



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.

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, 550 tickets were received through these support portals from January 1, 2026 through September 3, 2026. The chart below summarizes the number of tickets by portal:

Support Portal Tickets in Calendar Year 2026

Program	Count of Support Tickets by Program
Campaign Finance and Campaign Consultant	219
Ethics Advice	209
Lobbyist	81
Major Developers and Permit Consultants	12
Form 700 and Departmental Gifts Advice	29
Grand Total	550

This chart reflects a departure from total support ticket charts included in previous quarterly reports. All support tickets related to the Form 700 Statement of Economic Interests program were previously incorporated. However, since the majority of the Form 700 tickets are technical support tickets resolved by the Technical Assistance Unit (TAU) in the Electronic Data Disclosure Analysis Division (EDDA), the technical support tickets have been removed from this dataset. However, the Engagement and

Compliance division provides advice assistance to Form 700 filers, including legal research or interpretation when necessary to assist these filers with the accurate reporting of their financial interests, and support TAU in the determination of filing requirements of filers. The total included here reflects the advice support ticket resolved by Engagement and Compliance staff for this program.

Additionally, Engagement and Compliance staff handled more than 219 support requests related to the Campaign Finance program, which likely will surpass the last calendar year's total of 271. This reflects the increase in support tickets from candidates and committees during an election year. This number also includes support tickets for advice provided to candidates and their committees related to the public financing program and the campaign consultant program.

Time to Resolution of Support Portal Tickets in Calendar Year 2026

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.

The Division has adjusted a previously set overall Divisional goal of maintaining a time to resolution of four days to three days. This change reflects that in the past year, Ethics Advice tickets have generally averaged three days to resolution rather than the target of four. As the division was outpacing the goal, staff adjusted this timing to better reflect the current standard. Ethics Advice is the program which has been most heavily impacted by the two compliance positions which were eliminated in the last two budget. However, even with reduced staffing, Division staff have been able to keep the pace of the previous year even with the elimination of these two compliance positions.

Disclosure Programs

Campaign Finance Program

Commission staff is preparing for upcoming implementation of the Cal-Access Replacement System (CARS). Cal-Access, and its replacement CARS, are the State's public website platforms for providing campaign disclosure data to the public to keep track of political contributions and spending on the state level, similar to our local campaign finance statement portal. The new system seeks to emphasize the data reported by filers, in contrast to the current system which emphasizes campaign forms submitted by filers and compartmentalizes all data within those individual forms. The new system, developed by

the Secretary of State, will go live on November 11, 2026. Engagement and Compliance division staff, as well as EDDA and Policy division staff, will participate in external stakeholder user testing of the CARS system in September and October in order to become familiar with the system prior to the launch, as well as provide feedback to the Secretary of State's office on system functionality.

Changes to the State's Political Reform Act conditioned on the launch of CARS, specifically related to committee filing campaign reports, will be operationalized in November as well. Engagement and Compliance staff will identify relevant educational and compliance materials which will be impacted by these changes, make relevant changes to the materials, and keep candidates and committee treasurers informed about any possible changes that will have an effect on filings for their committees.