



ETHICS COMMISSION CITY AND COUNTY OF SAN FRANCISCO

Form SFEC-3.216(d) Gifts of Travel Instructions

Who is required to file this form?

Under section 3.216(d) of the San Francisco Campaign and Governmental Conduct Code, this form must be filed by an elected officer who either

- accepts a gift of transportation, lodging, or subsistence for any out-of-state travel that is paid for in part by an entity other than the City and County of San Francisco, another governmental body, or a bona-fide educational institution as defined in section 203 of the Revenue and Taxation Code, or that is paid for by the City in whole or in part with funds donated from any entity other than another governmental body or bona fide educational institution as defined in Section 203 of the Revenue and Taxation Code; or
- reimburses the entity for the gift of transportation, lodging or subsistence in order to avoid receiving a gift.

Who is an elected officer for the purposes of the restrictions in section 3.216(d)?

The elected officers who are governed by section 3.216(d) include the Mayor, any member of the Board of Supervisors, the City Attorney, the District Attorney, the Public Defender, the Assessor-Recorder, the Treasurer and the Sheriff.

When must the elected officer fill out this form?

The elected officer must fill out this form and file it with the Ethics Commission ***before accepting*** a gift of transportation, lodging or subsistence that is paid for in part by an entity other than the City and County of San Francisco, another governmental body or a bona fide educational institution as defined in Section 203 of the Revenue and Taxation Code.

The elected officer must fill out this form and file it with the Ethics Commission ***before accepting*** a gift of transportation, lodging or subsistence that is paid for by the City in whole or in part with funds donated from an entity other than another governmental body or a bona fide educational institution as defined in Section 203 of the Revenue and Taxation Code.

If the elected officer ***reimburses*** the gift of transportation, lodging or subsistence, the elected officer must fill out this form and file it with the Ethics Commission ***within 30 days*** of such reimbursement.

What is a gift of transportation, lodging or subsistence?

A gift of transportation, lodging or subsistence is a benefit that is provided to and confers a personal benefit to the elected officer for which the officer does not provide goods or services of equal or greater consideration.

Are there other rules related to the acceptance of a gift of out-of-state transportation?

Yes. Both state and local law require additional reporting of gifts accepted by individuals and on behalf of the City, as well as place restrictions on gifts that elected officers may receive. ***Please note that all gift limits and reporting requirements imposed by the Political Reform Act and local law remain applicable.*** Please see the Ethics Commission's Manual on Governmental Ethics Laws or the City Attorney's Good Government Guide for additional information. If you have questions, please call the Ethics Commission or the City Attorney's Office.

An entity provides the gift of transportation to your agency. Are you still required to file a report even though it is not deemed a gift to you?

Yes, if you are the elected officer who is taking the out-of-state travel, lodging or subsistence, you must fill out and file Form SFEC-3.216(d) before you travel.

Are you required to fill out the entire form?

No. Depending on the circumstances, you are required to fill out and file Schedule A, B or C. In addition, you must fill out, sign and file the cover page. Estimates may be used in advance; but if expenses vary from estimates, the form must be amended after travel is completed.

- If you are reporting a gift of transportation, lodging or subsistence for any out-of state travel paid for in whole or in part by an entity other than the City and County of San Francisco, another governmental agency, or a bona fide educational institution, please fill out the cover page and Schedule A. Please file these pages with the Ethics Commission before you travel.
- If you are reporting a gift of transportation, lodging or subsistence for any out-of-state travel paid for by the City in whole or in part with funds donated from an entity other than another governmental body or bona fide educational institution, please fill out the cover page and Schedule B. Please file these pages with the Ethics Commission before you travel.
- If you are reporting the reimbursement of a gift of transportation, lodging or subsistence related to out-of-state travel in order to avoid having received or accepted the gift, please fill out the cover page and Schedule C. Please file these pages with the Ethics Commission within 30 days of the reimbursement.

In filling out Form SFEC-3.21(d), please type or print legibly in ink. Please use additional sheets if necessary.

If you have questions, please contact the Ethics Commission at 415/252-3100.

Form SFEC-3.216(d)
Cover Page

Please type or print legibly in ink.

1. Information regarding Elected Officer:			
Name (Last)	(First)	(Middle)	Daytime Telephone
			()
Mailing Address	Street	Zip	Fax Telephone
			()
Office Held	Email Address		

2. Purpose of Travel:

4. Schedule Summary:
Total number of pages, including this cover page _____
<i>Check applicable schedules:</i>
Schedule A <input type="checkbox"/> Yes – schedule attached <i>Gift of transportation, lodging or subsistence</i>
Schedule B <input type="checkbox"/> Yes – schedule attached <i>Gift to the City of transportation, lodging or subsistence</i>
Schedule C <input type="checkbox"/> Yes – schedule attached <i>Reimbursement to the City of gift of transportation, lodging or subsistence</i>

3. Dates of Travel and Itinerary:
Month/Day/Year _____ City, State, Country _____

5. Verification:
I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge, the information contained herein and in any attached schedules is true and complete.
I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.
Date signed _____
Signature _____

Form SFEC-3.216(d) Schedule A – Gifts of Travel

1. Information regarding entity funding gift of transportation, lodging or subsistence

Full Name of Entity:

Address:

Street City State Zip

Name of Contact Person:

Email Address: Telephone:
_____ () _____

3. Cost of transportation, lodging or subsistence

A. Please list the total amount of costs that will be paid by the entity to fund the elected officer's travel, including but not limited to the amount directly related to the cost of the officer's transportation, lodging and subsistence.

B. Please list the amount in Item A that is directly related to the cost of the officer's transportation, lodging and subsistence.

2. Information regarding contributors who contributed more than \$500 to the entity to fund the trip

Please list the name, occupation and employer of any contributor who contributed more than \$500 to the entity funding the trip and whose contributions were used in whole or in part to fund the trip:

Name of Contributor

Occupation of Contributor

Employer of Contributor

Name of Contributor

Occupation of Contributor

Employer of Contributor

Name of Contributor

Occupation of Contributor

Employer of Contributor

Check box if additional schedules are attached.

4. Information regarding persons accompanying the elected officer

Please list the name of any individual who is

- (a) a City employee required to file a Statement of Economic Interests,
- (b) a lobbyist or campaign consultant registered with the Ethics Commission;
- (c) an employee of or individual who has an ownership interest in a lobbyist or campaign consultant registered with the Ethics Commission; or
- (d) an employee or officer of the entity that will pay for the gift of transportation, lodging or subsistence, and

who is accompanying the elected officer on the trip.

Please identify whether the individual is category (a), (b), (c), or (d), as described above.

Name of Individual	Category
_____	_____
_____	_____
_____	_____

Check box if additional schedules are attached.

Form SFEC-3.216(d)
Schedule B – Gifts to the City

1. Information regarding entity that donated funds to the City that will be used by the City to fund the elected officer's transportation, lodging or subsistence

Full Name of Entity:

Address:

Street City State Zip

Name of Contact Person:

Email Address: Telephone:
 _____ () _____

3. Cost of Transportation, Lodging or Subsistence

A. Please list the total amount of costs that will be paid by the entity to fund the elected officer's travel, including but not limited to the amount directly related to the cost of the officer's transportation, lodging and subsistence.

B. Please list the amount in Item A that is directly related to the cost of the officer's transportation, lodging and subsistence.

2. Information regarding contributors who contributed more than \$500 to the entity to fund the trip

Please list the name, occupation and employer of any contributor who contributed more than \$500 to the entity funding the trip and whose contributions were used in whole or in part to fund the trip:

Name of Contributor

Occupation of Contributor

Employer of Contributor

Name of Contributor

Occupation of Contributor

Employer of Contributor

Name of Contributor

Occupation of Contributor

Employer of Contributor

Check box if additional schedules are attached.

4. Information regarding persons accompanying the elected officer

Please list the name of any individual who is

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- (b) a lobbyist or campaign consultant registered with the Ethics Commission;
- (c) an employee of or individual who has an ownership interest in a lobbyist or campaign consultant registered with the Ethics Commission; or
- (d) an employee or officer of the entity that will pay for the gift of transportation, lodging or subsistence, and

who is accompanying the elected officer on the trip.

Please identify whether the individual is category (a), (b), (c), or (d), as described above.

Name of Individual	Category
_____	_____
_____	_____
_____	_____

Check box if additional schedules are attached.

Form SFEC-3.216(d)
Schedule C - Reimbursement

1. Information regarding entity that originally paid for the elected officer's transportation, lodging or subsistence

Full Name of Entity:

Address:

Street City State Zip

Name of Contact Person:

Email Address: Telephone:
_____ () _____

2. Cost of transportation, lodging or subsistence

Please list the total amount of costs that was paid by the entity to fund the elected officer's travel, including but not limited to the amount directly related to the cost of the officer's transportation, lodging and subsistence.

3. Information regarding the Amount reimbursed by the elected officer to the entity

Please list the amount reimbursed by the elected officer to the entity.

Please describe the process used to determine the fair-market value of the cost of the officer's transportation, lodging and subsistence, as reported in item 3(a).
