

**Attachment 2: Small Local Bank Contact Log**

#	County	Institution Name	Assets	SCVWD Contact Dates	Date RFP Emailed to Bank	Additional Notes (name of person at the bank, title, contact info, etc.) (VM = voicemail)	SCVWD Staff
1	Santa Clara	Avidbank	\$ 679,260,000	5/1/2020, 5/14/2020	5/1/2020	Charlene discussed RFP with Joan Secoquian Senior Vice President, Relationship Manager. This is not in their "wheelhouse" and they would like to thank the Board for the opportunity, but they will not be able to respond.	Charlene Sun, Treasury and Debt Officer
2	Santa Clara	Commonwealth Central	\$ 519,785,907	5/4/2020,	5/5/2020	Left VM for Craig Weber, CEO/President, and gave my and Charlene's call back number; called again and spoke to Alan got the general email address; service@wealthcu.org	Prachi Tara, Staff Analyst
3	Santa Clara	Excite CU (Alliance)	\$ 461,546,278	5/1/2020, 5/14/2020	5/1/2020	Left VM for Pam Vegas, Assistant Vice President, Operations.	Prachi Tara, Staff Analyst
4	Santa Clara	Heritage Bank of Commerce	\$ 319,233,000	5/1/2020, 5/14/2020	5/1/2020	Emailed and called Celeste Drake, Vice President	Charlene Sun, Treasury and Debt Officer
5	Santa Clara	Meriwest	\$ 1,544,934,448	5/1/2020, 5/4/2020	5/1/2020	Charlene discussed RFP with AJ Elias, VP of Banking.	Charlene Sun, Treasury and Debt Officer
6	Santa Clara	Mission City	\$ 99,918,960	5/4/2020		Left VM for David Waterman, CEO/President, and gave my and Charlene's call back number.	Prachi Tara, Staff Analyst
7	Santa Clara	Pacific Postal	\$ 216,445,139	5/4/2020,		Spoke with Fardad Khosravi, Manager, and he said they don't do that.	Prachi Tara, Staff Analyst
8	Santa Clara	Pinnacle Bank	\$ 295,562,000	5/1/2020, 5/14/2020	5/1/2020	Spoke with Desiree Gonzalez, Branch Manager, and she will forward the email to Regional Manager to look into it.	Prachi Tara, Staff Analyst
9	Santa Clara	Premier One	\$ 425,235,576	5/4/2020		Spoke with Loan Department (Jacky) and she said they only do business in personal loans and mortgages.	Prachi Tara, Staff Analyst
10	Santa Clara	Provident CU		5/1/2020, 5/14/2020	5/1/2020	Cynthia Castillo, Personal Account Officer, said unfortunately, at this time we do not offer commercial lending for businesses	Prachi Tara, Staff Analyst
11	Santa Clara	Santa Clara County	\$ 755,558,905	5/4/2020	5/5/2020	Spoke with Loan Department (Amanda) and provided her the info regarding the email, my contact number and Charlene's email ID. She'll pass the message to CEO/President, Rebecca Reynolds, Lytle. Rebecca's assistant, Jim Guss, called back on 5/5 at 12:12. Got his email address. Will forward the email to him.	Prachi Tara, Staff Analyst
12	Santa Clara	Technology	\$ 2,552,158,690	5/1/2020, 5/14/2020	5/1/2020	Emailed and called Neeraja Mandlekar, Branch Manager (San Jose)	Prachi Tara, Staff Analyst
13	Alameda	Bay Cities	\$ 77,608,789	5/1/2020, 5/12/2020	5/1/2020	Left VM for Georgette Munoz, Bank contact person from FDIC, asking her to call me back.	Steve Peters, Senior Mgmt Analyst
14	Alameda	Beneficial State Bank	\$ 644,767,000	5/1/2020, 5/12/2020	5/1/2020	5/12/20 (4:43PM): Emailed inquiry (not RFP) to Grant Word, who is listed on website (with no voice contact #) as contact for Business Loans.	Steve Peters, Senior Mgmt Analyst
15	Alameda	Chabot	\$ 70,360,810	5/1/2020, 5/13/2020	5/1/2020	5/13/20 (4:25PM): Spoke to Andrea A. Boutte (Lending & Operations Mgr.): they don't provide commercial/business loans services.	Steve Peters, Senior Mgmt Analyst
16	Alameda	Community Bank of the Bay	\$ 224,571,000	5/1/2020, 5/13/2020	5/1/2020	Emailed Jenniffer Collins on 5/13/20 to confirm that she received RFP. She confirmed receipt but says they won't be proposing.	Steve Peters, Senior Mgmt Analyst

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17	Alameda	Cooperative Center	\$ 122,607,134	5/5/2020		Called Loan Dept. which had me call Lyndsey Youmans @ 510-295-1640. Left VM with my call back.	Steve Peters, Senior Mgmt Analyst
18	Alameda	FBCU	\$ 20,140,865	5/4/2020		Unable to establish contact; number out of service,	Prachi Tara, Staff Analyst
19	Alameda	Gateway Bank, F.S.B.	\$ 142,149,000	5/5/2020		Spoke to Loan Dept Jennifer Zhai about what we're looking for. Said she'd have Gary Fan call me back.	Steve Peters, Senior Mgmt Analyst
20	Alameda	Matson Employees	\$ 29,167,214	5/6/2020	5/6/2020	Emailed inquiry (not RFP) to email address after outgoing voice message requested callers to do so instead of leaving VM. Membership is for employees of Matson, Inc., a U.S. owned and operated transportation services company HQ'd in Honolulu, Hawaii, with a Oakland Corporate Office.	Steve Peters, Senior Mgmt Analyst
21	Alameda	Metropolitan Bank	\$ 140,639,000	5/6/2020		Called main number. Said was interested in business line of credit (which their website) says they provide. Introduced myself to guy who answered, and told him what about LOC, asked him if they might be interested. He said "no" and hung up as I was asking him his name.	Steve Peters, Senior Mgmt Analyst
22	Alameda	Moore West	\$ 15,767,638	5/7/2020		Left VM for Laura Keyes (contact person listed) and emailed inquiry (not RFP) to Member Services.	Steve Peters, Senior Mgmt Analyst
23	Alameda	Sea West Coast Guard	\$ 361,146,422	5/1/2020, 5/15/2020	5/1/2020	Spoke to Loan Rep. They don't provide business lines of credit.	Steve Peters, Senior Mgmt Analyst
24	Alameda	SMW 104	\$ 97,122,516	5/6/2020		Spoke to Yvonee in Loan Dept. She said that they don't do business lending, only consumer lending. And membership is limited to Sheet Metal Workers Int'l Assn. Local 104. So they're not interested.	Steve Peters, Senior Mgmt Analyst
25	Alameda	Summit Bank	\$ 193,741,000	5/1/2020, 5/14/2020	5/1/2020	Spoke to Credit Rep. Denise Dodini. Said that this is probably something they wouldn't be interested in as a local bank with only \$298M in Assets and the capital coverage they would need on a Line of	Steve Peters, Senior Mgmt Analyst
26	Alameda	University of California Livermore Employees (UNCLE)	\$ 449,200,508	5/5/2020,	5/5/2020	Sent RFP to Tony Bezek (Contact Center Rep) who answered main line. Emailed Tony the RFP. Tony said would provide to management. Per Tony and website, customers served are in Alameda, Contra Costa, San Joaquin, and Stanislaus counties (only), although certain financial products may be provided in other counties.	Steve Peters, Senior Mgmt Analyst
27	Alameda	Utility District	\$ 33,622,970	see Notes		Credit Union for current and former employees of EBMUD, so didn't call.	
28	San Francisco	Bank of San Francisco	\$ 212,960,000	5/1/2020, 5/13/2020	5/1/2020	Victor Vazquez, VP, Community & Social Responsibility Manager, said thank you but they are not able to submit a proposal at this time.	Marie Martinez, Mgmt Analyst II
29	San Francisco	Bank of the Orient	\$ 238,083,000	5/5/2020	5/5/2020	Sent RFP	Marie Martinez, Mgmt Analyst II
30	San Francisco	California Pacific Bank	\$ 102,498,000	5/5/2020	5/5/2020	Sent RFP	Marie Martinez, Mgmt Analyst II
31	San Francisco	DELANCEY STREET FEDERAL	\$ 391,052	5/5/2020		Per Mike Boris, bank contact, they're too small.	Marie Martinez, Mgmt Analyst II
32	San Francisco	Jones Methodist Church	\$ 590,634	5/5/2020		Left Voice Msg	Marie Martinez, Mgmt Analyst II
33	San Francisco	McKesson Employees Federal CU	\$ 27,570,601	5/5/2020	5/5/2020	Spoke with Kaye and got Christopher Bruno, CEO/President's email id. Left VM for Christopher and will send email	Prachi Tara, Staff Analyst

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34	San Francisco	Mission National Bank	\$ 189,260,000	5/5/2020		Left Voice Msg. New contact person is Mintel, bank contact. Person was unable to give me the last name or email address.	Marie Martinez, Mgmt Analyst II
35	San Francisco	Northeast Community	\$ 10,947,287	5/1/2020, 5/13/2020	5/1/2020	Left msg and will ask Lily Lo, bank contact, to return my call	Marie Martinez, Mgmt Analyst II
36	San Francisco	NORTHERN CALIFORNIA LATVIAN	\$ 1,452,899	5/5/2020		# is no longer in svc & new # unknown	Marie Martinez, Mgmt Analyst II
37	San Francisco	Presidio Bank or Heritage Bank of Commerce	\$ 224,501,000	5/5/2020		Left sg with Luc Farby, who will forward info to Keith Wilton, CEO/President	Marie Martinez, Mgmt Analyst II
38	San Francisco	S.F Bay Area Educators	\$ 19,050,590	5/1/2020, 5/13/2020	5/1/2020	Left VM& asked to return my call	Marie Martinez, Mgmt Analyst II
39	San Francisco	S.F Police	\$ 904,477,627	5/5/2020		Hung up on me	Marie Martinez, Mgmt Analyst II
40	San Francisco	San Francisco Lee Credit Union	\$ 12,284,727	5/5/2020		Spoke to bank rep who said they don't do LOCs.	Prachi Tara, Staff Analyst
41	San Mateo	Liberty Bank	\$ 242,011,000	5/5/2020	5/5/2020	Spoke to bank rep & left msg.	Marie Martinez, Mgmt Analyst II
42	San Mateo	Menlo Survey FCU	\$ 64,713,211	5/1/2020, 5/13/2020	5/1/2020	Left VM& asked to return my call	Marie Martinez, Mgmt Analyst II
43	San Mateo	Polam	\$ 73,755,814	5/5/2020	5/5/2020	Was transferred to leave a msg, but couldn't give me other info.	Marie Martinez, Mgmt Analyst II
44	San Mateo	San Mateo City Employees	\$ 34,177,653	5/5/2020		Left VM at Gen # 650-522-7070. Office temp. closed	Marie Martinez, Mgmt Analyst II
45	San Mateo	Sequoia	\$ 33,632,369	5/1/2020, 5/13/2020	5/1/2020	Left VM& asked to return my call	Marie Martinez, Mgmt Analyst II
46	San Mateo	SOUTH SAN FRANCISCO CITY EMP	\$ 3,335,123	5/4/2020	5/5/2020	got this email id from the automated message of the company: ssfemployeecreditunion@outlook.com	Prachi Tara, Staff Analyst
47	San Mateo	SRI	\$ 94,194,363	5/1/2020, 5/13/2020	5/1/2020	Contacted Steve Bowles, CEO/President, said not in their scope since they're a small CU but will call once they review again	Marie Martinez, Mgmt Analyst II
48	San Mateo	Upward CU	\$ 74,690,075	5/5/2020		Left VM for Linda White, CEO/President	Prachi Tara, Staff Analyst
49	San Mateo	USE My CU	\$ 33,583,366	5/4/2020		Left VM for Alex Casillas, CEO/President, and gave my and Charlene call back number.	Prachi Tara, Staff Analyst

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