San Francisco
Ethics Commission

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To: Members of the Ethics Commission

From: Laura Mandler, Engagement and Compliance Manager

Subject: Agenda Item 7: Quarterly Engagement and Compliance Report

This report provides general programmatic updates and data of the Commission's Engagement and Compliance Division. The report includes staffing updates, metrics for the Commission's online support portals, and an update on the disclosure programs and current projects.

No action is required by the Commission, as this item is for informational purposes only.

FY26 Support Portal Data

Engagement and Compliance utilizes online support portals to manage the various support requests fielded by the Division. These requests primarily include troubleshooting technical issues for filers, providing fact-based compliance advice to City officers and employees, and assisting the public in accessing and understanding disclosure filings. The varied responsibilities of the Division necessitate close collaboration, and the use of these portals and a centralized ticketing system have had a positive impact on team efficiency. Below are metrics and charts that summarize the volume and variety of requests managed by Engagement and Compliance.

In total, 2,225 tickets were received through these support portals throughout FY26. The chart below summarizes the number of tickets by portal:

Support Portal Tickets in FY26

Program	Count of Support Tickets by Program
Campaign Finance and Campaign Consultant	256
Ethics Advice	304
Lobbyist	117
Major Developers and Permit Consultants	18
Form 700 and Departmental Gifts	1,530
Grand Total	**2,225**

The Form 700 Statement of Economic Interests program continues to represent the greatest number of support requests, with 1,530 requests resolved by the Technical Assistance Unit (TAU) in the Electronic

Data Disclosure Analysis Division (EDDA) with advice assistance provided by Engagement and Compliance. Additionally, Engagement and Compliance staff handled more than 256 support requests related to the Campaign Finance program.

Average Staff Time to Resolve Requests

Program	Staff Time to Resolve Request (in business days)
Campaign Finance and Campaign Consultant	< ½
Ethics Advice	3
Lobbyist	< ½
Major Developers and Permit Consultants	< ½
Form 700 and Departmental Gifts	< ½

The average staff time to resolve requests in all programs other than Ethics Advice was half a business day or less. Ethics Advice requests, which generally require additional staff time to research the facts of the question asked, had an average time to resolution of 3 business days. This meets the overall Divisional goal of maintaining a time to resolution of less than 4 business days and staff will continue to create resources and streamline processes in an effort to further reduce our average time to resolution in the Ethics Advice program. However, Ethics Advice is the program most heavily impacted by the two compliance positions which were eliminated in the last two budget cycles. The elimination of another compliance position in the latest budget will likely have a detrimental effect on response times and the Staff Time to Resolve Request statistic will continue to be approximately 3 business days or more.

Disclosure Programs

Campaign Finance

Division staff successfully administered the campaign finance program for the June 2026 special election. Staff notified candidates and committees of their filing obligations, answered advice questions from filers, and provided filer support for the five filing deadlines which occurred during the election cycle. 98% of filings were timely filed for the election.

Staff also provided campaign finance training for candidate committees with the support of the Policy division, as well as training for treasurers of primarily formed or general purpose committees. All candidates and committee treasurers are required to receive this training. Each training for candidates and their treasurers also included an optional training segment on the public financing program, which allows candidates for the Board of Supervisors to apply for public funding for their campaigns.

Statement of Economic Interests (Form 700)

Division staff worked closely with the Technical Assistance Unit (TAU) in the Electronic Data Disclosure Analysis Division (EDDA) to prepare filers for the Statement of Economic Interest (Form 700) Annual filing deadline on April 1, 2026. Engagement and Compliance provided advice support to filers and provided legal research or interpretation when necessary for filers to accurately report their financial interests on their Form 700.

FY27 Project Updates

Campaign Finance Training Module

The Division has created an online training module for candidates and committee treasurers to fulfill their training obligations under the Campaign Finance Reform Ordinance. The training has been completed and posted on the Commission’s website. All candidates and all committee treasurers are required to attend a training program by the Ethics Commission within one year prior to any election in which the candidate’s name will appear on the ballot. Staff offered 12 hours of live training over 5 months for the June Special Election candidates and had prepared to offer the same for the November election. However, given the nature of live trainings, staff can only provide a limited amount of trainings throughout the election cycle. The training video will allow candidates and treasurers to access the training at any time, rather than requiring them to attend a live training session. This will also reduce the amount of staff time spent preparing and presenting live trainings throughout the election cycles, which allows the Division to reallocate resources to counter the loss of two compliance positions in the last two budget cycles.

The training covers basic campaign finance rules with an emphasis on local requirements under the Campaign Finance Reform Ordinance. The training also provides a basic overview of the public financing program available to candidates for some City elective offices and provides resources for candidates to access information to help them conduct their campaigns in accordance with both state and local campaign finance rules.

Disclosure Program Manual Conversions

The Division converted PDF manuals describing procedures and rules for disclosure programs into web format to comply with the April 2026 Digital Accessibility and Inclusion Standards (DAIS) deadline.

City policy requires departments to comply with DAIS, which conform to the web content accessibility guidelines required by the U.S. Department of Justice. Under the DAIS requirements, information can no longer exist solely in PDF format due to the format’s limitations related to both mobile browsing and screen reader technology. Engagement and Compliance completed the Candidate manual and Lobbyist manual conversions in April. The Candidate manual describes the campaign finance rules and obligations of candidates for City elective office. The Lobbyist manual describes the reporting requirements and restrictions on lobbyists who receive economic consideration for attempting to influence a local administrative or legislative action. Staff had planned to make substantive improvements within each manual and harmonize the manuals with existing webpages to ensure material is covered thoroughly without duplicative content. However, given the more limited staffing of the division than previously anticipated, only major substantive improvements were made to the Candidate manual, which focuses on campaign finance rules. Other major substantive updates to the materials converted to web format will be targeted in the next fiscal year. All other disclosure program manuals which were available as PDFs on our website were converted by the EDDA division.

Annual Ethics Training Feedback

The Division provided an updated Annual Ethics training module to all officials to complete their required ethics training by the April 1, 2026 deadline. As reported in the previous quarterly updates, the training was shortened and modified from previous years based on feedback from users on the functionality, format, and content of the training. The subject matter of the examples and scenarios were informed by questions submitted by officials through the Ethics Advice Portal in the previous year.

Feedback received from users since the launch has reflected positive user experiences. Users indicated the new format of the training was a dramatic improvement, and they appreciated how the training was segmented with links to relevant rules after each section. Other users mentioned the examples and illustrations were very common sense and relatable, while others reported they would have liked more examples in the training. Users have reported an increase in their knowledge of ethics rules after taking the training: Prior to the training, only 43% of survey respondents reported being extremely or very knowledgeable about ethics rules which increased to 79% after completion of the training.