San Francisco Ethics Commission

Date: March 6, 2026

To: Members of the Ethics Commission

From: Steven Massey, Director of Technology Services

Subject: Agenda Item 5: Electronic Disclosure and Data Analysis (EDDA) Division Report

Summary

This report provides an overview of the activities of the Electronic Disclosure & Data Analysis (EDDA) Division for the period of September 2025 through February 2026. No action is required by the Commission, as this item is for informational purposes only.

Campaign Finance Dashboards

Since summer 2025, staff have worked to enhance the underlying data pipelines and redesign the user interface for the Campaign Finance Dashboards in preparation for the 2026 election cycle. The existing dashboard design presented limitations in mobile device usefulness and accessibility compliance, both of which are required under upcoming City's Digital Accessibility and Inclusion Standard (DAIS) and applicable U.S. Department of Justice standards.

The updated dashboards introduce high-level summaries of financial activity by contest, including top contributors and top committees supporting or opposing local candidates and ballot measures. Users may drill down from these summaries to view detailed information for individual candidate and ballot measure contests, as well as third-party fundraising and expenditures.

The redesigned dashboards are fully responsive to different screen sizes, scaling appropriately from mobile devices to desktop displays. This will allow users on any device, whether a small cell phone or a large desktop monitor, to have a seamless experience. The new interface complies with WCAG 2.1 Level AA accessibility standards and successfully passes WebAIM accessibility testing, an industry-recognized tool for evaluating web accessibility. Staff plan to include the dashboards in a comprehensive accessibility audit later this spring to ensure continued compliance.

Development is nearing completion, and the system will undergo user testing and outreach in March to media stakeholders who are frequent users of the existing dashboards. This work is described more fully in the Executive Director's Report (Item 4). Following testing, staff plan to publicly launch the dashboards in advance of the June 2, 2026 election to ensure timely and meaningful access to campaign finance information.

Notification of Contract Submission and Approval Filings Transition to ServiceNow

In January, staff completed the transition of the Notification of Submission of Proposal (SFEC Form 126f2) and Notification of Contract Approval (SFEC Form 126f4) from an internally developed, DocuSign-based filing system to the City's ServiceNow platform, which supports other internal City contract-related workflows.

In addition to maintaining the standard e-filing system for these two forms, which is similar to the systems underlying the Commission's other disclosures, for seven years the Commission also maintained a custom-built workflow to route these filings through the Clerk of the Board and the Mayor's Office and to automate certain manual tasks performed by those departments. The Commission had created and maintained these custom workflows at the request of the Clerk of the Board and Mayor's Office and without a work order. While this custom workflow introduced operational efficiencies for those specific departments, it required ongoing technical support from Commission staff to maintain infrastructure and troubleshoot issues. Over time, this created a sustained operational burden that was not aligned with the Commission's staffing capacity and budget constraints.

Transitioning these workflows to ServiceNow shifts long-term technical responsibility for those custom workflows to the City's centralized IT infrastructure, supports the Commission's FY 2025–26 budget reduction goals, and allows the administrative needs of the Clerk of the Board and the Mayor's Office to be supported through centralized City IT services.

Filers with submissions in progress were notified that filings would need to be completed by February or resubmitted through the new ServiceNow system. Filers with questions about the forms or requirements may continue to seek guidance and advice from Ethics Commission staff. Treasurers of candidate-committees who rely on these filings to comply with the City's contractor contribution restrictions were also notified of the transition and provided guidance on accessing the relevant datasets of contract affiliates.

Web Accessibility & Digital Accessibility Compliance

During this reporting period, EDDA continued efforts to ensure that the Commission's public-facing websites and electronic filing systems comply with applicable accessibility requirements, including the City's Digital Accessibility and Inclusion Standard (DAIS) and the U.S. Department of Justice's web accessibility regulations. City and County of San Francisco public-facing web services must achieve compliance by April 24, 2026.

Accessibility work has included:

- Incorporating WCAG 2.1 Level AA standards into new development projects, including the Campaign Finance Dashboards.

- Conducting automated accessibility audits using WebAIM and similar tools to identify issues.

- Remediating web content that is not in compliance with WCAG standards.

- Reviewing and drafting alternative text descriptions for all images on published pages on the website.

- Coordinating with NetFile to address accessibility gaps in third-party systems.

Staff will continue integrating accessibility considerations into system design, procurement, and development processes to ensure that digital services are usable by all members of the public, including individuals with disabilities.

Technical Assistance Unit (TAU)

During this reporting period, the Technical Assistance Unit (TAU) transitioned from the Engagement and Compliance Division into the EDDA Division. Integrating TAU within EDDA aligns filer support more closely with the electronic systems used by filers and strengthens coordination between user support and system development. This structural change improves feedback loops between filers and technical staff, enables faster identification and resolution of recurring system issues, and supports better coordination during system updates and major filing deadlines.

During the reporting period, TAU resolved 570 support tickets across multiple programs, with an average resolution time of less than one-half business day. The team also created more than 50 internal knowledge base articles for use by Commission staff. This documents standard protocols and steps taken to address common issues.

TAU supported implementation of the transition of SFEC Form 126f2 and SFEC Form 126f4 to the ServiceNow platform by developing updated public-facing guides and workflows for use by City departments. The team also assisted with updates to Commission webpages to support DAIS compliance.

In February, TAU conducted separate training sessions for SEI (Form 700) Department Filing Officers, Designated Filers, and Ethics Filers. The team also issued initial communications to all filers regarding the 2026 annual filing requirements.

Ethics Training Module

EDDA collaborated with the Engagement and Compliance Division to implement a new version of the Commission's Ethics training module, as was reported in the Engagement and Compliance Division report last month. TAU completed extensive testing of the system prior to launch and now fields support requests from users who need additional assistance. The training is integrated directly into the NetFile system used for Form 700 filing. This integration allows users to complete both their ethics training and filing requirements within a single system. The updated training uses a video-based instructional format to improve compatibility across a wide range of devices. It also incorporates interactive quizzes to reinforce understanding.

Internal Process Automations

Internal Procurement Tracker System

During this reporting period, EDDA developed and implemented an internal procurement tracker to improve coordination and oversight of department purchasing activities. Existing Citywide budget and financial systems do not provide visibility into procurement planning and decision-making at the early stages. The new tracker enables staff to monitor procurements from initial concept through contract execution.

The system allows staff to assign responsibility, track status across each phase of the City's purchasing process, maintain supporting documentation, record key milestones, and monitor timelines, dependencies, and approval requirements within a centralized workspace. This tool strengthens internal accountability, improves transparency into procurement progress, and reduces the risk of delays.

Public Financing Approvals

EDDA implemented an automation to support administration of the public financing program. The system monitors qualifying and matching fund requests, automatically notifies auditors when review is required, and generates standardized work plans, individual tasks, and due dates to ensure response times comply with local law.

To further improve efficiency, EDDA established a procedure to automatically verify contributor eligibility for matching funds by cross-referencing public financing requests with the master voter file and local zoning records to confirm San Francisco residency. For example, in a recent request containing 337 individual contributions, auditors automatically verified residency for 306 contributions (90.8 percent). Only 31 contributions required manual confirmation using documentation provided by the committee.

Technology Contracting

The Division is currently engaged in the annual procurement cycle for technology services that support the Commission's electronic filing, web services, training, support portals, and data systems. This requires procuring products from over twenty vendors. Most notably, the Commission's largest technology contract with NetFile expires on June 30, 2026. EDDA is working to ensure continuity of services through timely procurement actions and contract planning.

Staffing Updates & City Budget Impact

As previously reported in recent Executive Director's Reports, in December 2025, Tyler Field (1043 Senior IS Engineer) separated from City service. Alvin Situ was promoted to the 1043 Senior IS Engineer position, creating a vacancy in the division's 1052 IS Analyst position.

The Mayor's Budget Office (MBO) has not authorized filling the vacant 1052 position. As a result, the Division's capacity to maintain and improve the technology systems that support the Commission's regulatory, disclosure, enforcement, and transparency functions is reduced. Sustained staffing constraints increase operational risk and limit the division's ability to respond to legal requirements, cybersecurity threats, and compliance obligations.

EDDA maintains electronic filing systems, public disclosure tools, data services, the Enforcement case management system, the website, advice and support portals, and numerous internal workflows that other divisions depend upon. Without this technical capacity, the Commission would require substantially greater manual staff resources to perform these functions.

If the vacancy remains unfilled, the Division will need to prioritize systems that are legally mandated. Other important but non-mandated tools, including the Campaign Finance Dashboards, may face reduced investment, deferred enhancements, or possible suspension.

In addition, the MBO is evaluating IT classifications citywide for potential reduction or reallocation to centralized services at the Department of Technology. Any further reduction in EDDA staffing capacity, or centralization of these functions without dedicated and specialized support, would significantly increase operational risk and could impair the Commission's ability to carry out its core mandates. EDDA is supporting the Executive Director and Deputy Director in the ongoing budget process to ensure these needs are met.