need is a regular (weekly?), simple update/status memo and we'll be in fine shape. Attach the calendar and we're in even better shape. Suggest to Gene that we hold another principals meeting and give him a draft agenda and we're in tip-top shape.


JK

Lisa Green



Lisa Green
08/10/99 04:34:16 PM

Record Type: Record

To: Jonathan A. Kaplan/OPD/EOP@EOP
cc:
Subject: Re: guidance on new markets travel 

Yes, we are aware of this event. I have a hard time getting Gene's time to focus on the New Markets

Initiative as it relates to White House priorities that are happening within a 24 hour time period. There has been little time to discuss with him what is happening among the agencies in advance. I am maintaining a calendar which has all of the agencies New Markets activities on it, and all of the agencies plus internal White House staff including Communications are invited to the weekly New Markets meetings. Perhaps, Patrick and I should sit down and talk about the Press strategy as it relates to what's on the calendar, but I assume we'll need Gene's guidance before we can proceed.

I don't think this conference is going to get huge news or that it's really an opportunity to amplify in a major way. Although it is covering Appalachia and there will be some New Markets discussions it is more focused on housing because it is a HUD conference. We don't want to mix messages here too much. It's not clear to me what the CEA chairman is being asked to talk about specifically. I think we would rather wait to have him talk if for example we did a conference on market data/research for New Markets which has been proposed.

Lastly, Gene did request over the weekend at the PUSH Conference that I draft a memo to the President summarizing all of the New Markets activities (which I have been updating Gene on regularly by e-mail). I am working on it and hope to have something to him tomorrow.

**Where and why are you getting the feeling that people think we are not on top of New Markets?
Can you please provide me with specifics.**



Hildy Kuryk
08/03/99 05:40:03 PM



Record Type: Record

To: Lisa Green/OPD/EOP@EOP

cc:

Subject: New Markets

I was wondering, since I will be working with Joel on New Markets, whether you could add me to any email list you may have regarding meetings and events. I would love to be in the loop. I really appreciate it. If you have any questions please feel free to call 6-6493.

Thanks,

Hildy

New Markets Follow-Up Timeline¹
U.S. Department of Labor
(July 27, 1999)

July 19, 1999 - Address to National Association of Counties Annual Meeting, St. Louis.

July 20, 1999 - Radio Interview with Tom Joyner Show (national audience)

August 3-4, 1999 - Welfare-to-Work Promising Practices Conference (w/ POTUS, Secretaries Daley, Slater and Administrator Alvarez), Chicago

August 5, 1999 - Opening of Chicago Job Corps Center

August 12-13, 1999 - Appalachia Summit (w/ Secretaries Cuomo, Glickman and Slater), Kentucky and West Virginia (possible)

September 16, 1999 - PEPNET Awards, Washington, D.C.

September 1999 - Back-to-School Event (Location/Date TBD)

September 1999 - Welfare-to-Work Third Round Competitive Grants Announcement (Location/Date TBD)

September/October 1999 - Foundation Roundtable on Youth and Screening of PSAs (New York, Date TBD)

September 27, 1999 - Boston Economic Summit (w/ Senator Kennedy) (message TBD)

October 1999 - MOU signing with CNS, DOJ and DOD

December 1999/January 2000 - Youth Opportunities Grant Announcements (location TBD)

¹NOTE: All events are with the Secretary, unless otherwise noted

Withdrawal/Redaction Marker

Clinton Library

DOCUMENT NO. AND TYPE	SUBJECT/TITLE	DATE	RESTRICTION
001. paper	Chris Roubideaux; RE: personal info [partial] (1 page)	n.d.	P6/b(6)

COLLECTION:

Clinton Presidential Records
Policy Development
Lisa Green
OA/Box Number: 20586

FOLDER TITLE:

[New Markets Agenda & Meetings] [loose]

2012-0043-S

ms236

RESTRICTION CODES

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

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

P1 National Security Classified Information [(a)(1) of the PRA]
P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
P3 Release would violate a Federal statute [(a)(3) of the PRA]
P4 Release would disclose trade secrets or confidential commercial or financial information [(a)(4) of the PRA]
P5 Release would disclose confidential advice between the President and his advisors, or between such advisors [(a)(5) of the PRA]
P6 Release would constitute a clearly unwarranted invasion of personal privacy [(a)(6) of the PRA]

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RR. Document will be reviewed upon request.

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b(6) Release would constitute a clearly unwarranted invasion of personal privacy [(b)(6) of the FOIA]
b(7) Release would disclose information compiled for law enforcement purposes [(b)(7) of the FOIA]
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]

CHRIS ROUBIDEAUX
Box 78
Porcupine, South Dakota 57772

[001]

Contact: Rose Kocer (605) 867-1503 or 2069

Chris Roubideaux is an enrolled member of the Oglala Sioux Tribe in the Pine Ridge Indian Reservation in South Dakota. He is 42 years old and was born and raised at Pine Ridge. He is also a graduate of Pine Ridge High School.

Chris is currently an employee of the Wakanyuja Un Wowasi (Work for Children) program, a Department of Labor competitive Welfare-to-Work grantee. Prior to coming to work for the welfare to work program, Chris had worked sporadically at different jobs. At the time he was hired for this program, he was a current TANF recipient.

Mr. Roubideaux is a single father of 5 children: 4 girls, ages 14, 13 and a set of twin girls age 5; one 7-year old son, Isaac. Being a single parent has proved difficult when trying to secure and keep employment. The children's mother is a resident of Denver, Colorado and doesn't have much contact with Chris or the children. He receives no child support. Single parenting has been hard on Chris, but he has struggled to overcome barriers and still maintains a safe home for his children.

Currently, Chris is not only working as a Liaison for the Oglala Lakota College welfare to work program, but is also enrolled as a full-time student at Oglala Lakota College. He is pursuing a Bachelor's degree in Human Services and will graduate in 2001 – a remarkable accomplishment for a single working parent of 5 children.

In his current position as a Liaison for the welfare to work program, Mr. Roubideaux is a full-time employee with full benefits. He has been working with the program since April P6/(b)(6)

P6/(b)(6) In this position, Chris is responsible for client intake, often from referrals from the TANF agency, career assessment, and works with local workforce development staff and employers to secure placement for his clients. The Oglala Lakota College is very supportive of Chris's educational goals and offers him a flexible work schedule allowing him to work full-time and maintain a full-time class load at the college. Chris plans to stay with the Oglala welfare to work program through its duration. The college is in the process of applying for the DOL Youth Opportunity grants. If successful, Mr. Roubideaux would be interested in helping Pine Ridge youth through that program as well.

Mr. Roubideaux is also a very active and a strong believer in the Seven Spiritual rites the Lakota. That belief has proved to be the strength that carries him when he struggles with the problems he faces raising his children alone. Yet, he perseveres. Mr. Roubideaux is truly a remarkable example of a success story and should be applauded for his efforts as a male role model on the Pine Ridge Reservation – a place where few fathers take an active role in their

children's live, let alone raise them single-handedly.

Handwritten signature

**AGENDA FOR NEW MARKETS
MEETING**
Room 476 OEOP; 3:00 - 4:00 pm
July 20, 1999

I. REPORT ON TRIP AND STATUS OF THE NEW MARKETS INITIATIVE

II. ONGOING INTERAGENCY WORKING GROUP MEETINGS

III. MASTER SCHEDULE FOR DELIVERABLES

- Cabinet Deliverables (grant announcements related to New Markets; cabinet visits to the six communities visited on trip, etc.)
- Other Public Sector Deliverables (i.e., Executive Order for New Markets Data Collection)
- Unannounced Corporate Deliverables
- Other Deliverables not Closed Prior to the Tour

*→ Federal Portfolio in New
SAs from Col. [unclear]*

IV. CEO FOLLOWUP - *Bridge of Corporate Community*

*→ Capitalization Conference
August 12th - 13th*

V. COMMUNICATIONS MATERIAL ON NEW MARKETS

- Consistency
- Definition of New Markets
- Legislative Materials

*- 9/15 SBA, COE I
Conference - Business
C.O.C.
and financial
institutions*

VI. LEGISLATIVE STRATEGY

- Introduction of Legislation
- Legislative Event (TBD) - *2:00 (M.L.C. by mail at 2:00)*

VII. UPCOMING/ONGOING NEW MARKETS EVENTS

- Cabinet Events - POTUS/VP right of first refusal
- BusinessLINC/The Business Roundtable -- National Announcement (August)
- Arkansas Visit to the Delta (August)
- Newark, NJ/New Jersey Nets Event (Fall)
- 2nd New Markets Tour (Fall)
- Process for Maintaining New Markets Events Calendar with Cabinet Affairs

*Principal
Meeting*

**AGENDA FOR
NEW MARKETS MEETING**

Room 180 OEOB; 4:30 – 5:30 PM

July 15, 1999

- I. REPORT ON THE TRIP AND STATUS OF THE NEW MARKETS INITIATIVE**
- II. DISCUSSION OF ONGOING PROCESS AND COORDINATION**
- Unified and Inclusive Effort
 - Regular Interagency Staff Meetings
- III. FOLLOW THROUGH ON TRIP**
- Ideas and Suggestions on Future Events with the President
 - Possible Cabinet Events Amplifying New Markets Message
 - Discussion of Process for Tracking and Announcing New Markets Deliverables
 - Future Ongoing Efforts
- IV. LEGISLATIVE STRATEGY**
- The Republican Proposal – The American Community Renewal Act: H.R. 815
 - Introduction of Legislation
 - Proposed Legislative Event (TBD)

DRAFT
AGENDA FOR NEW MARKETS
MEETING

Room 476 OEOB; 3:00 – 4:00 pm
July 20, 1999

- I. REPORT ON TRIP AND STATUS OF THE NEW MARKETS INITIATIVE**
- II. ONGOING INTERAGENCY WORKING GROUP MEETINGS**
- III. MASTER SCHEDULE FOR DELIVERABLES**
- Cabinet Deliverables (i.e., grant announcements related to New Markets; cabinet visits to the six communities visited on trip)
 - Other Public Sector Deliverables (i.e., Executive Order for New Markets Data collection)
 - Unannounced corporate deliverables
 - Other deliverables not closed prior to the tour
- IV. CEO FOLLOWUP**
- V. LEGISLATIVE STRATEGY**
- Introduction of Legislation
 - Legislative Event (TBD)
- VI. UPCOMING/ONGOING NEW MARKETS EVENTS**
- Cabinet Events – POTUS/VP right of first refusal
 - BusinessLINC/The Business Roundtable -- National Announcement (August)
 - Arkansas Visit to the Delta (August)
 - Newark, NJ/New Jersey Nets Event (Fall)
 - 2nd New Markets Tour (Fall)
 - Process for Maintaining New Markets Events Calendar with Cabinet Affairs

Cecil H. King



Sonya Matthews

07/15/99 02:53:47 PM



Record Type: Record

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

cc: Lisa Green/OPD/EOP@ECP

Subject: New Markets Interagency Trip Followup Meeting

Lisa Green and Jonathan Kaplan would like you to join them on Tuesday, July 20th at 3:00 pm in room 476 OEOB. The purpose of this meeting is to report back to the group about the highlights of the trip and to discuss followup. If you have any questions, please reply through this e-mail or by calling me on 456-5351. Thank you.

Message Sent To: _____

Anne Whitworth/WHO/EOP@EOP
Adrienne C. Lavalley/WHO/EOP@EOP
Barbara B. Hunt/WHO/EOP@EOP
Bridget T. Leininger/WHO/EOP@EOP
Joel K. Wiginton/WHO/EOP@EOP
Andrew J. Mayock/WHO/EOP@EOP
Lowell A. Weiss/WHO/EOP@EOP
Mindy E. Myers/WHO/EOP@EOP
Lisa Green/OPD/ECP@EOP
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Cheryl M. Carter/WHO/EOP@EOP
Jackson T. Dunn/WHO/EOP@EOP
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Ruby Shamir/OPD/EOP@EOP
Nicole R. Rabner/WHO/EOP@EOP
Stephanie A. Cutter/WHO/EOP@EOP
Melissa G. Green/OPD/EOP@EOP
Patrick M. Dorton/OPD/EOP@EOP
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susan_m._wachter@hud.gov @ inet

doris_l._lesesne@hud.gov @ inet

Alison

Hub Zone Program

job creation program

Don't try to be involved in this
200 or 300 units

Planned August Start

few weekly meetings
Event Ideas
master schedule
Coordinating piece of paper

knowing when other events are taking place
* make sure Anne is there at all meetings - go about 15 mins to help
Tallying Park

Hansen

Legislative Track - what are we doing

R&R - results and not factors

* master schedule - message standpoint / Calendar that allows help to maintain
- submitted of ideas that will be used

Cabinet Amplification - New Market Activities
- branding strategy

Could be announced as part of Glickman's weekly meeting

Paley

visits to 4 spots - to travel to new markets activities
on these cities - anything should be considered new markets

* so in November - the President can say: my Cabinet has been set as a whole

Glickman

\$65 million in business loans for rural areas
several million in New Markets

list of what's coming down the pipe

HUD/Census

what is difference between New Markets and geographic definition
grants in low income communities
- a program or a place?
- a NM

Gene

every place we can do more public infrastructure than

THE WHITE HOUSE
WASHINGTON

*Notes
John Principale
Andy*

**AGENDA FOR
NEW MARKETS MEETING**
*Room 180 OEOB; 4:30 – 5:30 PM
July 15, 1999*

I. REPORT ON THE TRIP AND STATUS OF THE NEW MARKETS INITIATIVE

II. DISCUSSION OF ONGOING PROCESS AND COORDINATION

- Unified and Inclusive Effort
- Regular Interagency Staff Meetings *— right of 1st refusal when there are events*

III. FOLLOW THROUGH ON TRIP

- Ideas and Suggestions on Future Events with the President
- Possible Cabinet Events Amplifying New Markets Message
- Discussion of Process for Tracking and Announcing New Markets Deliverables
- Future Ongoing Efforts

IV. LEGISLATIVE STRATEGY

- The Republican Proposal – The American Community Renewal Act: H.R. 815
- Introduction of Legislation
- Proposed Legislative Event (TBD)

Gene

- in sit plan visited the definition is much broader
- cabinet should be gay back

Tally Points

we will circulate a P.A.M.

Legislation

President's intention is to make a compromise offer

NMUC and APICs - Talent will take in credits to
SBIC programs

and the way would provide Tax credit

could end up as a fight

Separate plan on sit sites

plus definition
of New York

THE WHITE HOUSE
WASHINGTON

**AGENDA FOR
NEW MARKETS MEETING**
Room 180 OEOP; 4:30 – 5:30 PM
July 15, 1999

- I. REPORT ON THE TRIP AND STATUS OF THE NEW MARKETS INITIATIVE**
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- The Republican Proposal – The American Community Renewal Act: H.R. 815
 - Introduction of Legislation
 - Proposed Legislative Event (TBD)

Summary

what is a New Market need a definition

large private investment into those areas

not just leading programs but

only lack of expertise and lack of equity capital

clips - getting credit for 2 steps

(1) lowering private capital

(2) providing equity per place

How do we position next to other programs

is this an approach to regional economic development
or is it a solution to poor communities

Issue

needs to make geographic barriers

Issues

(1) Legislative fight around package

(2) send people to places the product needed - go back with
specific deliverables

Issues

the definition of new markets is going to the next level
building up on 52s and ECs

Issue

new markets ^{was} President's Challenge to get new equity capital

(1) Investments by corporations

bipartisan support before Congress) and an increase of \$15 million over FY 99 levels.

Microenterprise Lending and Technical Assistance. Microenterprise initiatives in the FY 2000 budget include: (1) PRIME, under which the CDFI Fund will provide microenterprise technical assistance and capacity building program to award grants on a competitive basis to microenterprise development organizations and programs that focus on low-income entrepreneurs; (2) doubling support for technical assistance in SBA's Microloan Program, which links loans entrepreneurs with the provision of training and technical assistance; (3) doubling support for SBA lending to leverage over \$75 million in new microlending; (4) doubling funding for Individual Development Accounts (IDAs), to empower lower-income individuals to start a new business, invest in a first home, or save for post-secondary education; and (5) tripling funding for SBA's One-Stop Capital Shops, which offer microenterprise development (including direct access to microlenders), personal finance, and even credit repair services in Empowerment Zones.

Budget impact: *(1) As described above, PRIME will cost \$15 million in FY 2000; (2) SBA's microloan technical assistance and training will cost \$ 32 million in FY 2000 (up from \$16 million in FY 99); (3) SBA's microlending will cost \$5 million in credit subsidy (up from \$3 million in FY 99); (4) IDAs will cost \$20 million in FY 2000 (up from \$10 million in FY 99); and (5) One-Stop Capital Shops will cost \$10 million in FY 2000 up from \$3.1 million in FY 99.*

BusinessLINC. The President's budget provides resources to expand BusinessLINC -- an innovative public-private partnership launched by Vice President Gore and led by Treasury Secretary Rubin and SBA Administrator Alvarez --to new markets in economically distressed communities. BusinessLINC (Learning, Information, Networking and Collaboration) is designed to encourage large businesses to work with small business owners and entrepreneurs in order to improve the economic competitiveness of smaller firms located in distressed areas, both urban and rural. The funds will be used to leverage private sector efforts to spur new BusinessLINC partnerships at the national and local level.

Budget Impact: *BusinessLINC will cost \$3 million in FY 2000.*

Specialized Small Business Investment Companies (SSBICs). The President's budget will expand current tax incentives to increase the amount of equity capital available to economically disadvantaged people by making it easier for Specialized Small Business Investment Companies (SSBICs) to qualify as tax-favored regulated investment companies.

Budget Impact: *This change to tax rules will have a negligible budget impact.*

Sure
not every thing happens in these markets is not
New Markets

Always
learning new ideas, progress, the next steps

Sure
retail marketization of the private sector to invest
in underserved markets - government funds
to provide the same incentives we provide
in business - this is a retail challenge

Always
general debate between equity issues come about
what is our approach

Sure - 3rd way
private examples of how the 3rd way can work
this is different because it's retail
if not now when
highlight private sector equity investment

businesses before they must produce a return. In addition, SBA will conduct an aggressive outreach campaign around the country to promote LMI investments.

Budget impact: *No new loan subsidy budget authority is required for this initiative as the SBIC debentures program has a 0% credit subsidy rate. However, the commitment level for the SBIC debenture program must be increased (from \$640 million in FY 99 to \$800 million in FY 2000) in order to ensure that the new targeted activity does not crowd out activity by traditional SBICs.*

New Markets Venture Capital Firms (NMVCs). There are thousands of inner-city and rural entrepreneurs who need both capital and expert guidance to transform their small businesses and great ideas into thriving companies. SBA will select ten-to-twenty NMVC firms whose management has successful records in community-based venture capital. The equity funds of private investors will be matched with loan guarantees of up to \$10 million per NMVC, with interest on the debt deferred. Investors must also provide at least \$1.5 million in technical assistance over five years to the target firms, matching SBA's grants of technical assistance. The program should provide long-term, patient growth capital and facilitate critically needed technology and management skills development for smaller businesses in new markets.

Budget impact: *The NMVC firms will cost \$15 million in credit subsidy for loan guarantees (at a credit subsidy rate of 15%, allowing \$100 million in government guarantees) and \$30 million for technical assistance grants.*

New Markets Lending Companies (NMLC). For the first time in many years, SBA will approve approximately 10 new non-bank lenders -- firms authorized to originate loans under SBA's largest loan program -- the 7(a) General Business Loan Guaranty program. Under the 7(a) program, SBA guarantees up to 80% of a loan that is made by a lender to a creditworthy small business that cannot otherwise secure financing on reasonable terms. The firms selected must have a strategy to target their lending to underserved areas.

Budget Impact: *No additional budget authority is necessary to license these new non-bank lenders.*

Continued Growth for CDFIs. Community Development Financial Institutions (CDFIs), locally-based institutions with expertise in lending and investment in underserved areas, represent an important vehicle for greater investment in new markets. The federal contribution to building these institutions must continue to grow.

Budget impact: *The CDFI Fund will cost \$125 million in FY 2000, including \$15 million for new microenterprise activities under the Program for Investments in Microentrepreneurs (PRIME) Act (now pending with*

Talking Points

Government structure to ~~provide~~ ^{attract} investment
catalyzing private investment in ~~poor~~ ^{poor} ~~new~~ markets

President's challenge goals - results can be
achieved without legislation
use of budget

Stimulus

redesigning the game, redesigning the economy

job creation is an opportunity

new definitions - new market for the investment of
resources

It's not a Poverty Tax - New Definition / Investment Tax

THE NEW MARKETS INITIATIVE: BUDGET IMPACT

The New Markets initiative will prompt approximately \$15 billion in new investment in urban and rural areas over five years through:

The New Markets Tax Credit --To help spur \$6 billion in new equity capital for investment in America's New Markets, the New Markets Tax Credit will be worth up to 25 percent for investments in a wide range of vehicles serving these communities, including community development banks, venture funds and corporations, new investment company programs (targeted SBICs, NMVC firms, and APICs -- see descriptions below), and other targeted investment funds. Credits would be allocated to the targeted investment vehicles which could use the tax credits to attract investors. The investment funds would make their own decisions about what investments or loans to make to help create and grow businesses in the New Markets. A wide range of businesses could be financed by these investment funds, including small technology firms, inner-city shopping centers, manufacturers with hundreds of employees, and retail stores.

Budget Impact: *The New Markets Tax Credit will cost approximately \$980 million over five years.*

America's Private Investment Companies (APICs). For years, America has supported OPIC, the Overseas Private Investment Corporation, to promote growth in emerging markets abroad. Now we must do the same thing in America's New Markets. Under this program, investors will put equity into new private investment partnerships to be known as America's Private Investment Companies (APICs). HUD and SBA working together will provide up to two times the private capital in loan guarantees for each. APICs will make equity investments in larger businesses that are expanding or relocating in inner cities and rural areas. Under the financing structure, the private investors' funds are at risk ahead of the government.

Budget impact: *APICs will cost \$36 million in credit subsidy (at a rate of 3.6%, allowing up to \$1 billion in government guarantees) and \$1 million for HUD's administrative costs.*

SBICs Targeted to New Markets. Over 40 years, the SBA's small business investment company (SBIC) program has provided roughly \$20 billion in equity and debt financing to more than 85,000 different companies, helping them at a critical stage to grow from small businesses to household names, like AOL and Staples. However, too little of the capital invested has benefited our cities and rural distressed communities. Last summer, the Vice President challenged the SBA to find ways to meet better the needs of minority firms and underserved markets. In response, SBA determined that, under existing legislation, the Agency can offer more flexibility and new financing terms to make it more attractive for SBICs to invest in businesses in low and moderate income (LMI) areas. Specifically, SBICs making LMI investments will be eligible for a new type of federally guaranteed loan to augment their capital for business investment. Interest on the guaranteed funding will be deferred for the first five years of the 10-year term to give SBICs more time to nurture their investments in small

New Docs
Paul
Page
July 13

NM
Post Trip (Plan)

**AGENDA FOR NEW MARKETS
MEETING**
*Roosevelt Room; 2:00-3:00pm
July 14, 1999*

I. IMMEDIATE ACTION ITEMS

- Coordination of correspondence, including Thank You's (from NEC, OPL, etc.)
- Mailing Lists and Coordination of Inquiries
- IGA Activities (i.e., involvement of governors -- NGA conference, and mayors)
- OPL Activities (i.e., requests from chambers of commerce, outreach/coordination with non-profit community)
- Legislative Strategy
- Communications Strategy (distribution of clippings, use of Web Page, video clips, etc.)

II. UPCOMING NEW MARKETS EVENTS

- Legislative Event (TBD)
- BusinessLINC/The Business Roundtable -- National Announcement (August 10)
- Arkansas Visit to the Delta (August 5th - 6th?)
- Newark, NJ/New Jersey Nets Event (TBD in the Fall)
- 2nd New Markets Tour (to follow New Jersey event?)

III. DELIVERABLES

- Plains Indians Meeting Follow-Up (Lynn Cutler)
- Unannounced public sector deliverables (i.e., Executive Order for New Markets Data collection)
- Unannounced corporate deliverables (i.e., Dreamworks program for disadvantaged youth training)
- Other deliverables from agencies that were not closed prior to the tour

NEW MARKETS FOLLOW -UP

- To continue to get the President's message out
- To keep communication with CEOs open and forward looking
- To reach out to prominent figures who have a great concern and interest in America's New Markets
- To garner support for upcoming legislative battle

PRESS

- E.J. Dionne 202/797-6067
- Jason DePearle 202//862-0393
- Jonthan Alter 212/445-4364
- Bob Hershey 212/556-7229
- Ron Brownstein 202/861-9232
- Jerry Seib 202/862-9225

CORPORATE LEADERS

- Sandy Weill 212/793-8888
- Ray Chamber 973/540-9148
- Lou Katz 609/667-6440

CONGRESSIONAL MEMBERS

- Senator Daschle 202/224-5556
- Congressman Ford 202/225-3265

INTEREST GROUPS

- Hugh Price 212/558-5300
- Kwesi Imfumee 410/358-8900
- Roger Wilkins 703/993-2162
- Bart Harvey 410/772-2498

CELEBRITIES

- Isiah Thomas
- Majic Johnson

248/723-8456

310/247-2033

Ordinary Party

7/21/99

Jimmy Wilson letter re: what my unit to accomplish before
Club leaves office
(Anthony
in Address)

Carroll Willis @ same time about need to meet at regional level
in Little Rock or the Delta

V.P. visit for fundraising

August Meeting

Main Committee

Plan new Saturday - ^{regional} monthly meeting in Little Rock
w/ some ~~of~~ ^{of} ~~the~~ ^{the} ~~meeting~~ - fundraising

Status Indignity Report not to be due until October or later

→ Looking Party to discuss what to be done
what needs to be done

monthly
Status report

Budget issues - what will be proposed

on list of things requested - Willis letter - Michael D will
work on

Ordinary

Helena
alpha party



Lisa Green
07/19/99 05:20:53 PM

*Blackman
Sent with Pro
Post Trip
Update Plans*

Record Type: Record

To: See the distribution list at the bottom of this message
cc: See the distribution list at the bottom of this message
Subject: Reminder: New Markets Interagency Trip Followup Meeting

REMINDER NOTICE: There will be an interagency working group meeting tomorrow, July 20th at 3:00 PM in Room 476 OEOP to discuss followup from the New Markets Trip.

If you have not done so already through Sonyia Matthews, please provide clearance information to Gay Joshlyn at 456-5362. Thank you.

----- Forwarded by Lisa Green/OPD/EOP on 07/19/99 05:20 PM -----



Sonyia Matthews
07/15/99 02:53:47 PM



Record Type: Record

To: See the distribution list at the bottom of this message
cc: Lisa Green/OPD/EOP@EOP
Subject: New Markets Interagency Trip Followup Meeting

Lisa Green and Jonathan Kaplan would like you to join them on Tuesday, July 20th at 3:00 pm in room 476 OEOP. The purpose of this meeting is to report back to the group about the highlights of the trip and to discuss followup. If you have any questions, please reply through this e-mail or by calling me on 456-5351. Thank you.

Message Sent To: _____

Anne Whitworth/WHO/EOP@EOP
Adrienne C. Lavalley/WHO/EOP@EOP
Barbara B. Hunt/WHO/EOP@EOP
Bridget T. Leininger/WHO/EOP@EOP
Joel K. Wiginton/WHO/EOP@EOP
Andrew J. Mayock/WHO/EOP@EOP
Lowell A. Weiss/WHO/EOP@EOP
Mindy E. Myers/WHO/EOP@EOP
Lisa Green/OPD/EOP@EOP
Jonathan A. Kaplan/OPD/EOP@EOP
Pieter J. Boelhouwer/OVP@OVP
Alvin Brown/OVP@OVP
Jennifer M. Palmieri/WHO/EOP@EOP
Anne E. McGuire/WHO/EOP@EOP
Cheryl M. Carter/WHO/EOP@EOP
Jackson T. Dunn/WHO/EOP@EOP
Linda L. Moore/WHO/EOP@EOP
Ruby Shamir/OPD/EOP@EOP
Nicole R. Rabner/WHO/EOP@EOP
Stephanie A. Cutter/WHO/EOP@EOP
Melissa G. Green/OPD/EOP@EOP
Patrick M. Dorton/OPD/EOP@EOP
Laura A. Graham/WHO/EOP@EOP
Broderick Johnson/WHO/EOP@EOP
Audrey Choi/CEA/EOP@EOP
Aram H. Kailian/OVP@OVP
Andrew F. Schneider/OVP@OVP
Joshua S. Gottheimer/WHO/EOP@EOP
Jocelyn A. Bucaro/WHO/EOP@EOP
Robert B. Johnson/WHO/EOP@EOP
Kathleen K. Ahn/WHO/EOP@EOP
Thomas D. Janenda/WHO/EOP@EOP
Lynn G. Cutler/WHO/EOP@EOP
Jonathan Weiss/OVP@OVP
Laura A. Graham/WHO/EOP@EOP
Ann C. Hertelendy/WHO/EOP@EOP
jorszag@doc.gov @ inet
shawkins@doc.gov @ inet
justin.paschal@usda.gov
irma.tucker@do.treas.gov @ inet
michael.barr@do.treas.gov @ inet
jonesm@cdfi.treas.gov
norma.jean.sponaugle@ost.dot.gov @ inet
ba.rudolph@ost.dot.gov @ inet
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hayes-pamela@dol.gov @ inet
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brandon-tiffany@dol.gov @ inet
saunders.miller@sba.gov @ inet
millicent.hodge@sba.gov @ inet
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scott_sherman@hud.gov @ inet
susan_m._wachter@hud.gov @ inet

doris_l._lesesne@hud.gov @ inet

Message Sent To:

Anne Whitworth/WHO/EOP@EOP
Adrienne C. Lavalley/WHO/EOP@EOP
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Nicole R. Rabner/WHO/EOP@EOP
Stephanie A. Cutter/WHO/EOP@EOP
Courtney M. Manning/WHO/EOP
Patrick M. Dorton/OPD/EOP@EOP
Laura A. Graham/WHO/EOP@EOP
Broderick Johnson/WHO/EOP@EOP
Joel K. Wiginton/WHO/EOP
Aram H. Kailian/OVP@OVP
Robert B. Johnson/WHO/EOP@EOP
Kathleen K. Ahn/WHO/EOP@EOP
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Jonathan Weiss/OVP@OVP
Phyliss Love
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justin.paschal@usda.gov @ inet
irma.tucker@do.treas.gov @ inet
michael.barr@do.treas.gov @ inet
jonesm@cdfi.treas.gov @ inet
norma.jean.sponaugle@ost.dot.gov @ inet
ba.rudolph@ost.dot.gov @ inet
marianne.smith@ost.dot.gov @ inet
eugene.conti@ost.dot.gov @ inet
albert.eisenberg@ost.dot.gov @ inet
bart.chilton@usda.gov @ inet
clyde.williams@usda.gov @ inet
hayes-pamela@dol.gov @ inet
heyman-stephen@dol.gov @ inet
brandon-tiffany@dol.gov @ inet
saunders.miller@sba.gov @ inet
millicent.hodge@sba.gov @ inet
Michele.kreiss@sba.gov @ inet
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jacquie_m._lawing@hud.gov @ inet
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susan_m._wachter@hud.gov @ inet
doris_l._lesesne@hud.gov @ inet

July 12, 1999

Clinton
Gore

Dear

Earlier this summer I wrote to you about the President's plans to take a New Markets Tour through several of America's economically distressed communities. Last week the President traveled throughout the nation to highlight the need and potential for private investment in areas of the country that have not fully participated in the current economic boom. Many corporate leaders including Dick Huber from Aetna and Sandy Weill from Citigroup accompanied the President on this historic trip. Their participation has helped to generate tremendous enthusiasm for the New Markets Initiative, which is our proposal for improving conditions in underserved areas through government loan guarantees and tax incentives.

The New Markets Tour has created momentum to mobilize more private sector partnerships and generate additional new investments in economically distressed areas. The President is committed to working on this effort through the remainder of his term to bring economic prosperity to all parts of the nation, insuring that no one is left behind. However, the excitement generated by the President's New Markets Trip is just a beginning and we recognize that we can not do it alone.

We need your continued support to build upon the success of this trip and to ensure that measurable and lasting changes take place in those communities that deserve to be a part of this country's current economic expansion. The President recognizes that we need to attract more private funds to America's New Markets. To do so we need ideas and investment commitments from corporate leaders, like you. I would like to encourage you to send me your suggestions – whether old or new. Call me or come meet with me to discuss your ideas and to make commitments that will help attract other private sector investment to impoverished, untapped markets throughout the nation.

In the next few weeks we will send legislation to Congress. We want to work with Republicans in a cooperative manner and are willing to incorporate their ideas to secure passage of the New Markets legislation. In addition to introducing the legislation, we are planning several events that will continue to shine a spotlight on the need for investment in New Markets. These upcoming events include (1) the announcement of a national BusinessLINC partnership, which will encourage mentoring by large businesses to small businesses through the existing and highly successful BusinessLINC (Learning, Information, Networking, and Collaboration) program created under the Clinton-Gore administration; (2) a visit to Newark, NJ this fall, bringing attention to innovative investment partnerships that benefit poor communities, such as that

developed by the New Jersey Nets and the Community Youth Organization, a group dedicated to improving the quality of life for disadvantaged youth.

We welcome your participation in these events, but we also want your ideas and your commitment to invest in New Markets. We need your support to build upon the success of this trip and ensure that measurable and lasting changes take place in underserved communities that deserve to be a part of this country's current economic expansion. I hope to hear from you soon to discuss and explore ways in which your company can become involved.

Sincerely yours,

Gene Sperling
Assistant to the President for Economic Policy
and Economic Advisor to the President

JONATHAN A. KAPLAN

07/16/99 08:55:09 AM

*For
AGWDA*

Record Type: Record

To: Lisa Green/OPD/EOP@EOP

cc:

Subject: New Markets interagency

Yesterday's meeting serves as a helpful kickoff for the post-trip interagency process. You can start the next meeting saying that there was broad agreement among our principals on how to approach this process. I think that the agenda for each meeting should include, among other items, the following "resolved" matters:

Cabinet deliverables (public or private) for New Markets

- POTUS/VP right of first refusal

Follow up in six sites

- deliverables
- visits

Master schedule/calendar of NM activities (have intern start drafting)

*** We also may want to hand out a kind of mission statement for New Markets and a set of talking points, as well as the three big packets we gave out yesterday.

Small following a
trip

Personal correspondence
signed autographs, personal notes
Separate meeting

NGA Conference - August 7th
introduce resolution supporting legislation

August 12-13th ARC - TV meeting - resolution support

Janklow, Hill, Republican Governors

Clips

Legislation - earliest date is end of July

announcement full year after the fact
rather than a big news event

Business Inc - pressing on the committees
D.C. business making relationships] committees exist
meeting

O.V.P. wants to be involved

Arkansas Delta - separate meeting
instead meeting just - things we could have done
better

this is what we were looking for
to be clear on what goals are
strong is going to be an Arkansas partner
are we trying to stamp new markets
- deliverables

Newark's event = 3rd Tour

1st week in November directly after elections
3rd, 4th, 5th ??

a one day tour a tour separately ??

form agreement

2 day tour vs. 3 to 4 days
quality control

* End of July for planning on 3rd Tour

DELIVERABLES

Plans Indiana [New Markets]
vs. FO & other stuff

Event in Oval Office ??

OMB Budget - a NA Budget - opportunity to
make a difference

7-20-99

THE WHITE HOUSE
WASHINGTON

July 16, 1999

copied
Lockhart
Spurling
Podesta
Ucelli
Photo Office

MEMORANDUM FOR THE PRESIDENT

FROM: JOE LOCKHART
GENE SPERLING
LORETTA UCELLI

SUBJECT: MEDIA COVERAGE OF THE NEW MARKETS TOUR

We wanted to forward to you a compilation of national and regional print and television news coverage from your recent New Markets tour. Your tour received excellent local and television coverage, as well as coverage by all major national newspapers.

We are circulating this packet to White House staff and others who worked to put this trip together.

I Need to get a photo
album for my personal collection
should be over for bus leaders
and Congressmen on Friday
should be out of business to receive
people I was with —
and soon —

The President's New Markets Tour

July 5-8, 1999



Overview and Press Summary

~~Handwritten~~
~~Blank~~
Sweet of Bond
@ NGA

Children Center - 2. St. Sem

For Mobile View
A/2/1

**AGENDA FOR NEW MARKETS
MEETING**

*Room 231 OEOB; 3:00 – 4:00 pm
July 27, 1999*

- I. **UPCOMING NEW MARKETS EVENTS/ACTIVITIES – MASTER CALENDAR**
 - Cabinet Events
 - BusinessLINC/The Business Roundtable -- National Announcement (August)
 - Possible DC Event
 - Arkansas Visit to the Delta (Fall)
 - Newark, NJ/New Jersey Nets Event (Fall)
 - 2nd New Markets Tour (Fall)
- II. **PROCESS FOR MAINTAINING NEW MARKETS EVENTS CALENDARS**
- III. **CORRESPONDENCE AND PHOTOS FROM THE WHITE HOUSE ON THE TRIP**
- IV. **NEW MARKETS DATA/RESEARCH GROUP – EXECUTIVE ORDER**
- V. **COMMUNICATIONS MATERIALS – PAPER FOR NEW MARKETS**
- VI. **LEGISLATIVE ISSUES**
 - Introduction of Legislation
 - Sponsorship List
 - Briefings
 - Legislative Event (August 8) or 4th 22

VII. OTHER ISSUES/QUESTIONS

also industry
*e-mail CRA guidelines
send list of data group*

*Pine Ridge
Support*

Concept Summaries

- A. Business: Fenske Printing Company
Contact: David Fenske 605/343-6070
Address: Rapid City, South Dakota
Summary: The Fensky Printing Company has been incorporated in the state of South Dakota for over 33 years. The company specializes in direct mail fund-raising efforts. They have developed areas of specialty as well as formulated methods of strategic thinking and how to contact unknown donors in the area of fund-raising. They currently work with tribes in Montana, Arizona, and South Dakota to explore fund-raising possibilities. The benefits are that 1) each tribe is individually responsible for the money that is raised, 2) an investment is made in the young people from the tribe who learn the business, 3) the tribe is able to become a direct marketer, and 4) the tribes create web sites to enable fund-raising efforts. Currently, Mr. Fenske has not developed a formalized educational process. The set of skills he teaches is unique and requires exposure to specialized equipment. He envisions bringing tribal members to his company for two days of the week to gain hands-on experience with the equipment. The remaining three days of the week would be spent in application of the concepts learned in their various tribal positions. Mr. Fenske's goal is to fully train each interested individual. His expectation is a personal investment from both the individual and the tribe. He has no specific time frame in mind. At this point he is interested in learning more about what the Initiative guidelines are. He also has a question about whether this is a jobs program or a profit for the tribe program. He will put together a one page summary of what his concept entails and will fax it to my attention within the week.
- B. Business: Innovative Development Solutions
Contact: Ray Kavarsky 860/829-1600
Address: Berlin, Connecticut
Summary: Innovative Development Solutions (IDS) is a housing technology transfer consulting firm specializing in manufacturing modular homes. IDS currently has home building projects in Philadelphia PA, Camden NJ, Ghana Africa, and Hartford CT. IDS also has a proposal in Egypt. The company works with the community to train community members while building new homes. IDS operates for profit. Mr. Kavarsky would like more information on who to contact as well as what the New Market Initiative entails.
- C. Business: Larry Newby
Contact: Larry Newby 605/532-5368
Address: Clark, South Dakota
Summary: Mr. Newby is interested in establishing a shoe factory on the Pine Ridge reservation. He currently markets shoes to Nordstrom, J.C. Penney, and Wards as well as other department stores. He orders shoes made in China at present, but is

interested in creating a manufacturing business in the US. He is the vice president of the shoe company. He would like to know who is in control of the funding for the Initiative and what type of funding is available. He is in the process of meeting with the SBA to determine what is necessary to establish a manufacturing business. I have said that we will send him more information on how the process will work. He is interested in establishing this factory as soon as possible. His primary goal is to create jobs on the reservation. He would also like the name of a contact at Pine Ridge in order to facilitate the process.



Lisa Green
09/07/99 06:37:38 PM

Record Type: Record

To: Melissa G. Green/OPD/EOP@EOP
cc: Jonathan A. Kaplan/OPD/EOP@EOP
Subject: Follow-up from today's new markets meeting -- Also infor for the 8:00 in bold

In today's New Markets interagency meeting we discussed several items that Gene will probably want to know about:

1) We have tentatively scheduled a brainstorming session on Thursday, September 16 to help generate ideas for the November trip. [Melissa if Gene wants to participate/attend we will obviously move this date to accomodate his schedule].

2) We have set a date of Monday September 20 for written submission of ideas (themes and locations) for the November trip.

3) OPL will be working on setting up a series of separate briefings on New Markets for each of the following industry/groups.

- Industry/Trade Associations
- Think Tanks (i.e. Urban Institute, Brookings)
- Civil Rights Organizations (i.e. La Raza, NAACP, Urban League, etc.)
- Washington Reps for States and Cities --- this would obviously be coordinated in conjunction with IGA.

Jay Dunn has been great about focussing on New Markets and what we can do to create support for the Initiative. **Gene will probably want to participate in these briefings, so we need to make sure that MaryBeth is aware that he expects to be involved and that the meetings should be scheduled to accomodate his calendar. This may be something that Gene will want to raise at the 8:00 or individually with MaryBeth.**

4) The CDFI BusinessLINC Seminar/Conference for Financial Institutions is on schedule for next Wednesday afternoon, September 15th. The meeting will involve many of the participants attending the American Banker's Association conference on Community and Economic Development taking place next Monday through Wednesday morning.

Withdrawal/Redaction Marker

Clinton Library

DOCUMENT NO. AND TYPE	SUBJECT/TITLE	DATE	RESTRICTION
002. memo	Draft Memorandum to the President; RE: personal info [partial] (1 page)	08/11/1999	P6/b(6)

COLLECTION:

Clinton Presidential Records
Policy Development
Lisa Green
OA/Box Number: 20586

FOLDER TITLE:

[New Markets Agenda & Meetings] [loose]

2012-0043-S
ms236

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]
- P3 Release would violate a Federal statute [(a)(3) of the PRA]
- P4 Release would disclose trade secrets or confidential commercial or financial information [(a)(4) of the PRA]
- P5 Release would disclose confidential advice between the President and his advisors, or between such advisors [(a)(5) of the PRA]
- 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]
- b(2) Release would disclose internal personnel rules and practices of an agency [(b)(2) of the FOIA]
- b(3) Release would violate a Federal statute [(b)(3) of the FOIA]
- b(4) Release would disclose trade secrets or confidential or financial information [(b)(4) of the FOIA]
- b(6) Release would constitute a clearly unwarranted invasion of personal privacy [(b)(6) of the FOIA]
- b(7) Release would disclose information compiled for law enforcement purposes [(b)(7) of the FOIA]
- 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]

[002]

August 11, 1999

P6/(b)(6)

DRAFT MEMORANDUM TO THE PRESIDENT

FROM: GENE SPERLING

SUBJECT: STATUS REPORT ON THE NEW MARKETS INITIATIVE

P6/(b)(6)

The purpose of this memorandum is to update you on activities that have taken place and that are being planned related to your New Markets Initiative.

Legislation

- Bills Introduced for APICs and New Markets Tax Credit. As you know legislation based upon your New Markets Initiative was introduced in both the House and the Senate last week. Rep. Rangel introduced H.R. 2713 referred to the Ways and Means Committee and Sen. Rockefeller introduced S. 1526 referred to the Finance Committee --- both bills are based upon the New Markets Tax Credit outlined in your FY 2000 budget. Rep. LaFalce introduced H.R. 2764 referred to the Committee on Banking and Financial Services and Sen. Sarbanes introduced a bill referred to the Committee on Banking, Housing and Urban Affairs --- both of these bills are based on the America's Private Investment Companies proposal in your FY 2000 budget.

LL
 Describe
 the six
 components
 → show how
 they are
 in the
 law next
 time as
 way in.

The lead sponsors have been very supportive and active in seeking support for the New Markets Initiative. The bills submitted are nearly identical to your original proposal. Senator Daschle also signed on as an initial co-sponsor for both bills. There were a total of 8 initial co-sponsors on the two Senate bills and 31 initial co-sponsors on the two House bills. All of the initial co-sponsors are Democrats, many of whom participated in the New Markets Tour, including Rep. Waters, Rep. Pastor and Rep. Kanjorski. We had anticipated support from Rep. Leach and Rep. Baker on the APICs bill, however they withdrew their support just prior to its introduction; we believe their reluctance was based solely on pressure from the Republican leadership.

of the Senate

*Watts
 Phil*

- Offer Letter to Hastert. We have drafted an offer letter to Hastert regarding the American Community Renewal Act, introduced earlier this year by Rep. Talent and Rep. Watts, which the Republicans have presented as their counterproposal to the New Markets Initiative.
- Additional Bill to Be Introduced on New Market Venture Capital Firms. We expect a third bill to be introduced immediately following the recess on the New Markets Venture Capital Firms component of your initiative. Likely sponsors are Rep. Velazquez and Sen. Kerry, both of whom are the ranking members of their respective Small Business Committees.
- Briefings. Legislative Affairs has conducted briefings with NEC and agency staff for approximately 20 members of Congress, almost all of whom have expressed interest in the legislation and many of whom signed on as initial co-sponsors of the two bills introduced last week. We are continuing ongoing efforts to brief key committee members.

Ongoing Efforts

- Task Force on Market Research and Data. We have established an interagency working group that is developing possible roles for the government in providing and publishing data that would assist private sector companies in their evaluation of investment opportunities in new markets. This group includes economists and representatives from CEA, BLS, the Census [need to check if this is the correct name for this agency], Labor, Commerce, HUD, Transportation. We are exploring the possibility of an Executive Order, which would formalize this effort. The group has also proposed a conference to bring together practitioners and academia to discuss the "information gap" for new markets.
- New Ideas. We continue to meet regularly with individuals inside and outside of the White House to explore ideas that are related to the New Markets Initiative. Some of these ideas may ultimately lead to deliverables for the second New Markets trip or independent New Markets events by Cabinet members or the Vice President. We have met with individuals from the Council on Environmental Quality to discuss how New Markets may fit with the Vice President's Livability Agenda. We are exploring efforts by Commerce to encourage a pilot program in California that would help create a market to securitize community development loans. We are also working to develop SBA's proposal to encourage the efforts of universities that provide student consulting for small businesses in new markets. Lastly, we are seeking ways to connect the New Markets Initiative to other efforts supported by the administration such as the Welfare-to-Work Partnerships.
- Working with Local Municipalities and Governments. We are aware of several activities by cities and states that are supportive of and complementary to the New Markets Initiative. These include programs proposed by the States of California and North Carolina that would create tax incentives for private sector investment in low and moderate income communities. North Carolina has also created a task force to attack the problems of Rural Economic Development that is being led by Erskine Bowles. We would like to bring attention to these types of programs, by holding briefings at the White House and participating in local events, to offer them as models that could perhaps be replicated in other areas. We are also continuing to work with the Appalachian Regional Commission to identify ways to highlight and build support for New Markets in their 13 states. Lastly, we will continue to work with the National Governor's Association, the U.S. Conference of Mayors and the National Association of Counties to build support for our efforts.

August 11, 1999

plm

MEMORANDUM TO GENE SPERLING

FROM: LISA GREEN

SUBJECT: STATUS REPORT ON THE NEW MARKETS INITIATIVE

The purpose of this memorandum is to update you on activities that have taken place and that are being planned related to the New Markets Initiative.

Legislation

- **Background on Bills Introduced for APICs and New Markets Tax Credit.** As you know legislation based upon your New Markets Initiative was introduced in both the House and the Senate on August 5. Rep. Rangel and Sen. Rockefeller introduced bills based upon the New Markets Tax Credit. Rep. LaFalce and Sen. Sarbanes introduced bills based on the America's Private Investment Companies proposal in your FY 2000 budget.

The lead sponsors have been very supportive and active in seeking support for the New Markets Initiative. The bills submitted are nearly identical to the original proposal, with only the Rockefeller bill having some slight differences from the Administration's proposal. Senator Daschle also signed on as an initial co-sponsor for both bills. There were a total of 8 initial co-sponsors on the two Senate bills and 31 initial co-sponsors on the two House bills. All of the initial co-sponsors are Democrats, many of whom participated, in the New Markets Tour, including Rep. Water, Rep. Pastor and Rep. Kanjorski. As you know, we had anticipated support from Rep. Leach and Rep. Baker on the APICs bill, however they withdrew their support just prior to its introduction; we believe their reluctance was based solely on direct pressure from the Republican leadership.

Important Notes: We anticipate that a summary of the legislation will be sent in the DPC weekly in the coming weeks. In addition, we expect additional sponsors to sign on following the recess as a result of dear colleagues sent by lead sponsors and possibly Daschle. I have received a request to meet informally with a staff member from Rep. Clyburn's office about the New Markets Initiative. Most members of the CBC (including Rep. Clyburn) and members of the CHC were conspicuously absent in the initial sponsorship of these bills. Your guidance and involvement in working with these members would be very helpful.

- **Planned Introduction of New Market Venture Capital Firms.** Following last week's meeting with Michael Day from Rep. Velazquez' office and Patty Forbes from Sen. Kerry's office we expect the third bill to be introduced immediately following the recess for the New Markets Venture Capital Firms component of the initiative. Per my e-mail summarizing the meeting (attached) it would be helpful for you to place a call to Rep. Velazquez upon your return from vacation.
- **Offer Letter to Hastert.** I have re-drafted the offer letter to Hastert regarding the American Community Renewal Act, introduced earlier this year by Rep. Talent and Rep. Watts, which the Republicans have presented as their counterproposal to the New Markets Initiative. An

update from you on the status of negotiations on this matter and likely next steps would be helpful.

- **Briefings.** I have participated in numerous congressional briefings with Legislative Affairs and agency staff over the last few months. Your input and thoughts on follow-up strategy (perhaps involving yourself and Larry) particularly for key committee members would be helpful. One idea that I would recommend is a large briefing for key members and/or caucuses with some of the actual practitioners and investors that would benefit from the New Markets Initiative.

Follow-up from the New Markets Trip

- **Correspondence.** The correspondence office has drafted dozens of letters to individuals who participated in the trip or who wrote the White House following the trip. I have reviewed the language for almost all of these letters. Similarly, I have gone through your draft letters and made notes, which should help facilitate your sign off and the mailing of these letters upon your return. Lastly, we are doing a mass sorting of photographs from the trip, some of which I will pull if appropriate to include with your letters.
- **White House Events.** As you know we held our first major follow-up event earlier this month to announce the national BusinessLINC effort. The office of Public Liaison also coordinated a briefing this month for the Washington Representatives of major corporations about the New Markets legislation. The participants in this meeting have indicated an interest in organizing a private industry coalition to support the New Markets Initiative. Other events are being considered as described in detail below.
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Barry White
08/19/99 05:46:50 PM

Record Type: Record

To: Lisa Green/OPD/EOP@EOP
cc: Andrea Kane/OPD/EOP@EOP, Kenneth L. Schwartz/OMB/EOP@EOP, Alan B. Rhinesmith/OMB/EOP@EOP
Subject: Economic development and jobs

This note follows up on my voice mail.

Andrea Kane of DPC tells me you are heading the NEC effort on new markets and economic development. Andrea and I, from our respective bases, share an interest in linking the Administration's initiatives to create jobs, with the Administration's initiatives that prepare people and aim people for those jobs (Welfare to Work, TANF, the Workforce Investment Act, and the like). Apparently you and she have also talked about this.

Here in OMB, the Division Chiefs for the job creation activities are Ken Schwartz and Alan Rhinesmith, under PAD Michael Deich. I handle the people end, under PAD Barbara Chow. We have agreed here on the value of closer interaction in discussions of policies on both sides of the equation.

It may be useful to have some OMB representation at your weekly sessions on the job creation side, to see where we can find common cause with the people side. Barbara and Michael are both on vacation now. Ken, Alan, and I are around (though I'm off 8/20). If you'd like to talk more about this, let us know.

Thanks.



Betsy.Kim@sba.gov
09/08/99 04:41:18 PM

Betsy Kim

Record Type: Record

To: Jackson T. Dunn/WHO/EOP, xavier_briggs@hud.gov, heyman-stephen@dol.gov
cc: See the distribution list at the bottom of this message
Subject: SBA Partners

Jay, Steve & Xav -- per our discussion yesterday, following is a list of our African American partners. Our Hispanic & women partners are attached as two separate Excel docs. please let me know if you have problems opening the excel docs (you have to print on legal size paper) and I will fax them to you.

SBA African American Partners:

- > 1) Mr. Tony Robinson, President
 - > MBELDEF (Minority Business Enterprise
Legal Defense & Education Fund)
 - > 900 2nd St., N.E. Suite # 8
 - > Washington, DC 20002
 - 202-289-1700
 - 202-289-1701 f

- > 2) Mr. Kweisi Mfume, President
 - > NAACP
 - > 4805 Mt. Hope Drive
 - > Baltimore, MD 21215
 - 410-358-8900
 - 410-486-9255 f

- > 3) Mr. Harry Alford, President
 - > National Black Chamber of Commerce
 - > 1350 Connecticut Ave., NW Suite 825
 - > Washington, DC 20036
 - 202-466-6888
 - 202-466-4918 f

- > 4) Mr. Hugh Price, President
 - > National Urban League
 - > 120 Wall Street, 8th Floor
 - > New York, NY 10005
 - 212-558-5300
 - 212-344-5332 f

- > 5) Dr. Jane Smith, President
 - > National Council of Negro Women

- > 633 Pennsylvania Ave., NW Second Floor
- > Washington, DC
- > 202-737-0120
- > 202-737-0476 f

- > 6) Rev. Joseph Washington, Chairman,
- > Organization For A New Equality (ONE)
- > Brooks United Methodist Church
- > 143-22 109th Avenue
- > Jamaica, NY 11435
- > 617-424-6631
- > 617-424-7693 f

- > 7) Amb. Wilbur J. LeMelle, President
- > Phelps Stokes Fund
- > 74 Trinity Place Suite 1303
- > New York, NY 10006
- > 212-619-8100
- > 212-876-6278 f

- > 8) George Willie, Chairman of Division of Firms
- > National Association of Black Accountants, Inc.
- > 1401 New York Ave., NW #540
- > Washington, DC 20005
- > 202-393-8683

- > 9) Harriett Michel, President
- > National Minority Supplier Development Council
- > 1040 Avenue of the Americas 2nd Floor
- > New York, NY 10018
- > 212-944-2430
- > 212-719-9611 f

- > <<Hispanic Partnership List.xls>> <<Women Partnership List.xls>>
- >



- att1.htm



- Hispanic Partnership List.xls



- Women Partnership List.xls

Message Copied To: _____

August 11, 1999

*Write for Charles
and [unclear] day
EPA
Connect this
pull in bank [unclear]
that in support
of the J.P.
on the [unclear]
1/10/00
back
my life
1/1/00*

MEMORANDUM TO GENE SPERLING

FROM: LISA GREEN

SUBJECT: STATUS REPORT ON THE NEW MARKETS INITIATIVE

The purpose of this memorandum is to update you on activities that have taken place and that are being planned related to the New Markets Initiative.

Legislation

- **Background on Bills Introduced for APICs and New Markets Tax Credit.** As you know legislation based upon your New Markets Initiative was introduced in both the House and the Senate on August 5. Rep. Rangel and Sen. Rockefeller introduced bills based upon the New Markets Tax Credit. Rep. LaFalce and Sen. Sarbanes introduced bills based on the America's Private Investment Companies proposal in your FY 2000 budget.

The lead sponsors have been very supportive and active in seeking support for the New Markets Initiative. The bills submitted are nearly identical to the original proposal, with only the Rockefeller bill having some slight differences from the Administration's proposal. Senator Daschle also signed on as an initial co-sponsor for both bills. There were a total of 8 initial co-sponsors on the two Senate bills and 31 initial co-sponsors on the two House bills. All of the initial co-sponsors are Democrats, many of whom participated, in the New Markets Tour, including Rep. Water, Rep. Pastor and Rep. Kanjorski. As you know, we had anticipated support from Rep. Leach and Rep. Baker on the APICs bill, however they withdrew their support just prior to its introduction; we believe their reluctance was based solely on direct pressure from the Republican leadership.

Important Notes: We anticipate that a summary of the legislation will be sent in the DPC weekly in the coming weeks. In addition, we expect additional sponsors to sign on following the recess as a result of dear colleagues sent by lead sponsors and possibly Daschle. I have received a request to meet informally with a staff member from Rep. Clyburn's office about the New Markets Initiative. Most members of the CBC (including Rep. Clyburn) and members of the CHC were conspicuously absent in the initial sponsorship of these bills. Your guidance and involvement in working with these members would be very helpful.

- **Planned Introduction of New Market Venture Capital Firms.** Following last week's meeting with Michael Day from Rep. Velazquez' office and Patty Forbes from Sen. Kerry's office we expect the third bill to be introduced immediately following the recess for the New Markets Venture Capital Firms component of the initiative. Per my e-mail summarizing the meeting (attached) it would be helpful for you to place a call to Rep. Velazquez upon your return from vacation.
- **Offer Letter to Hastert.** I have re-drafted the offer letter to Hastert regarding the American Community Renewal Act, introduced earlier this year by Rep. Talent and Rep. Watts, which the Republicans have presented as their counterproposal to the New Markets Initiative. An

*John [unclear] to
the [unclear]
This [unclear]
Elizabeth
with [unclear]
pro [unclear]
Goals and
15
peachkes
Sun [unclear]
spans*

update from you on the status of negotiations on this matter and likely next steps would be helpful.

- **Briefings.** I have participated in numerous congressional briefings with Legislative Affairs and agency staff over the last few months. Your input and thoughts on follow-up strategy (perhaps involving yourself and Larry) particularly for key committee members would be helpful. One idea that I would recommend is a large briefing for key members and/or caucuses with some of the actual practitioners and investors that would benefit from the New Markets Initiative.

Follow-up from the New Markets Trip

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AGENDA

NEW MARKETS MEETING

OCTOBER 5, 1999
4PM - ROOSEVELT ROOM

[Handwritten scribbles]

Andy Ing - Call List

*calls for
Sun - 5th*

1. Discussion of Vetting: Minnesota, Englewood and Gary

2. Update: North Carolina, ~~Chicago~~², and Arkansas

Englewood

3. Rural/Farming Sites

Arkansas

Portland

4. Small and Medium Cities

Gary

5. Large Cities

Boston Harbor

Newark

6. Communications Plan

Fresno

7. Strategies for Congressional Participation

*7 ~~other~~ locations
need to check*

5

~~Comments~~

⇒ North Carolina²

*Hartford² - need to
visit*

Day One - Chicago

*Day Two - Arkansas, North Carolina, Fla., Ala.;
Ex. 100*

Day Three - Newark, (Hartford)

① ~~Strategic Plan - attachment - Jan~~

② Attachment - FC / - Nelson

1/15/11
Jury
Jury
Jury
Jury
Bill
Monsieur
SAP 5/1/11
David with
Tobin
Bauer

③ New Site Names - revised - Jan

④ Meeting - IGA
Political Part
with Finance

Minnesota - Legislative Affairs, Product, Public, enactment
Ken Tammen - Guy, Indiana
Jan
1/15/11

⑤ Notes Memo ✓

⑪ Charitable Choice

⑤a Agency phone calls

⑩ Legislative Affairs *

⑥ Study Notes Meetings

⑦ Briefing Papers 8 Thursday
4 Friday

⑧ Briefing - One Jan
Jan

⑨ next steps

NEW MARKETS TRIP - InterAgency Working Group Contact Information

<u>Agency</u>	<u>Name</u>	<u>Number</u>	<u>Fax</u>	
SBA	<i>Belong Kim</i> Saunders Millers	205-3646		<i>Lisa - FU r/s</i>
	Millicent Hodge	401-1353		
	Kris Swedin	205-6605		
	Michele Kreiss	888-7947x445	205-6802	
Treasury	Michael Barr	622-0016	622-5672	<i>Natas ha - 2nd trip</i>
	Don Graves	622-4042		
	Cliff Kellogg	622-5732		
CDFI	Maurice Jones	622-8444		<i>Lisa Jones</i>
HUD	Jacque Lawing	708-0270	708-4087	<i>Lisa Jones</i>
	Karen Hinton			
	Scott Sherman			
USDA	Clyde Williams	720-3631	720-5437	<i>Natas ha - 2nd trip, has</i>
	Justin Paschal			
Labor	Steve Heyman	693-4628	693-4642	✓
Commerce	Jon Orszag <i>Dawn Crowe</i>	492-3520	482-4636	<i>Natas ha</i>
Transportation	Al Eisenberg	366-4871	366-7127	<i>Lisa - 1st trip and 2nd trip</i>
	Marriann Smith	366-0523		
<u>White House</u>				
NEC	Lisa Green	456-2803	456-2223	
	Patrick Dorton	456-5364		
	Carl Haacke	456-5367		
	Jon Kaplan			
OPL	Jay Dunn	456-7702		
Cabinet Affairs	Ann McGuire	456-2572		
COS	Lynn Cutler	456-5019		
Speechwriting	Josh Gottheimer	456-2554	456-2505	
	Lowell Weiss	456-2734		
Legislative Affairs	Janelle Erickson	456-6620		
Political Affairs	Andrew Mayock	456-1831		
CEB	Alvin Brown	456-9881		
Communications	Stephanie Cutter	456-2683		
	Patrick Dorton	456-5364		

Bill Gucht 202-8042

TO: MaryBeth Cahill, Minyon Moore
Gene Sperling, Stephanie Streett, Lynn Cutler, Sara Latham

Cc: Jackson Dunn, Lisa Green, Laura Graham, Aviva Steinberg, Julie Eddy,
Andrew Mayock

FROM: Maria Echaveste

RE: Notes and assignments from 9/29 New Markets meeting

We agreed that we would do Hartford on October 18 and that we try to work in a program that includes Groton, New London and other small Connecticut cities.

We also agreed that the November trip would start with Newark.

Our next New Markets meeting is scheduled for Tuesday, October 5. Below you will find the locations to be discussed at that meeting.

Office Due date: 10/5

NEC Paper describing accomplishments from the first New Markets Trip ✓

NEC Hartford deliverables ✗
OPL

NEC Discussion and vetting of Englewood; Minnesota; Gary, Indiana; North Carolina; Arkansas ✓
Political
Legislative
Scheduling

NEC Ask Agriculture Department for additional rural/farming sites ✓

OPL Check on potential deliverables for Portland ✓

NEC Find an urban Native American site - *Nehia*
Lynn

NEC Continue to look for more information regarding Chicago, Benton Harbor,
Detroit and Duluth.

End of Oct. — tentatively the
26th

Daley visits Mississippi
Delta.

October

Daley announces partnership
w/ Nat'l Academy Foundation

Sept./Oct.

Potentially F-DA grants
in these six areas.

Since I like being quit, here you go...

OFFICE OF THE SECRETARY
Office of Policy and Strategic Planning

FOR MASTER SCHEDULE

1ST Week in August:

- Daley visits Community Tech. Center in DC or Balt. w/ CEOs & community leaders
- Announces he is sending letter to 25 CEOs for mtg. on digital divide.

End of Sept./Beg. of Oct.

- Daley visits two sites to announce TIAP grants — grants to help underserved areas w/ ~~the~~ tech infrastructure.

End of Sept./Beg. of Oct.

- CEO Mtg. on Digital Divide.