



Sovereign Lending Task Force Meetings

- How can tribes access Individual Development Accounts for tribal members who want to save money to purchase their first home, pay for education expenses or start a new business?
- What kind of customized training is available for individuals who would like to promote financial literacy to tribal members.
- What is the “Healthy Communities” initiative and how tribes can participate to help improve the overall health of their communities.
- How can tribes increase the availability of business loans for tribal members located on Indian reservations?
- What are Community Action Agencies and how can tribes and banks collaborate with them to help build stronger communities?

You are invited to join any of the following meetings of the *Sovereign Lending* Task Forces. The purpose of the meetings is to increase access to credit/capital and to promote community and economic development in Indian Country. Invited participants include Tribal leaders, community development planners and housing authority professionals; financial institution CRA officers and lenders and government agencies. There is no charge for lunch or participating in any of the task force meetings, however, we welcome any offers to sponsor lunches.

(1) Cow Creek Band of Umpqua Tribe of Indians, Wednesday, January 9, 2002 11:00 a.m. – 1:30 p.m.

Tribal Headquarters Building, 2371 N.E. Stephens Street, Suite 100, Roseburg, OR 97470
(Lunch Provided)

Web site: <http://www.cowcreek.com/>

Topic/Presenter:

Individual Development Accounts for Tribal Members

Individual Development Accounts (IDAs) are emerging as one of the most promising tools to enable low-income American families save, build assets and enter the financial mainstream. IDAs reward the monthly savings of working-poor families who are trying to buy their first home, pay for post-secondary education, or start a small business. This reward or incentive is provided through the use of matching funds that typically come from a variety of private and public sources. Learn about how tribal members can participate in an IDA program in their community. Here's a link to information on IDAs: <http://cfed.org/>

**Robin Wahl, Community Development Planner,
Umpqua Regional Council of Governments**

Business Loan Roundtable

Learn about the products and services of area lenders.

**Bernie Kronberger, CRA Officer, Wells Fargo Bank
Ron Piatt, Commercial Loan Officer, Umpqua Bank**

Directions: From I-5, take Stewart Parkway Exit 127 and go east on Edenbower Blvd. Turn right (south) on Stevens Street (Hwy. 99) and look for the tribal headquarters about ¾ mile on the left.
Directions questions? Call (541) 672-9405.

- (2) **Lower Elwha Klallam Tribe, Friday, January 11, 2002 11:00 a.m. – 1: 30 p.m.**
Lower Elwha Housing Authority, 22 Kwitsen Drive, Port Angeles, WA (*Lunch Provided*)
Website: <http://www.elwha.org/>

Topic/Presenter: **Individual Development Accounts for Tribal Members**
Learn about how IDAs can help tribal members save money to purchase their first home, or for education.
Melinda Szatlocky, Family Sufficiency Coordinator, Clallam County Housing Authority
Janet Abbett, Program Manager, WorkFirst Division, Office of Trade and Economic Development

Healthy Communities
Healthy Communities initiatives promote a concept of health that recognizes that people's health and quality of life are dependent on many community systems and factors -- not simply a well-functioning health and medical care system. Learn more about the formal and informal community systems that contribute to "healthy communities" and discuss how they can be offered in Indian Country. Also, learn about four current initiatives: Literacy, Access to Healthcare, Communities in Schools, and a new Community Resource and Referral System.
Patty Hannah, Executive Director, United Way Clallam County

Directions: *From Hwy. 101, turn north (right if going west, left if headed east) at Laird Corner, which is located about 5 miles west of Port Angeles. You will notice a park & ride lot nearby. Follow Laird Road, which becomes Edgewood Drive, and turn left on Lower Elwha Road, another left on Stratton Road, another left on Kweynesen Road, and right on Hupt Lane. Need help with directions? Contact John Williamson at (360) 452-8471 Ext. 115.*

- (3) **Muckleshoot Tribe, Wednesday, January 16, 2002 11:00 a.m. to 1:30 p.m.**
Muckleshoot Casino, 2402 Auburn Way S., Auburn, WA 98002 (*Lunch Provided*)
Muckleshoot Tribe's Homepage: <http://www.tulaliptribes.com/>
Tribal Staff Directory: <http://www.goia.wa.gov/directory/pdf/i-muckle.pdf>

Topic/Presenter: **Business Loan Roundtable**
Learn about the products and services of area mortgage lenders.
Gary Masterjohn, Branch Manager, Timberland Bank
Robert Williams, Vice President, Seattle Business Banking Center-Community Banking, Washington Mutual Bank
Steve Moergli, CRA Officer, Mt. Rainier National Bank

Lillian McGinnis, Branch Manager, Columbia Bank
Juan Aguilar, Vice President and Senior Business Development
Manager, Washington Mutual Bank

Individual Development Accounts

Learn about how IDAs can help tribal members save money to purchase their first home, or for education.

Vince Matulionis, Director, Homelessness Initiative,
United Way of King County
Linda Purlee, Program Director, Multiservice Center
Stephanie Boschee, Program Director, Multiservice Center
Janet Abbett, Program Manager, WorkFirst Division, Office of
Trade and Economic Development

Directions:

From Seattle or Tacoma:

*From Interstate 5, take the #142A exit. Follow Hwy 18 to the
Auburn Way/Enumclaw exit. Turn left at light onto Auburn Way
South/Hwy 164. The Casino is 2 miles ahead on the left.
Directions questions? 1-800-804-4944*

(4) Lummi Nation, Friday, January 18, 2002 11:00 a.m. – 1: 30 p.m.

Lummi Planning Building, 2828 Kwina Road, Bellingham, WA 98226 *(Lunch Provided)*

Tribal Staff Directory: <http://www.goia.wa.gov/directory/pdf/g-lummi.pdf>

Tribal Profile: <http://www.npaihb.org/profiles/lummi.html>

Topic/Presenter:

USDA Rural Development: Partners for Rural America

USDA Rural Development is committed to helping improve the economy and quality of life in all of rural America. Its financial programs support such essential public facilities and services as water and sewer systems, housing, health clinics, emergency service facilities and electric and telephone service. They promote economic development by supporting loans to businesses through banks and community-managed lending pools. They offer technical assistance and information to help agricultural and other cooperatives get started and improve the effectiveness of their member services. Finally, they provide technical assistance to help communities undertake community empowerment programs. Their website is: <http://www.rurdev.usda.gov/>

Susan Davenport, Community Development Manager, USDA
Rural Development

Jan Cyr, Rural Utilities Specialist, USDA Rural Development

Individual Development Accounts

Learn about how IDAs can help tribal members save money to purchase their first home, or for education.

Thomas Wilson, Program Director, The Whatcom Dream
Janet Abbett, Program Manager, WorkFirst Division, Office of
Trade and Economic Development

Community Action Agencies

Community Action Agencies (CAAs) are nonprofit private and public organizations established under the Economic Opportunity Act of 1964 to fight America's War on Poverty. Community Action Agencies help people to help themselves in achieving self-sufficiency. Today there are approximately 1,000 Community Action Agencies in the United States, and 13 are located in Washington State. You can learn more about CAAs at: <http://www.nacaa.org/>

Annette Desalvo, Community Resource Manager, Opportunity Council

Business Loan Roundtable

Learn about the products and services of area mortgage lenders.

Robert Williams, Vice President, Seattle Business Banking Center-Community Banking, Washington Mutual Bank

Mike Camfield, CRA Officer, Peoples Bank

Juan Aguilar, Vice President and Senior Business Development Manager, Washington Mutual Bank

Directions:

From I-5, take Exit 260 and go west over the freeway on Slater Road. Continue about 2 miles to first light and turn left on to Haxton Road for about one mile. Turn right on Kwina Road, and look for the Lummi Planning Building on the right. Directions questions? Call Mary Kauffmann at (360) 384-2295.

RVSP Now

To RSVP for a meeting, please contact me by email at craig.nolte@sf.frb.org , by phone at (206) 343-3761, or by fax at (206) 343-3632. Finally, please contact me if you are interested in taking a leadership position with any of the task forces. I am looking forward to seeing you again and working with you on this important initiative.

Sincerely,

Craig A. Nolte
Community Affairs Advisor
craig.nolte@sf.frb.org