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 4598426958749557001	Event	<b>White House Urban Entrepreneur Forum -- Oakland, CA</b>		
	Date+Time	Friday, August 12, 2011 from 7:00 AM - 1:00 PM (PT)		Name
	Type	<b>General admission</b>	Payment Status	<b>Free Order</b>
	Location	3500 Mountain Blvd. Oakland, 94619		
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FRIDAY  
AUGUST 12, 2011



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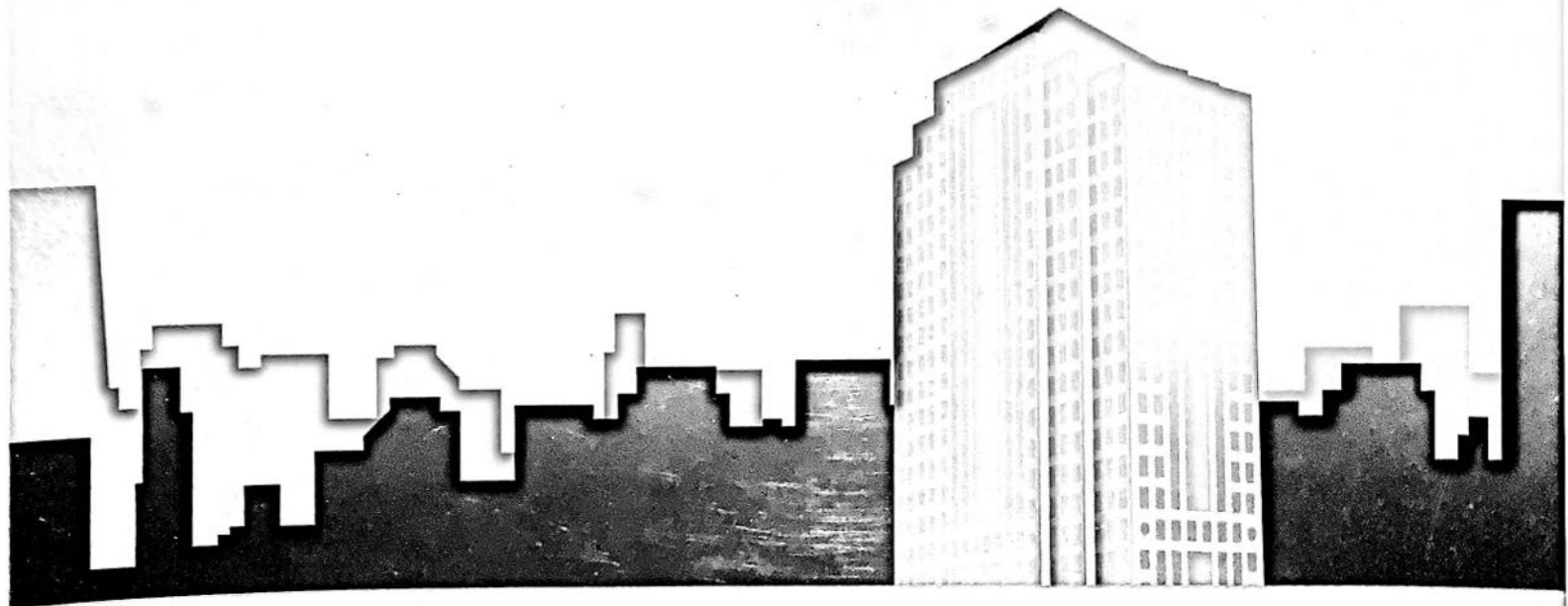
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# URBAN ENTREPRENEURSHIP FORUM

FRIDAY  
AUGUST 12, 2011

HOLY NAMES UNIVERSITY  
3500 Mountain Blvd. • Oakland, CA



President Barack Obama has laid out a vision to win the future by out-innovating, out-educating and out-building the rest of the world. Recognizing the critical role that entrepreneurship plays in creating jobs and economic opportunity for people in the private sector, the Administration is committed to creating public-private partnerships to support current entrepreneurs and spark a new generation of urban entrepreneurs. The work of these urban entrepreneurs will strengthen the core of our economy, reset urban communities as future job factories, and attractive emerging markets for investment. The result will be a new era of sustainable economic opportunities for not just urban America but the entire country, and a new culture of prosperity shared by all.

The purpose of this event is to discuss best practices with urban entrepreneurs and hear their feedback on how the Administration and the private sector can best support their growth and success in the global economy.



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## PROGRAM

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7:00am to 8:00am

**Continental Breakfast/Registration**

8:00am

**Welcome From The White House**

8:15am

**Greetings from Vice Mayor Desley Brooks**

8:25am

**Plenary Session:**

- **Ari Matusiak** - Executive Director, White House Business Council
- **Bill Hynes** - President, Holy Names University
- **Joe Kennedy** - CEO, Pandora

9:45am

**Questions & Answers**

10:00am

**Break**

10:15am - 11:15am

**Roundtable Discussion: *Public, Private, Not for Profit Partnerships***

- **Marisa Lee** (Moderator) - Small Business Administration
- **Darien Louie** - Director, Public-Private Partnerships, East Bay Community Foundation
- **Kristin Groos-Richmond** - CEO, Local Foods
- **Orson Aguilar** - Executive Director, Learning Institute

11:15am - 11:30 am

**Break**

11:30am - 12:30pm

**Roundtable Discussion: *Access to Capital***

- **Tricia Kerney-Willis** (Moderator) - U.S. Department of Treasury
- **Felicia Pierson** - Managing Director, OBDC Small Business Finance
- **Robert Davenport** - Managing Partner, Brightpath Capital Partners
- **Santiago Cuenca-Romero** - President, Premier Organics
- **Kat Taylor** - Founder, One PacificCoast Bank

12:35 pm

**Wrap-Up by Ari Matusiak and Vice Mayor Desley Brooks**

12:45 - 1:30 pm

**Networking Lunch *sponsored by Wells Fargo***

Co-hosted by:  
**The White House, The Office of Vice Mayor Desley Brooks, Holy Names University,  
Oakland Citizens Committee for Urban Renewal (OCCUR), Inner City Advisors,  
National Association of Minority Contractors (NAMC), 100 Urban Entrepreneurs,  
Operation HOPE, & multiple federal agencies**

**Lunch generously sponsored by Wells Fargo**



**occUR**

**InnerCityAdvisors**



**White House Urban Entrepreneur Forum**  
**August 12, 2011**

**Local Organizing Team**

**Desley Brooks**  
**Vice Mayor, and**  
**Council Member, District 6**

Council Member Brooks is committed to improving the quality of life for the residents in her District and the city of Oakland. To that end, she has dedicated her energies to improving public safety, increasing economic development, improving the physical environment of District 6, and advocating on behalf of children and youth. She has worked to revitalize the District's neighborhoods and commercial corridors. She has championed the interests of small and local businesses by authoring the City's Prompt Payment Ordinance; by securing funding for and implementation of the City's one stop contracting software; and advocating for the establishment of the City's Debarment program.

Council Member Brooks serves as the Chairperson of the City of Oakland's Life Enrichment Committee; and is a member of the Council's Finance and Budget Committee, and the Rules Committee. She is the Co-Chairperson of the Education Partnership Committee, and is a member of the Coliseum Joint Powers Authority and the Alameda County Lead District Joint Powers Authority. She is the California State Director of the National Black Caucus of Local Elected Officials; Treasurer of the California League of Cities Black Caucus; and a California State Delegate to the State Democratic party. She is also a member of the Association of Bay Area Governments (ABAG), and the Legislation and Governmental Affairs Committee of ABAG. She is the City of Oakland Delegate to the National League of Cities and the Alternate Delegate for the California League of Cities. She formerly served as: an Advisory Board Member for the College of Natural Resources at the University of California, Berkeley; a Board Member of the Oakland Cross City Campaign, and a Member of the National Board of Directors of the Cross City Campaign.

Council Member Brooks is a native of New Orleans, Louisiana and a transplant to Oakland from Seattle, Washington. Council Member Brooks moved to Oakland in 1989. She has a B.A. in Political Science from the University of Washington and a Juris Doctorate from Seattle University. She was formerly the Chief of Staff to Alameda County Supervisor Keith Carson; a Trial Attorney with the U.S. Department of Justice Immigration & Naturalization Service; Assistant District Council with the Department of Housing & Urban Development; Staff Attorney with the Washington State Legislature; and a Public Defender with Northwest Defenders

**David E. Glover**  
**Executive Director**  
**OCCUR**

David Glover is the Executive Director of OCCUR, a 55-year old public interest and direct service organization that develops public policy and implements programs that positively impact low-moderate income neighborhoods and communities. Under David's leadership, OCCUR has become a leader of critical efforts to build and revitalize neighborhoods and communities throughout the Greater Oakland/Bay Area region. In recent years, OCCUR has developed public policy on Community Benefits and Equity Participation, produced critical land use and neighborhood indicator data such as the nationally acclaimed Neighborhood Profiles, founded and operates a best practice technology access/education center, the Eastmont Technology Center (ETC)/Intel Clubhouse, implemented highly effective consumer education campaigns and assisted thousands of non-profit organizations in capacity-building and organizational development. Mr. Glover has produced several public affairs programs for radio and television. He also works with numerous youth mentoring, sports and leadership programs.

**Jose Corona**  
**Chief Executive Officer**  
**Inner City Advisors**

As Chief Executive Officer, Jose leads the ICA team by providing strategic leadership, management and direction to Inner City Advisors. Since joining the organization in 2004, Jose has led the organization in helping inner city entrepreneurs achieve success by assembling an unparalleled network of the Bay Area's foremost business leaders and is often sought out for his ability to understand inner city business trends. Over a seven year period, Jose has overseen \$8,253,600 of total pro bono investments into the ICA mission. In 2010, these combined investments supported the creation and retention of 1,945 jobs—73% of which are held by inner city residents. This represents over \$77 million of wealth creation for San Francisco Bay Area inner city communities.

Having worked in business and community development for over a decade, Jose is passionate about entrepreneurship. Raised by a family of successful farming entrepreneurs, Jose understands by way of practical experience how growing businesses have the power to transform communities. Jose has championed inner city job creation efforts with a comprehensive series of community and economic development programs and partnerships. The centerpiece of Corona's efforts has been the creation of strong and vibrant public-private partnerships with an emphasis on a shared commitment ensure the presence of sustainable, responsible inner-city companies that provide quality jobs, reinvest in the community, and contribute to the local economy. In 2009, Jose's commitment to and track record in the development of businesses and community garnered him the Young Executive of the Year Award by the Oakland Metropolitan Chamber of Commerce.

Prior to ICA, Jose served as development director at Mission Economic Development Agency (MEDA), a San Francisco-based non-profit organization that provides business technical assistance and neighborhood planning services to mostly Latino-owned small businesses. Before working in the non-profit sector, Jose also worked in Corporate Retail Operations and Human Resources at Macy's, Inc.

Jose sits on various boards. He is Mayoral appointee to the Oakland Workforce Investment Board and serves on the Board of Directors of the YMCA of The East Bay and the Oakland Schools Foundation. Jose also serves on the Advisory Board of One PacificCoast Bank. He holds a Bachelor of Science degree from UC Davis, and Entrepreneur Management Development Certification from the UCLA Anderson School of Management.

### ***Plenary Session***

***Ari Matusiak***

***Executive Director***

***White House Business Council***

Ari Matusiak is the Executive Director of the White House Business Council, a body comprised of over 225 senior Administration officials from the White House and over a dozen Cabinet and sub-Cabinet agencies. Ari oversees the Administration's engagement with the business community outside of Washington, DC. He is part of the team at the White House working with the business community in order to support their creation of jobs, growth and success.

Prior to joining the Administration, Ari was the co-founder and founding chairman of Young Invincibles, a national organization dedicated to advancing the economic opportunity and influence of young adults. "YI" played a key role in garnering the support of 18 to 34 year olds for comprehensive health care reform and was the lead advocate in the passage of the dependent coverage provision and comprehensive reforms to student health plans.

Ari has extensive nonprofit, philanthropic and community and economic development experience. He was Vice President for Strategy and Community Impact at The Rhode Island Foundation, one of the oldest and largest community foundations in the country. In that capacity, he was responsible for overseeing the foundation's strategic direction, special initiatives and engagement in public policy. He was also Director of HousingWorks RI, a statewide coalition and campaign dedicated to increasing the supply of affordable housing in the state. In 2006, Ari led a successful statewide ballot question campaign that secured \$50 million in state bonds for homes working Rhode Islanders could afford. Over four years, that bond has leveraged nearly \$800 million in additional capital, creating 1,250 long-term affordable homes and 6,100 good paying jobs in the state.

Ari is a Public Interest Law Scholar and cum laude graduate of Georgetown University



Law Center, and graduated magna cum laude and Phi Beta Kappa from Brown University.

**Joe Kennedy**  
**Chief Executive Officer & President**  
**Pandora Internet Radio**

Joe Kennedy joined Pandora in 2004 following a five-year stint at E-LOAN, where he was President and Chief Operating Officer. From 1995 to 1999, he was the Vice President of Sales, Service and Marketing for Saturn Corporation, which he grew to over \$4 billion in revenue and established as the top brand for customer satisfaction in the auto industry. Joe joined the initial start-up team at Saturn, four months after its founding, as a marketing manager and held positions of increasing marketing responsibility over the course of his 11-year tenure there.

Joe holds an M.B.A. from Harvard Business School and a B.S. degree in Electrical Engineering and Computer Science from Princeton University, where he dabbled in music theory and learned to compose his own Gregorian chants. He is Pandora's resident pop music junkie. Joe has also been playing the piano for more than 30 years, most of which has been spent attempting to master Gershwin's "Rhapsody in Blue."

**Dr. William J. Hynes**  
**President**  
**Holy Names University**

Dr. William J. Hynes, the 17<sup>th</sup> President of Holy Names University, came to this position a year ago. He is a distinguished teacher, scholar, and educational leader. He holds the Ph.D. and M.A. from the University of Chicago in the History of Christian Thought, another M.A. in Catholic Theology from Marquette University, his BA from Conception College, and Certificates from both Harvard University and the University of Geneva.

Previously, for eight years Dr. Hynes served as President of St. Norbert College in Green Bay, Wisconsin, Vice-President of Academic Affairs at St. Mary's College of California in Moraga, and Dean of the College at Regis University in Denver, Colorado. He has held faculty appointments at all these institutions and taught undergraduates and graduate students for more than 20 years. Hynes is the author of three books. He is concluding work on a fourth book on the Principles of Entrepreneurship based upon interviews with 26 entrepreneurs, many from the Bay Area, including Peter Bedford and George Zimmer.

Having lived in the East Bay for a total of eleven years, Bill knows Oakland well. He is a member of the Oakland Dialog. His wife, Margie Shurgot was Vice President of the California College of the Arts. His sons attended elementary school in Oakland, sang in the Piedmont Choir, and learned to skate at the Oakland Ice Center.

## **Round Table Discussion – Public, Private, Not For Profit Partnerships**

**Elizabeth Echols**  
**Regional Administrator**  
**Small Business Administration (SBA)**

Elizabeth Echols was sworn in August 2, 2010, as the Regional Administrator of the U.S. Small Business Administration (SBA). Appointed by President Barack Obama, Ms. Echols oversees SBA's programs, services, and 120 employees throughout Region IX, which encompasses California, Nevada, Arizona, Hawaii, Guam and U.S territories in the Pacific.

SBA plays a leading role helping small business owners and entrepreneurs secure financing, technical assistance, training and federal contracts. As part of SBA's economic recovery efforts, Region IX has backed more than 14,500 loans worth over \$8 billion. Ms. Echols has distinguished herself as a strong advocate for innovation, sustainability, economic development and job creation. Most recently, Ms. Echols served as Director of the Northern California chapter of the U.S. Green Building Council, where she focused on developing public policy and forging alliances to support green jobs. Previously, she served as a member of the Obama-Biden Transition Team co-leading the agency review process for the National Telecommunications and Information Administration. She also served as Director of Policy at Google, where she managed the development and implementation of global e-commerce and content policies for over 40 Google consumer and business products.

Ms. Echols is passionate about providing opportunities to the youth and underserved markets. She previously served as CEO of OpNet Community Ventures, a nationally recognized non-profit that prepared low-income young adults for good jobs in the technology industry and helped them start their own multi-media businesses. During the Clinton Administration, Ms. Echols played a leading role at the White House and the Department of Commerce. She served as the White House's first Executive Director of Electronic Commerce Working Group under Vice President Al Gore where she was at the forefront of developing and implementing the administration's strategy on global Internet and e-commerce issues. She also served as Senior Advisor to Commerce Secretary Daley advising him on domestic and international Internet and telecommunications issues.

Ms. Echols has been recognized as a "Mover and Shaker" by Business Week, and received the Gold Medal Award, the highest honor presented by the U.S. Secretary of Commerce. She also has been profiled in numerous publications, including *The New York Times*, *Wired Magazine*, *The National Journal*, and *Working Women Magazine*. Ms. Echols received her B.A. degree with honors in Economics and Political Science from Yale University. She earned her JD from Stanford Law School and served as an editor on the Stanford Law Review.

**Kristin Groos Richmond**  
**Chief Executive Officer**  
**Revolution Foods**

Kristin currently serves as co-founder and Chief Executive Officer of Revolution Foods. Kristin founded Revolution Foods in 2005 to transform the way we feed our students in this country by serving healthy meals and offering nutrition education to low income students. Prior to founding Revolution Foods, she was Vice President of Resources for Indispensable Schools and Educators, where she designed and executed strategy that grew the organization from a small community based program to a nationally scalable model working with more than 700 teachers and 60 public schools. From 2000 to 2002, Kristin lived in Nairobi and co-founded the Kenya Community Center for Learning (KCCL). She began her career at Citigroup in Investment Banking. Kristin is a member of the White House Council for Community Solutions and is a board member of KCCL, Lighthouse Community Charter School, and U.C. Berkeley's Global Social Venture Competition. She is also an Aspen Institute Entrepreneurial Leaders in Public Education Fellow, an Education Pioneers Fellow, and an Advisor to the Kauffman Foundation Entrepreneurship Program. In 2010, NewSchools Venture Fund named Kristin and her co-founder, Kirsten Tobey, Entrepreneurs of the Year. In 2007, she won the Global Social Venture Competition for the Revolution Foods model. Kristin holds a B.S. in Finance and Accounting from Boston College and an M.B.A. from U.C. Berkeley. She lives in the San Francisco Bay Area with her husband Steve and two sons, Watts and Caleb.

**Orson Aguilar**  
**Executive Director**  
**Greenlining Institute**

→ I met him & interviewed w/ him Referred by TYQUELA

Orson is part of the new wave of civil rights and community leaders focused on ensuring that the American Dream remains accessible to all Americans. Born and raised in East Los Angeles, Aguilar has advocated tirelessly on behalf of communities of color and youth for nearly 20 years.

After receiving his undergraduate degree in psychology from UC Santa Cruz, Aguilar obtained his Master of Public Affairs at the Lyndon B. Johnson School of Public Affairs at the University of Texas at Austin. He continued his education at the Congressional Hispanic Caucus Institute (CHCI) and the Greenlining Institute Leadership Academy

Impressed by Greenlining's holistic approach to advocacy, Aguilar joined the organization full-time as Program Manager at age 25. His skills and vision led to a series of promotions over the next 10 years, and in 2009, at age 35, Aguilar was unanimously selected by the Institute's board to succeed retiring founder John Gamboa as the organization's second executive director ever.

During Aguilar's 11 years, the Greenlining Institute has grown into an organization with a \$3.5 million budget, expanding under his leadership to have a presence in Washington

D.C. and Los Angeles – leading the San Francisco and Washington, D.C Examiner newspapers to comment, “Aguilar has taken the tactics that work so well in California on the road.” He has played key organizing and advocacy roles to ensure that the interests of communities of color and low-income Americans were considered during corporate mergers and acquisitions, resulting in billions of dollars in investments for non-profits, families and small businesses.

Aguilar has become a nationally recognized advocate for communities of color on issues such as the environment, community reinvestment, philanthropy, and leadership development. He has presented in front of Congress and at countless trainings and conferences around the country. He has authored numerous reports and editorials on key issues facing the nation, including columns published in the San Francisco Chronicle, Sacramento Bee and American Banker. Aguilar regularly meets with Fortune 100 CEOs and with leading financial regulators, including Federal Reserve Chairman Ben Bernanke, Federal Deposit Insurance Corporation Chair Sheila Bair, and House Financial Services Committee Chairman Barney Frank.

Aguilar was recently honored by the New Leaders Council with its 40 Under 40 Leadership Award for exemplifying the spirit of progressive political entrepreneurship, and was named an upcoming Latino leader by the nation’s largest Hispanic newspaper, La Opinion. He chairs the Board of Directors of the Mission Economic Development Agency (MEDA), and is a member of the University of California Santa Cruz’s Alumni Association Board.

**Darien Louie**  
**Director of Public & Private Partnerships**  
**East Bay Community Foundation**

Darien Louie is responsible for developing and strengthening our partnerships with key leaders in business, government, and the non-profit sectors aimed at making change so that the East Bay becomes a better and healthier place to live. She has over 32 years of experience in program development, fund development and community investment in the non-profit, public, and corporate sectors.

Before coming to the Foundation, Louie served as a Community Development Officer for the Greater Bay Region at Wells Fargo Bank. Prior to that, she was an independent consultant specializing in community economic development work in the East Bay. She previously served at the United Way of the Bay Area, where she headed their offices in Alameda and Contra Costa counties, managing grant making and fund development. She also spent 12 years at the Port of Oakland, creating an employment-services program for Oakland residents and serving as Manager of Personnel and Employee Services.

Darien Louie serves on the Board of Directors for Inner City Advisors and is on the Business Department Advisory Council for Laney College, the Oakland Adult & Career Education Community Advisory Board, and PG&E’s Community Advisory Group.

She holds a Bachelor's degree in English from the University of California, Berkeley and a Master's degree in Education from the University of San Francisco.

### ***Round Table Discussion: Access To Capital.***

**Tricia Kerney-Willis**  
**Manager, Office of Training and Outreach**  
**U.S. Department of the Treasury**  
**Community Development Financial Institutions Fund**

Tricia Kerney-Willis is Manager of the Office of Training and Outreach at the U.S. Department of the Treasury, Community Development Financial Institutions Fund (CDFI Fund). She oversees public and private sector stakeholders relationships to increase awareness of CDFI Fund programs, and national outreach and training initiatives for Community Development Financial Institutions (CDFIs) and Community Development Entities (CDEs). Prior to joining the Department of the Treasury in 2009, Ms. Kerney-Willis was a Vice President in the Consumer Real Estate division at Bank of America Corporation in Washington, DC and served as an Assistant Vice President and Relationship Client Manager in the Community Development division. She began her career in community development finance at Baltimore Community Lending, a CDFI, where she managed the Commercial and Multifamily Lending division and provided loans to small, minority, and women-owned real estate developers and investors for the rehabilitation and adaptive reuse of vacant and abandoned properties in underserved communities. She is a graduate of the State University of New York at Buffalo where she earned a Bachelor of Arts in Political Science, a Master of Science in Public Affairs, and a Master of Urban Planning from the university's School of Architecture and Planning.

**Kat Taylor**  
**Founding Director**  
**One PacificCoast Bank and Foundation**

Kat is active in a variety of social business, public benefit and philanthropic ventures in the San Francisco Bay Area. Currently, she focuses on beneficial banking services and food systems through two primary organizations.

Kat and her husband, Tom Steyer, are the Founding Directors of One PacificCoast Bank and Foundation, a triple bottom line Federal Savings Bank in Oakland CA. One PacificCoast Bank lends in low-income communities to support local economies and job creation. It is also attempting to help low income individuals and households build and protect assets through fair and innovative banking products. One PacificCoast operates throughout California and the West Coast.

Great person to know

Kat is also a Founding Director of TomKat Ranch Educational Foundation dedicated to a return to sustainable food production through ranching, tours, research, and school lunch and garden programs. Related to that work, Kat is a Partner in INKA, a startup renewable food company pioneering closed loop food systems that use very little water, soil or other scarce resources and no harmful chemical agents to grow produce and fish in home, educational, and developing world settings.

Since 1986, Kat has served as a member of the Board of Directors of the Good Samaritan Family Resource Center, a nonprofit entity which helps new immigrant families in San Francisco access needed services, stabilize in the country, develop self-sufficiency and participate in the community. She also serves on the Board of Directors of the Insight Prison Project, a nonprofit organization working in collaboration with San Quentin State Prison. The project provides unique rehabilitation programs that help self-selected, motivated prisoners break the cycle of incarceration.

In prior non-profit work, Kat served as a member of the Board of Directors of KQED, Inc., the Bay Area and Northern California's public radio and television station. She was also a member of the Board of Directors of the Yerba Buena Center for the Arts, multidisciplinary art center, located in the Yerba Buena Gardens district of downtown San Francisco, features visual arts, performing arts, film and educational programs, from 1996 to 2002. Kat graduated from Harvard College in 1980 with a Bachelor of Arts degree. She earned a joint JD/MBA degree from the Stanford Law School and the Stanford Graduate School of Business, graduating in 1986.

**Robert R. Davenport III**  
**Managing Partner**  
**Brightpath Capital Partners LP**

Rob is Managing Partner of Brightpath Capital Partners, LP (BCP) and Chairman of Up Communications Services, LLC (UCS). BCP is a private equity investment fund focused on emerging growth companies in the Bay area and west coast that generate attractive ROI and positive social impact. BCP measures social impact in terms of job and wealth creation in low wealth communities, and pollution and carbon footprint reduction. UCS is a national information technology and outsourced fulfillment services company, headquartered outside of Nashville, TN.

Prior to founding BCP and UCS, he was President and CEO of Covad International, a DSL-based broadband services provider with operations in Asia and Europe. He began his tenure with Covad Communications as Executive Vice President of Corporate Development. Mr. Davenport also served as Senior Vice President and General Manager of TCLINET, the high speed internet access subsidiary of Tele-Communications, Inc. (now Comcast). Previously, he was Vice President of TCI Telephony Services, as well as a member of the board of directors of Teleport Communications Group and Sprint PCS. Earlier in his career, Mr. Davenport served as Chief Financial Officer of Intellicall, Inc. and as Director of Corporate Development for TLC Beatrice Foods International. He

began his career at First Boston and Lehman Brothers investing in both leveraged buyouts and risk arbitrage.

He served on the Board of Directors of MCI, Inc. until it was acquired by Verizon in 2006, and on the Board of Trustees of St. Paul's Episcopal School in Oakland, California from 2003 to 2009, including three years as Chairman. He currently serves on the Board of Directors of OneCalifornia, Bank, FSB and the East Bay Community Foundation.

Mr. Davenport earned his Bachelor of Arts degree and a Masters in Business Administration from Harvard University. He also completed postgraduate work in political economy at the University of Nairobi, Kenya as a Rotary Fellow.

**Felicia Pierson**

**Managing Director**

**Small Business Lending, OBDC Small Business Finance**

As Managing Director, Felicia is responsible for the small business lending portfolio focusing on transactions up to \$250,000. She joined OBDC Finance in 2007 after a career in corporate banking in New York City where she was responsible for a \$2.4bn loan portfolio. Prior to her work as a credit risk manager with various global banking firms, Ms. Pierson served as a United States Peace Corps Volunteer in Cameroon, West Africa, where she taught math and physics at the secondary school level. In addition, she was the director of the Peace Corps' highly popular regional summer school program.

In addition to her work at OBDC, Felicia also serves as Co-Chairperson of West Oakland Neighbors and as an alternate representative on the West Oakland Project Area Committee.

Felicia is happy to return to the non-profit sector through OBDC Finance. This marks an alignment with her personal mission of working to increase economic and community development in underserved communities.

Felicia holds an MBA from the Stern School of Business at New York University and a BS Degree from Southern University A&M College.

*U.S. Department of the Treasury*  
*Community Development Financial Institutions Fund*

The mission of the U.S. Department of the Treasury's Community Development Financial Institutions Fund (CDFI Fund) is to increase economic opportunity and promote community development investments for underserved populations and in distressed communities in the United States. In the early 1990s, Congress recognized that many of the critical social problems afflicting our nation's low-income communities were rooted in a host of critical economic problems: stagnant growth, widespread unemployment and deep poverty, and inadequate access to financial services and financial education. To help to revitalize these communities, Congress established the CDFI Fund by enacting the Riegle Community Development and Regulatory Improvement Act of 1994.

There are many different types of CDFIs—including community development banks, credit unions, loan funds, and venture capital funds—but all of them are dedicated to serving low-income communities that lack access to credit, capital, and financial services from mainstream financial institutions. CDFIs offer retail banking services as well as financing for small businesses and microenterprises, affordable housing projects, and social service organizations. They also provide additional services—such as business planning, credit counseling, and homebuyer education—to help their borrowers use credit effectively. Since its creation, the CDFI Fund has made more than \$1.3 billion in awards to CDFIs and has allocated \$29.5 billion in New Markets Tax Credits.

*Operation Hope*

HOPE is a global non-profit, public benefit organization that teaches financial literacy and economic empowerment. HOPE promotes "silver rights" – making free enterprise and capitalism relevant and effective for the underserved. Operating in 71 U.S. communities and seven provinces in South Africa, HOPE has served more than 1.4 million youth and adults, raised more than \$500 million and directing and restructuring nearly \$500 million more in mortgages and economic support from the private sector, for a total of approximately \$1 billion dollars in economic activity, HOPE seeks dignity and empowerment for all. Former U.S. President Bill Clinton says of Operation HOPE in his book entitled GIVING, "Both young people and adults need basic knowledge about how our economy functions as well as the skills to make it work for them. Operation HOPE seeks to give those skills to people who otherwise would be left out and left behind."

The Oakland HOPE Center, the only HOPE Financial Literacy Empowerment Center in Northern California, has been serving low-wealth residents in the East Bay and surrounding communities since 2005. HOPE has provided financial literacy empowerment education to more than 22,181 youth, over 11,142 adults, provided one-on-one credit counseling to 6,396 individuals, and offered high speed internet access with computer usage to 20,443 members of the Inner City Cyber Café located within the Oakland HOPE Center. The Oakland HOPE Center staff also secured mortgage and business loan commitments of \$61.5 million to 299 low-to-moderate income home buyers and business owners over the past 6 years.



## **OCCUR**

OCCUR was founded in 1954 at a time when the City of Oakland, CA was transforming from a mid-sized working class community to one of the country's most complex and diverse cities came with all of the issues related to urban renewal. This transformation included all of the issues linked to increased urban migration, emerging poverty, new demands for social services and affordable housing. The Oakland Citizens Committee for Urban Renewal (OCCUR) was dedicated to monitoring Oakland's transformation into a new urban melting pot with all its big city challenges, and the need to develop Oakland's neighborhoods with Federal resources and programs. OCCUR's founding members were convinced that Oakland needed an independent organization that was prepared to confront emerging poverty, urban blight and increased migration by populations of color. Now, in its role as an intermediary and public service policy organization OCCUR provides critical services and programs in community technology, nonprofit capacity building, consumer education, equitable development/drill down and civic engagement.

Over its more than 50 year history, OCCUR has consistently served as a community "watchdog" agency and has honed its strategic effectiveness in serving the interests and improved quality of life for low-income youth, residents and families in the balanced delivery of goods, effective public policy and community services.

Today, OCCUR remains firmly rooted in the overall goal of raising the quality of life for all of Oakland/East Bay residents, with an emphasis on serving those in the greatest need of balanced delivery of goods, effective public policy and services.

### ***Inner City Advisors***

ICA's mission is to build sustainable and responsible inner city businesses that create quality jobs, reinvest in the community and contribute to the local economy. ICA provides a model for growing businesses and building communities by offering strategic advice, practical entrepreneurial education and access to key networks, resources, and capital that launch businesses to success. Building on the initiative and research of Harvard Business School Professor, Michael E. Porter, ICA strives to develop competitive and sustainable companies that have long-term impact on inner city communities.

### ***Green For All***

Green For All is a national organization working to build an inclusive green economy strong enough to lift people out of poverty. We are dedicated to improving the lives of all Americans through a clean energy economy. We work in collaboration with the business, government, labor, and grassroots communities to create and implement programs that increase quality jobs and opportunities in green industry – all while holding the most vulnerable people at the center of our agenda.

Green For All operates effectively at a number of different levels to build a clean-energy economy that closes the gaps in income, opportunity, security and health across the country. Its work covers a broad spectrum and takes many forms, including, pulling together workforce development agencies; training young community leaders to be world-class spokespersons for the clean-energy economy; developing business tools for small green enterprises; or advocating on Capitol Hill for green job training for vulnerable communities. As varied as it is, this work all flows from three primary tasks: to innovate policy, develop capacity, and build a movement.

### **Capital Access Program**

Green For All's Capital Access Program (CAP) is designed to create, sustain, and scale green jobs in the U.S. CAP leverages the work of Green For All's policy and field teams to build the capacity of stakeholders and mobilize capital so that our advocacy leads to real economic recovery and environmental restoration. CAP provides resources and research, hosts several business academies throughout the year, and has two coaching and mentorship programs for green entrepreneurs.

### ***OBDC Small Business Finance***

OBDC Small Business Finance offers commercial loans to start-up and existing businesses in the San Francisco Bay Area, with emphasis on Alameda, Contra Costa, San Francisco, and Solano counties. The organization offers term loans at fixed competitive interest rates to firms unable to obtain conventional financing. OBDC's mission is to strengthen the local economy by providing small business loans and other resources to entrepreneurs capable of stimulating economic development and job creation in Oakland's and other low-moderate income Bay Area communities.

### ***The Network for Teaching Entrepreneurship (NFTE)***

The Network for Teaching Entrepreneurship (NFTE) provides programs that inspire young people from low-income communities to stay in school, to recognize business opportunities and to plan for successful futures. Our vision is that all young people can find their path to success. NFTE Bay Area began operations in 1994. Since then, we have taught over 10,000 students from San Francisco, Alameda, Santa Clara, Marin, San Mateo and Sonoma entrepreneurship and basics of starting and operating a small business. Currently 26 NFTE Bay Area Certified Entrepreneurship Teachers (CETs) are reaching nearly 1,000 high school students annually.