



## Item 6 - Disclosure Report

Ryan Micik, Chair  
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TO: Public Ethics Commission  
FROM: Alex Van Buskirk, Lead Analyst, Compliance and Disclosure  
Jelani Killings, Lead Analyst, Education and Engagement  
DATE: May 29, 2024  
RE: Disclosure and Engagement Monthly Report for the June 12, 2024,  
Regular PEC Meeting

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This memorandum provides a summary of major accomplishments in the Public Ethics Commission's (PEC or Commission) Disclosure and Engagement program activities since the last regular meeting.

Commission staff disclosure activities focus on improving online tools for public access to local campaign finance and other disclosure data, enhancing compliance with disclosure rules, and conducting data analysis for Public Ethics Commission projects and programs as required.

Engagement activities include training and resources provided to the regulated community, as well as general outreach to Oakland residents to raise awareness of the Commission's role and services and to provide opportunities for dialogue between the Commission and community members.

### **Compliance with Disclosure Requirements**

Commission staff conducts filing officer duties as required by state and local law and aims to help candidates, lobbyists and City officials submit required disclosure reports and ensure residents can easily access campaign finance, lobbyist, and ethics-related data and information.

**Campaign Finance Disclosure** – Several committees were referred to Enforcement in May 2024 due to their non-filing status of required campaign statements. Referrals were made after numerous attempts by Commission staff to contact the non-filers to gain voluntary compliance. The committees referred for Enforcement are: Move Oakland Forward Now (ID# 1440969); Joel Velasquez for Oakland School Board 2022 (ID# 1450818); Harold Lowe for City Council 2022 (ID# 1453436); and Cherisse Gash for Oakland School Board District 3 (ID# 1428671).

The second semi-annual statement deadline is upcoming, on July 31, 2024, and covers activity through June 30, 2024. Upcoming pre-election deadlines related to the November 5, 2024, election are September 26, 2024, and October 24, 2024.

Campaign statements are available to view and download at the Public Ethics Commission's [Public Portal for Campaign Finance Disclosure](#). Campaign finance data, graphs, and visualizations are available via Commission-sponsored apps [Show Me the Money](#), [OpenDisclosure](#), [Oakland's Open Data portal](#), and links on the Public Ethics Commission website.

**Lobbyist Registration Program** – The Oakland Lobbyist Registration Act (LRA) requires any person that qualifies as a lobbyist to register annually with the Commission before conducting any lobbying activity. Registration renewals were due January 31. To date, 52 lobbyists have registered with the City of Oakland for 2024.



In November 2023, the Oakland City Council adopted amendments to the Lobbyist Registration Act including a new annual lobbyist registration fee as well as a requirement that lobbyists take an online training provided by the Commission. To date, 47 lobbyists have taken the online training provided by the Commission and the Commission has received new annual lobbyist registration fees from over two-thirds of the registered lobbyists. Commission staff is monitoring online training and new fee payment activity to ensure compliance by registered lobbyists.

The LRA also requires lobbyists to submit quarterly reports disclosing their lobbying activities to ensure that the public knows who is trying to influence City decisions. April 30 was the deadline for quarterly lobbyist activity reports covering the period from January 1, 2024, through March 31, 2024. All registered lobbyists who were required to file their quarterly lobbyist activity reports did so. Three reports were filed several days past the deadline. Commission staff are in the process of assessing late fees in accordance with Commission policies.

An up-to-date list of registered lobbyists and lobbyist activity reports with links to view and download individual reports is available at the Public Ethics Commission's [Lobbyist Dashboard and Data](#) webpage.

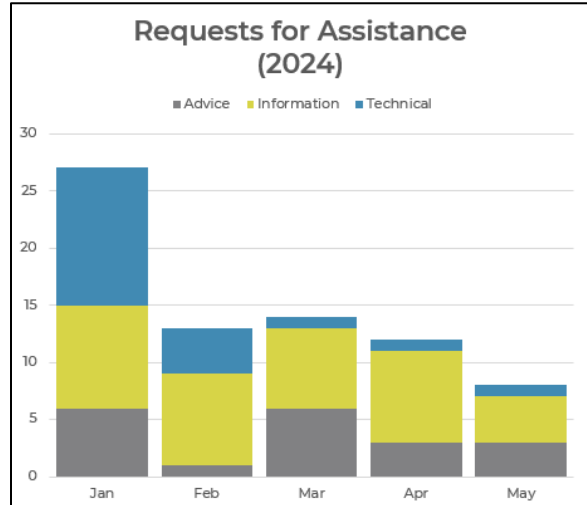
### **Advice and Engagement**

The Commission's Engagement program seeks to ensure Oakland public servants, candidates for office, lobbyists, and City contractors understand and comply with City campaign finance, ethics, and transparency laws.

**Advice and Technical Assistance** – Between April 2024 and May 2024, Commission staff responded to 20 requests for information, advice or assistance regarding campaign finance, ethics, Sunshine law, or lobbyist issues.

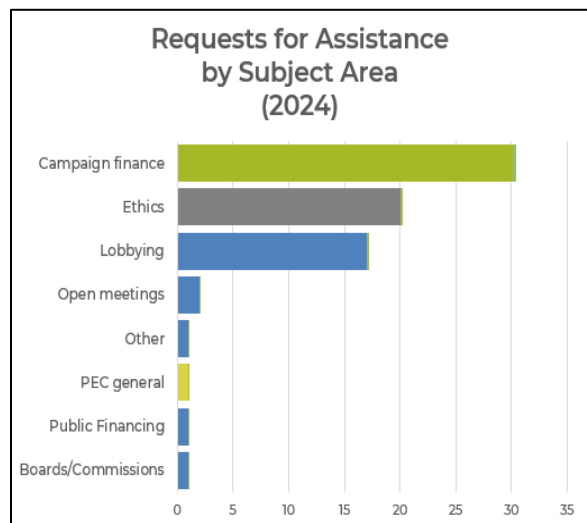
**New Employee Orientation** – Commission staff continues to make presentations at the City’s monthly New Employee Orientation (NEO) providing new employees with an introduction to the Public Ethics Commission and overview of the Government Ethics Act (GEA).

In the months of April and May, Commission staff trained over 80 new employees on GEA provisions. Employees required to file Form 700 were also assigned the Commission’s mandatory online Government Ethics Training for Form 700 Filers.



**Supervisory Academy** – On May 23, 2024, Commission staff facilitated an ethics discussion for the City’s quarterly Supervisory Academy. The discussions are intended to allow for more meaningful dialogue concerning ethical values in decision making with a focus on identifying ethical dilemmas that City staff face in carrying out their daily duties.

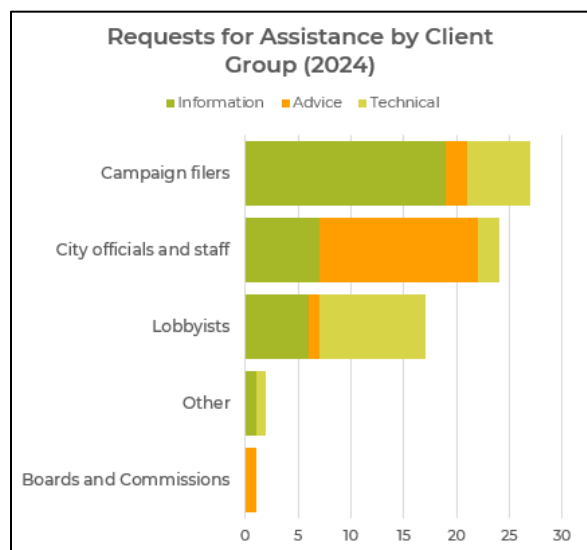
Commission staff provided an overview of the Government Ethics Act including conflicts of interests, gift restrictions, and postemployment restrictions.



A total of 44 employees attended the training.

**Candidate and Treasurer Training** – On April 12, 2024, Commission staff conducted a joint candidate and treasurer training with representatives from the California Fair Political Practices Commission (FPPC). 15 individuals participated in this training.

The attendees received a two-hour training on the California Political Reform Act and the Oakland Campaign Reform Act. Topics covered included campaign forms, committee IDs, campaign bank accounts, recordkeeping, contribution rules, and advertising disclosures.



**OPRYD Ethics Training** – On May 29, 2024, Commission staff conducted an ethics training for over 100 new employees of the Oakland Parks, Recreation, and Youth Development Department during their summer staff orientation. Commission staff provided an overview of the Public Ethics Commission and the City’s Government Ethics Act.

### Online Engagement

**Website Migration** – The City of Oakland is in the process of transitioning its website to a new content management system (CMS), OpenCities. The new website is scheduled to launch in July 2025. In the initial phase of the migration process, Commission staff has been working with the City’s project team to review the Public Ethics Commission’s current webpages and determine which ones will migrate to the new website. Concurrently, Commission staff will also be updating current webpages to improve content and formatting.

The table below shows the Public Ethics Commission’s most visited webpages (data is for views that occurred between March 2023 and March 2024).

Page Name	Pageviews
City Council Salaries	356
Democracy Dollars Program   Oakland Fair Elections Act	334
Lobbyist Rules	290
What Are Democracy Dollars?	277
Candidates and Campaigns	261
Campaign Finance Rules and Disclosure	253
Public Ethics Commission Enforcement Program	242
Disclosure Information and Data	187
Ethics for City Staff, Elected Officials and Board...	157
Oakland Sunshine Ordinance	156

**Social Media** – Commission staff has continued producing monthly social media content highlighting the Commission’s upcoming meetings, how to file an enforcement complaint, and transparency requirements for political ads and candidate’s social media accounts.