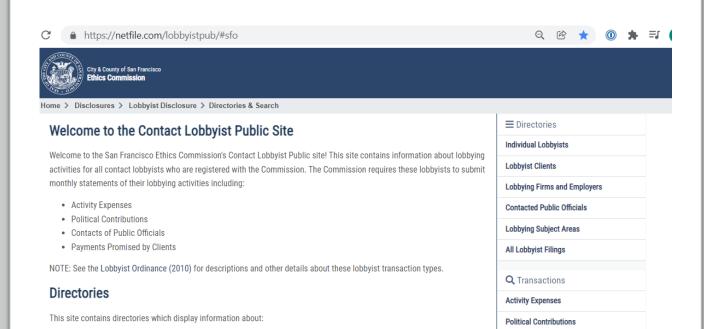# SF Ethics Commission

## Lobbyist Contacts

Public Portal-
How To Review
Lobbyist Contacts

# Lobbyist Public Disclosure Portal

## Start Review

- Go to the Lobbyist Public Disclosure Portal at: https://netfile.com/lobbyistpub/#sfo

# Public Portal - Directories



The data in the Directories come from two types of filings:

- Registration Statements build the directories for
  - Individual Lobbyists
  - Lobbyist Clients*
  - Firms/Employers*
    - *Distinction on next slide
- Monthly Statements build the directories for
  - Contacted Public Officials
  - Lobbying Subject Areas
  - All Highlighted Transactions

# *Clients v Employer/Firm

Unlike other Lobbyist disclosure processes, San Francisco does not require entities that employee or contract with Lobbyists to register or disclose information. Individual Lobbyists are required to disclose information about their **Firm/Employers** and **Clients** via registration statements.

- Contact lobbyists must register if they make 5 contacts on behalf of their **Employer** (who provides them a W-2) or if they make 1 contact on behalf of a **Client** (independent/firm based contracts).

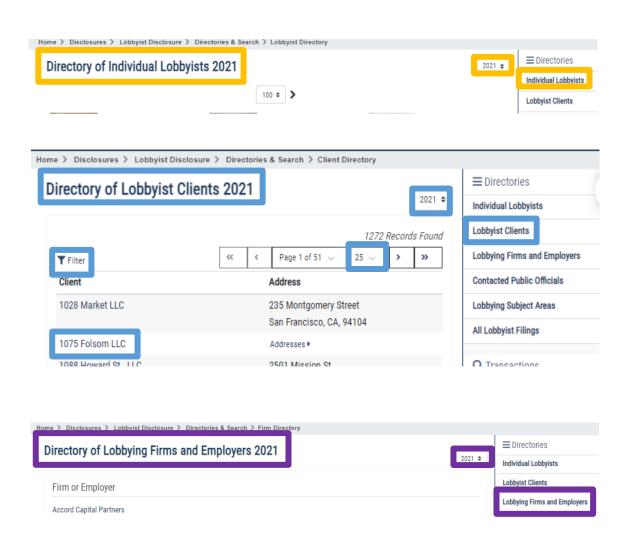*Scenario 1*: In-House Lobbyist (5 contacts)

- When a contact lobbyist qualifies by making five contacts on behalf of their **Employer**, the **Employer** is the **Client** and the client/employer/firm information should <u>match</u>.

*Scenario 2*: Contract/Firm-based Lobbying (1 contact)

- When lobbying **Clients** do not rely on their in-house employees to contact Public Officials, but pay for lobbying services to a firm/small business/independent contactor a lobbyist's Employer/Firm and Clients will not always match.
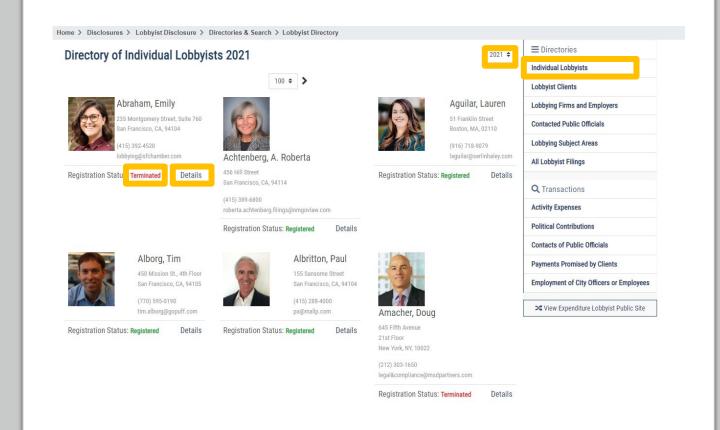
*Scenario 1*

**San Francisco Ethics Commission Contact**
**Lobbyist Registration**

**Marisa Rodriguez**
**291 Geary Street, Suite 200**
**San Francisco, CA. 94102**

**marisa@unionsquarealliance.com**
**415-781-4456**

Lobbyist Firm (If Any):
**Union Square Alliance**
**291 Geary Street, Suite 200**
**San Francisco, CA. 94102**

Clients

| Name | Address | Period |
|------|---------|--------|
| Union Square Alliance | 291 Geary Street, Suite 200 San Francisco, CA. 94102 | 12/15/2021 - Present |

*Scenario 2*

**San Francisco Ethics Commission Contact**
**Lobbyist Registration**

**Kenneth Rich**
**5274 Manila Avenue**
**Oakland, CA. 94618**

**ken@kjr-consulting.com**
**415-572-7244**

Lobbyist Firm (If Any):
**Kenneth J. Rich Consulting, LLC**
**5274 Manila Avenue**
**Oakland, CA. 94618**

Clients

| Name | Address | Period |
|------|---------|--------|
| San Francisco Whole Produce Market | 2095 Jerrold Avenue, Suite 212 San Francisco, CA. 94124 | 02/01/2021 - Present |

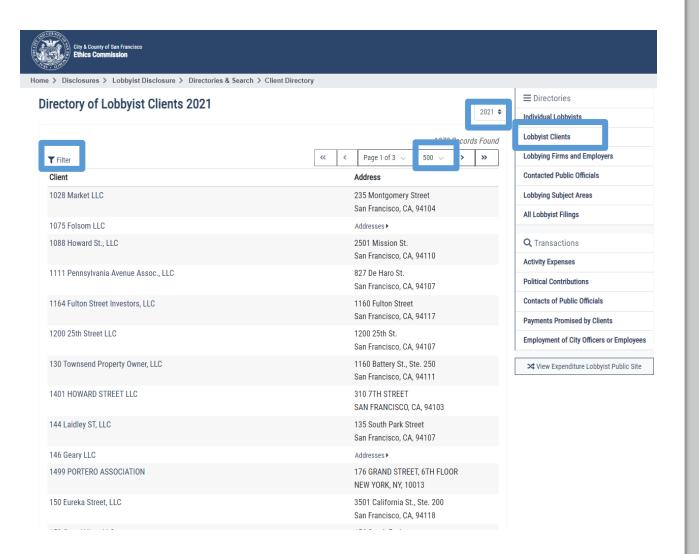# How to Utilize the Directories 1/2

- The Directories are organized by *Calendar Year*, and identifies:
  - All Lobbyists who registered
  - All Clients identified by Lobbyists
    - You can expand the number of clients that appear per page
    - By clicking on the Client's name you can see the Lobbyist(s) registered to provide lobbying services to the Client
  - All Firms and Employers
    - By clicking on the Firm/Employer's name you can identify the Employers and Firms that retain Lobbyist(s)

# Individual Lobbyist Directory

- The Individual Lobbyist Directory indentifies lobbyists that have been active in that Calendar Year.

- It provides their status (active/terminated).

- Details – Provides additional details, including clients represented, and activity reported per month.

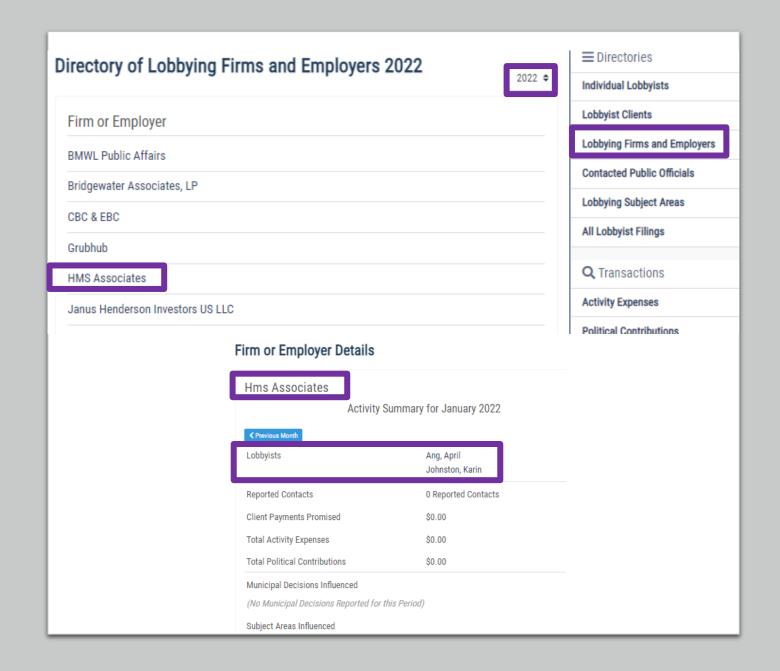  *Details are more easily reviewed via transactions instructions on slide 12.

# Client Directory

- If you want to search contacts by client, it is important to know how the name of the organization is entered into the system.
  - Filter Search or use Ctrl+F to search for client's by name
    - Clicking on the name of the client will tell you which lobbyists are registered to lobby on their behalf
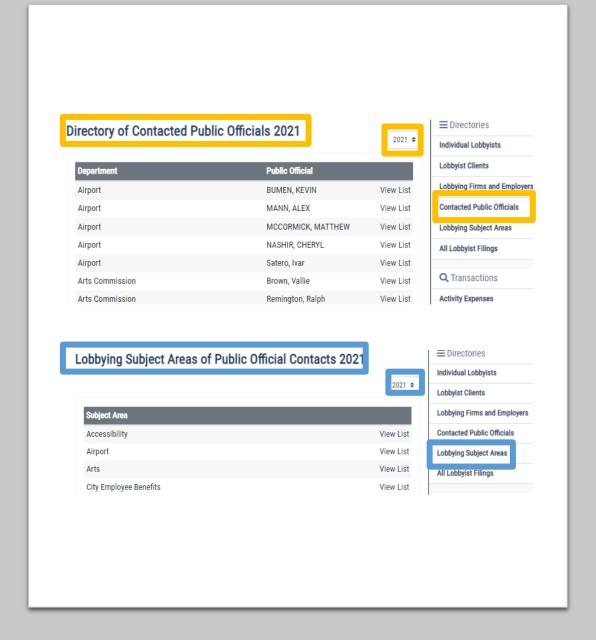
# Firm/Employer Directory

- If you want to identify registered firms/employers by year, it is important to know how the name of the organization is entered into the system.

  - Clicking on the name of the client will tell you which lobbyists are registered to lobby on their behalf
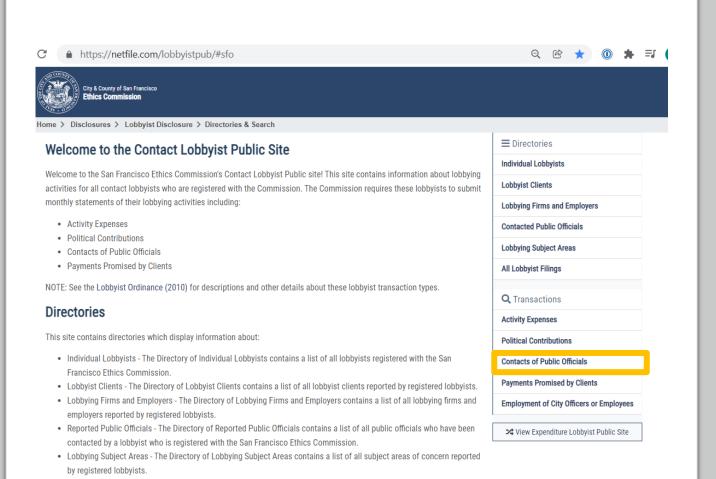
# How to Utilize the Directories 2/2

- The Directories are organized by _Calendar Year_, and identifies:
    - All Public Officials with whom a lobbyist reported a contact, the list is organized alphabetically by department and alphabetically by the last name of the Official.
    - All contacts organized by Subject Areas disclosed by Lobbyists

    *Note these two directories are created by disclosed contacts via Monthly Statement, the next few slides show a better way to review this data.
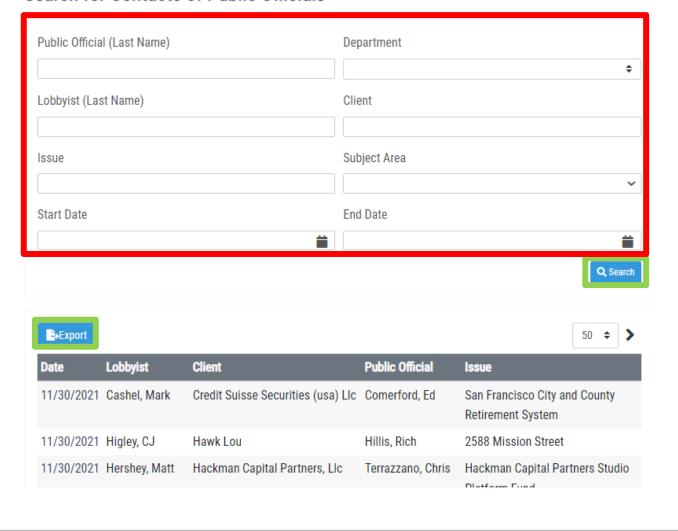
# Reviewing Contacts via Transactions

- From - https://netfile.com/lobbyistpub/#sfo

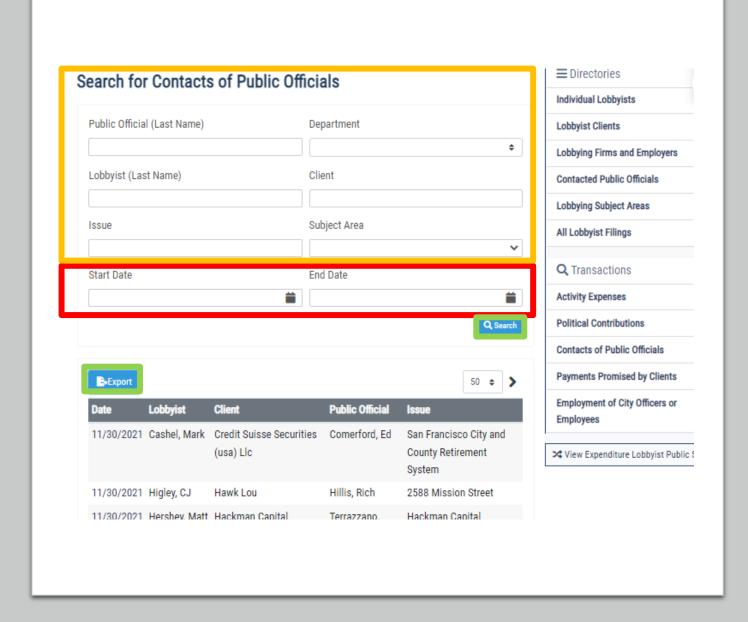- Click on "Contacts of Public Officials" Highlighted →

# Reviewing Contacts – Mass Review

- If you don't know where to start, you can initiate a general search by:
  - Click the Search box, with all fields blank which will generate an CSV/Excel exportable table
  - Chronologically generated
  - Includes the last 5000 disclosed contacts
    - Adjust dates if you want to find contacts that predate the last 5000 entered.
  - The loading time is long, be patient.

# Refine Searchable Criteria

- If you reviewed the directories, you can refine your search by combining any factors of interest.

- You can also further refine the search by date of contact.

# Exported CSV/Excel - Basics

- The exported downloadable data is limited to a maximum of 5,000 rows of data.

- Select the first row and type - Ctrl+Shift+L to sort and filter the data chronologically or alphabetically for the categories of:

  - Date

  - Lobbyist

  - Client

  - Public Official

  - Issue