



## Item 6 - Staff Memo with Timeline

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Nicolas Heidorn, Executive Director

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TO: Public Ethics Commission  
FROM: Suzanne Doran, Project Lead/Analyst  
Nicolas Heidorn, Executive Director  
DATE: June 2, 2023  
RE: Measure W Oakland Fair Elections Act Implementation Update for the June 14, 2023, Regular PEC Meeting

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With the passage of Measure W, the Oakland Fair Elections Act, the Public Ethics Commission (PEC or Commission) is planning for a transition of growth in staffing, structure, and responsibilities as administrator of a completely re-designed public financing program. This memorandum provides an update on implementation activities since the last Commission meeting and a timeline for implementation tasks.

### Operational Changes and Tasks

**Budget** – The Mayor’s Proposed Budget postpones implementation of the Democracy Dollars voucher program to the 2026 election. While the budget does include significant funding for program start-up costs, no funding was included for additional staff resources to implement the program.

After the PEC’s May meeting, Commission staff forwarded a letter signed by the Commission Chair to the Mayor and Councilmembers expressing the Commission’s desire for funding to conduct a scaled-down pilot program for the 2024 election in lieu of program postponement. Executive Director Heidorn presented the Commission’s priorities and impacts of the proposed budget for PEC programs at a Special Council Meeting on May 30. In addition, staff met with the City Council budget team, including Council President Bas, Councilmembers Fife, Jenkins, and Kaplan, and their staff, and separately with the Mayor’s staff to share the Commission’s budget priorities and answer questions about the funds needed to carry-out a limited pilot program for the 2024 election. Meetings with the remaining Councilmembers are scheduled in early June. The Council President’s proposed budget amendments will be published on June 12<sup>th</sup> for discussion at the June 14<sup>th</sup> Council meeting. The City Council is scheduled to adopt the final budget at the June 26<sup>th</sup> Council meeting.

### Administrative Processes and Technology

In May, staff met with the City of Oakland’s print services department to discuss production and mailing requirements for the Democracy Dollars voucher and information packet. Requirements were forwarded to the City of Oakland’s approved print service contractors, and one vendor provided an initial quote. Commission staff submitted follow-up questions

and are now awaiting vendor responses to assist in refining the service contract, cost estimates, and determine deadlines should the Commission receive funding for a pilot.

Discussions with the Alameda County Registrar of Voters (ROV) indicate that the Democracy Dollars program requires a unique contract for services to verify resident signatures on vouchers as well as qualifying contributions to participating candidates. Staff discussions with ROV leaders to develop a secure, efficient process and identify services that will be part of the PEC contract with the ROV are ongoing.

Commission staff also met with Seattle Democracy Dollars staff and Oakland ITD staff to discuss options to simplify or reduce tech development needs should the PEC conduct a limited pilot in 2024.

### **Outreach and Engagement**

**Online engagement** – In May, Commission staff added a webpage with links to implementation updates to the [Democracy Dollars Program](#) website content.

**Candidates and Campaigns** – Updating education and training resources targeted to candidates to include new campaign finance rules impacting upcoming elections is underway and will be prioritized in the coming months.

**Community** – Chair Micik and Vice Chair Hill co-wrote an op-ed published in the [SF Chronicle](#) making the case for a limited Democracy Dollars pilot in 2024. The op-ed was shared on the Commission’s social media accounts in addition to general posts to raise awareness of the Democracy Dollars webpage.

OAKLAND FAIR ELECTIONS ACT – DEMOCRACY DOLLARS PROGRAM

## Implementation Overview with Key Dates

Phase 1: Preliminary Tasks	
Nov 2022 – June 2023 Activities and Outcomes	
Nov 2022	<ul style="list-style-type: none"> <li>✓ Preliminary research and analysis of requirements for program administration.</li> <li>✓ Begin coordination with other City stakeholders and agencies.</li> </ul>
Dec 2022 – Jan 2023	<ul style="list-style-type: none"> <li>✓ 2023 – 2025 fiscal year budget preliminary deliverables including Democracy Dollars (DD) program complete.</li> <li>✓ Updates to job specifications and civil service examination process for new staff positions.</li> <li>✓ Business requirements for technology outlined in partnership with ITD.</li> <li>✓ Establish advisory group/liaison with City Administrator’s office and internal stakeholders.</li> </ul>
Feb 2023	<ul style="list-style-type: none"> <li>✓ Submit budget proposal with funding for DD program.</li> <li>✓ Submit DD job specifications for union approval.</li> <li>✓ Receive and incorporate feedback into tech system requirements.</li> </ul>
Mar 2023	<ul style="list-style-type: none"> <li>✓ Present budget proposal with PEC priorities for DD program to Mayor.</li> <li>✓ Response to union re: DD job specifications.</li> <li>✓ Draft milestones, success metrics for program roll-out for discussion.</li> <li>✓ Research DD design, printing, and distribution needs.</li> <li>✓ Initiate RFP process for tech and voucher production services with Finance Department.</li> </ul>
Apr 2023	<ul style="list-style-type: none"> <li>✓ Develop program webpages to chart implementation progress.</li> <li>✓ Draft requirements and request quotes for printing and mailing of DD packets.</li> <li>✓ Outreach plan development started.</li> </ul>
May – Jun 2023	<ul style="list-style-type: none"> <li>• Evaluate and cost options for Democracy Dollars pilot program. – <b>ongoing</b></li> <li>• Draft tech RFP in partnership with ITD and Finance Department. – <b>in progress</b></li> <li>• Revise to education resources to reflect OCRA amendments. – <b>ongoing</b></li> <li>• Draft tech RFP in partnership with ITD and Finance Department. – <b>in progress</b></li> <li>• Vendor selection for printing and mailing of DD packets. – <b>in progress</b></li> <li>• Identify services needed and develop process for signature verification by Alameda County ROV. – <b>ongoing</b></li> <li>• Issue tech system RFP.</li> </ul>
Phase 2: Program Foundations	
Jul - Dec 2023	
Jul 2023	<p><b>MILESTONE 1:</b> Program funds budgeted.</p> <p><b>MILESTONE 2:</b> Vendor identified for printing and mailing of DD packets.</p> <ul style="list-style-type: none"> <li>• Tech vendor selection in partnership with ITD and Finance Departments.</li> <li>• Identify policy questions requiring Commission action prior to 2024 launch.</li> <li>• Recruitment for new positions (subject to final budget).</li> <li>• Outreach plan development (subject to final budget).</li> </ul>
Aug 2023	<p><b>MILESTONE 3:</b> Vendor approved; tech system development begins.</p> <ul style="list-style-type: none"> <li>• Preliminary development of forms, systems for program administration.</li> </ul>
Sep – Oct 2023	<p><b>MILESTONE 4:</b> New positions filled; staff onboarded.</p> <ul style="list-style-type: none"> <li>• Adopt Commission regulations prior to 2024 launch, as needed.</li> <li>• Evaluate progress towards milestones required for 2024 launch date.</li> </ul>
Nov – Dec 2023	<ul style="list-style-type: none"> <li>• Publish outreach and training materials for Oakland residents, candidates.</li> <li>• Finalize service contract and process for signature verification by Alameda County ROV.</li> </ul>

<b>Phase 3: Program Launch</b>	
<b>Jan - Nov 2024</b>	
<b>Jan 2024</b>	<ul style="list-style-type: none"> <li>• DD funds available announcement.</li> <li>• Candidate application process begins.</li> <li>• Outreach to raise awareness of Democracy Dollars program.</li> </ul>
<b>Feb - Mar 2024</b>	<ul style="list-style-type: none"> <li>• Ongoing outreach to raise awareness of Democracy Dollars program.</li> </ul> <p><b>MILESTONE 5:</b> DD voucher, packet, and mailing information ready for printing and distribution.</p> <p><b>MILESTONE 6:</b> Tech system MVP tested and ready to deploy.</p>
<b>Apr 2024</b>	<ul style="list-style-type: none"> <li>• Tech system live.</li> <li>• DD distribution to Oakland registered voters by April 1, 2024.</li> <li>• Voucher assignment system and public program dashboard live.</li> </ul>
<b>May – Nov 2024</b>	<ul style="list-style-type: none"> <li>• PEC staff processes DD vouchers, disburses funds to candidates.</li> </ul>
<b>Phase 4: Post-election Evaluation</b>	
<b>Dec 2024 - ongoing</b>	<ul style="list-style-type: none"> <li>• Candidates return unused funds.</li> <li>• Program audit, performance evaluation reports for Commission and City Council.</li> <li>• Tech system and outreach development continues, user-experience, data-informed improvements.</li> </ul>