

# 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>

The screenshot shows a web browser window with the address bar displaying <https://netfile.com/lobbyistpub/#sfo>. The page header features the City & County of San Francisco Ethics Commission logo and a navigation breadcrumb: Home > Disclosures > Lobbyist Disclosure > Directories & Search. The main content area is titled "Welcome to the Contact Lobbyist Public Site" and includes a welcome message and a list of transaction types: Activity Expenses, Political Contributions, Contacts of Public Officials, and Payments Promised by Clients. A "Directories" section follows, explaining that the site contains directories for Individual Lobbyists, Lobbyist Clients, Lobbying Firms and Employers, Reported Public Officials, and Lobbying Subject Areas. A right-hand sidebar menu lists various categories: Directories, Individual Lobbyists, Lobbyist Clients, Lobbying Firms and Employers, Contacted Public Officials, Lobbying Subject Areas, All Lobbyist Filings, Transactions, Activity Expenses, Political Contributions, Contacts of Public Officials, Payments Promised by Clients, and Employment of City Officers or Employees. At the bottom of the sidebar is a button labeled "View Expenditure Lobbyist Public Site".

# Public Portal - Directories

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



Home > Disclosures > Lobbyist Disclosure > Directories & Search

## Welcome to the Contact Lobbyist Public Site

Welcome to the San Francisco Ethics Commission's Contact Lobbyist Public site! This site contains information about lobbying activities for all contact lobbyists who are registered with the Commission. The Commission requires these lobbyists to submit monthly statements of their lobbying activities including:

- Activity Expenses
- Political Contributions
- Contacts of Public Officials
- Payments Promised by Clients

NOTE: See the Lobbyist Ordinance (2010) for descriptions and other details about these lobbyist transaction types.

## Directories

This site contains directories which display information about:

- Individual Lobbyists - The Directory of Individual Lobbyists contains a list of all lobbyists registered with the San Francisco Ethics Commission.
- Lobbyist Clients - The Directory of Lobbyist Clients contains a list of all lobbyist clients reported by registered lobbyists.
- Lobbying Firms and Employers - The Directory of Lobbying Firms and Employers contains a list of all lobbying firms and employers reported by registered lobbyists.
- Reported Public Officials - The Directory of Reported Public Officials contains a list of all public officials who have been contacted by a lobbyist who is registered with the San Francisco Ethics Commission.
- Lobbying Subject Areas - The Directory of Lobbying Subject Areas contains a list of all subject areas of concern reported by registered lobbyists.

### Directories

- Individual Lobbyists
- Lobbyist Clients
- Lobbying Firms and Employers

- Contacted Public Officials
- Lobbying Subject Areas
- All Lobbyist Filings
- Transactions
- Activity Expenses
- Political Contributions
- Contacts of Public Officials
- Payments Promised by Clients

Employment of City Officers or Employees

View Expenditure Lobbyist Public Site

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

## 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

# \*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 match.

### 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.

# 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)

The image displays three screenshots of a web application interface, each showing a different directory page. The top screenshot is titled "Directory of Individual Lobbyists 2021" and features a search bar with "100" and a dropdown menu with "2021". The middle screenshot is titled "Directory of Lobbyist Clients 2021" and shows a table with columns for "Client" and "Address". The bottom screenshot is titled "Directory of Lobbying Firms and Employers 2021" and shows a search bar with "Accord Capital Partners" and a dropdown menu with "2021".

**Directory of Individual Lobbyists 2021**

Home > Disclosures > Lobbyist Disclosure > Directories & Search > Lobbyist Directory

2021

Directories

Individual Lobbyists

Lobbyist Clients

100 >

**Directory of Lobbyist Clients 2021**

Home > Disclosures > Lobbyist Disclosure > Directories & Search > Client Directory

2021

1272 Records Found

Filter

<< < Page 1 of 51 25 > >>

Client	Address
1028 Market LLC	235 Montgomery Street San Francisco, CA, 94104
1075 Folsom LLC	Addresses ▶
1088 Howard St. LLC	2501 Mission St

Directories

Individual Lobbyists

Lobbyist Clients

Lobbying Firms and Employers

Contacted Public Officials

Lobbying Subject Areas

All Lobbyist Filings

Transactions

**Directory of Lobbying Firms and Employers 2021**

Home > Disclosures > Lobbyist Disclosure > Directories & Search > Firm Directory

2021

Directories

Individual Lobbyists

Lobbyist Clients

Lobbying Firms and Employers

Firm or Employer

Accord Capital Partners

# Individual Lobbyist Directory

- The Individual Lobbyist Directory identifies 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.

The screenshot displays the 'Directory of Individual Lobbyists 2021' page. The navigation bar at the top includes 'Home > Disclosures > Lobbyist Disclosure > Directories & Search > Lobbyist Directory'. A dropdown menu on the right side of the page is open, showing '2021' selected and 'Individual Lobbyists' highlighted. Below the navigation, the page title 'Directory of Individual Lobbyists 2021' is centered. A search bar and a dropdown menu for '100' items are visible. The main content area features six lobbyist profiles, each with a photo, name, address, phone number, and email. The registration status is indicated for each: Abraham, Emily (Terminated), Achtenberg, A. Roberta (Registered), Alborg, Tim (Registered), Albritton, Paul (Registered), Aguilar, Lauren (Registered), and Amacher, Doug (Terminated). A sidebar on the right contains a list of navigation options: Directories, Individual Lobbyists, Lobbyist Clients, Lobbying Firms and Employers, Contacted Public Officials, Lobbying Subject Areas, All Lobbyist Filings, Transactions, Activity Expenses, Political Contributions, Contacts of Public Officials, Payments Promised by Clients, and Employment of City Officers or Employees. A link at the bottom of the sidebar reads 'View Expenditure Lobbyist Public Site'.

# Client Directory

City & County of San Francisco  
Ethics Commission

Home > Disclosures > Lobbyist Disclosure > Directories & Search > Client Directory

## Directory of Lobbyist Clients 2021

2021

1079 Records Found

Filter

Page 1 of 3 500

Client	Address
1028 Market LLC	235 Montgomery Street San Francisco, CA, 94104
1075 Folsom LLC	Addresses ▶
1088 Howard St., LLC	2501 Mission St. San Francisco, CA, 94110
1111 Pennsylvania Avenue Assoc., LLC	827 De Haro St. San Francisco, CA, 94107
1164 Fulton Street Investors, LLC	1160 Fulton Street San Francisco, CA, 94117
1200 25th Street LLC	1200 25th St. San Francisco, CA, 94107
130 Townsend Property Owner, LLC	1160 Battery St., Ste. 250 San Francisco, CA, 94111
1401 HOWARD STREET LLC	310 7TH STREET SAN FRANCISCO, CA, 94103
144 Laidley ST, LLC	135 South Park Street San Francisco, CA, 94107
146 Geary LLC	Addresses ▶
1499 PORTERO ASSOCIATION	176 GRAND STREET, 6TH FLOOR NEW YORK, NY, 10013
150 Eureka Street, LLC	3501 California St., Ste. 200 San Francisco, CA, 94118

Directories

- Individual Lobbyists
- Lobbyist Clients**
- Lobbying Firms and Employers
- Contacted Public Officials
- Lobbying Subject Areas
- All Lobbyist Filings
- Transactions
- Activity Expenses
- Political Contributions
- Contacts of Public Officials
- Payments Promised by Clients
- Employment of City Officers or Employees

View Expenditure Lobbyist Public Site

- 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

Directory of Lobbying Firms and Employers 2022

2022

Firm or Employer

BMW Public Affairs

Bridgewater Associates, LP

CBC & EBC

Grubhub

HMS Associates

Janus Henderson Investors US LLC

Directories

Individual Lobbyists

Lobbyist Clients

Lobbying Firms and Employers

Contacted Public Officials

Lobbying Subject Areas

All Lobbyist Filings

Transactions

Activity Expenses

Political Contributions

Firm or Employer Details

Hms Associates

Activity Summary for January 2022

Previous Month

Lobbyists	Ang, April Johnston, Karin
Reported Contacts	0 Reported Contacts
Client Payments Promised	\$0.00
Total Activity Expenses	\$0.00
Total Political Contributions	\$0.00

Municipal Decisions Influenced  
*(No Municipal Decisions Reported for this Period)*

Subject Areas Influenced



# 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.

**Directory of Contacted Public Officials 2021**

Department	Public Official	
Airport	BUMEN, KEVIN	View List
Airport	MANN, ALEX	View List
Airport	MCCORMICK, MATTHEW	View List
Airport	NASHIR, CHERYL	View List
Airport	Satero, Ivar	View List
Arts Commission	Brown, Vallie	View List
Arts Commission	Remington, Ralph	View List

**Lobbying Subject Areas of Public Official Contacts 2021**

Subject Area	
Accessibility	View List
Airport	View List
Arts	View List
City Employee Benefits	View List

# Reviewing Contacts via Transactions

- From - <https://netfile.com/lobbyistpub/#sfo>
- Click on “Contacts of Public Officials” Highlighted →

The screenshot shows a web browser window with the URL <https://netfile.com/lobbyistpub/#sfo>. The page header includes the City & County of San Francisco Ethics Commission logo and navigation links: Home > Disclosures > Lobbyist Disclosure > Directories & Search.

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NOTE: See the Lobbyist Ordinance (2010) for descriptions and other details about these lobbyist transaction types.

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The right sidebar contains a menu with the following items:

- Directories
- Individual Lobbyists
- Lobbyist Clients
- Lobbying Firms and Employers
- Contacted Public Officials
- Lobbying Subject Areas
- All Lobbyist Filings
- Transactions
- Activity Expenses
- Political Contributions
- Contacts of Public Officials** (highlighted with a yellow border)
- Payments Promised by Clients
- Employment of City Officers or Employees

At the bottom of the sidebar, there is a button labeled "View Expenditure Lobbyist Public Site".

# 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.

## Search for Contacts of Public Officials

Public Official (Last Name)	Department
<input type="text"/>	<input type="text"/>
Lobbyist (Last Name)	Client
<input type="text"/>	<input type="text"/>
Issue	Subject Area
<input type="text"/>	<input type="text"/>
Start Date	End Date
<input type="text"/>	<input type="text"/>

Search

Export

50 >

Date	Lobbyist	Client	Public Official	Issue
11/30/2021	Cashel, Mark	Credit Suisse Securities (usa) Llc	Comerford, Ed	San Francisco City and County Retirement System
11/30/2021	Higley, CJ	Hawk Lou	Hillis, Rich	2588 Mission Street
11/30/2021	Hershey, Matt	Hackman Capital Partners, Llc	Terrazzano, Chris	Hackman Capital Partners Studio Platform Fund

# 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.

**Search for Contacts of Public Officials**

Public Official (Last Name) Department  
Lobbyist (Last Name) Client  
Issue Subject Area  
Start Date End Date

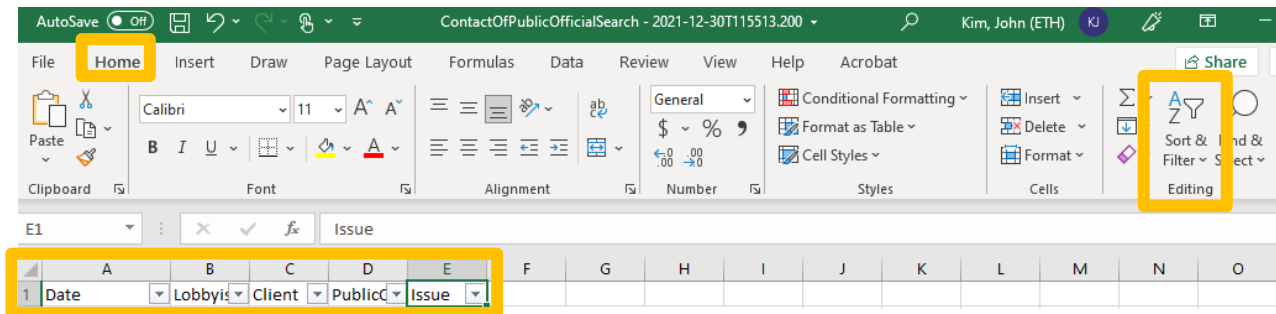
[Search](#)

[Export](#) 50 >

Date	Lobbyist	Client	Public Official	Issue
11/30/2021	Cashel, Mark	Credit Suisse Securities (usa) Llc	Comerford, Ed	San Francisco City and County Retirement System
11/30/2021	Higley, CJ	Hawk Lou	Hillis, Rich	2588 Mission Street
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Directories  
Individual Lobbyists  
Lobbyist Clients  
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Lobbying Subject Areas  
All Lobbyist Filings  
Transactions  
Activity Expenses  
Political Contributions  
Contacts of Public Officials  
Payments Promised by Clients  
Employment of City Officers or Employees  
[View Expenditure Lobbyist Public](#)

# 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