San Francisco
Ethics Commission

25 Van Ness Avenue, STE 220
San Francisco, CA 94102-6053
ethics.commission@sfgov.org
415-252-3100 | sfethics.org

Date: November 6, 2026

To: Members of the Ethics Commission

From: Steven Massey, Director of Technology Services

Subject: Agenda Item 5: Quarterly 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 July 2026 through October 2026. Because the October 9, 2026, Commission meeting was canceled, this report has been updated to include activities that occurred during October. Key activities during this period included maintaining and enhancing the Commission's Campaign Dashboards and providing training for local journalists; preparing for website and email domain transitions; evaluating and developing artificial intelligence tools to support Commission operations; implementing Single Sign-On for City users of the Netfile electronic filing system; participating in testing of the California Secretary of State's CAL-ACCESS Replacement System (CARS) and identifying issues affecting local filing operations; and analyzing technical support requests to identify opportunities to reduce recurring support needs. No action is required by the Commission, as this item is for informational purposes only.

Campaign Dashboards and Journalist Training

The Commission's Campaign Dashboards provide the public with accessible summaries of campaign finance activity involving candidates, ballot measures, and committees and allow users to navigate from high-level election information to more detailed campaign finance disclosures. EDDA staff continued to maintain the dashboards through the November 3, 2026, election.

As new types of campaign activity and disclosure scenarios arise, staff evaluate how that activity should be categorized and presented so that the dashboards accurately reflect the underlying campaign finance information. EDDA also continued to collaborate with the Policy Division to respond to questions from the public about data presented in the dashboards.

During the election period, newly filed campaign finance data required daily review. EDDA staff refreshed the data and reviewed the resulting dashboard information before publication to help ensure that it was accurate and presented appropriately. Staff continued this daily review through the November election. Following the election, staff will continue monitoring post-election filings, with a final planned update following the second semiannual campaign statement filing period in early 2027.

On August 20, Alvin Situ and I joined Ryan Abusaa and Michael Canning of the Policy Division in providing training at an event hosted by the Society of Professional Journalists NorCal at the offices of

the San Francisco Standard. The training was designed to help journalists learn how to use the dashboards to explore who funds San Francisco elections.

Mr. Abusaa provided an overview of applicable state and local campaign finance requirements. I demonstrated the Campaign Dashboards and discussed how journalists can use the dashboards and the Commission's underlying campaign finance data to research candidates, ballot measures, committees, contributions, expenditures, and third-party spending. Staff also responded to questions from participating journalists about how to locate and interpret campaign finance information.

Website and Email Domain Transition

EDDA staff have also been preparing for changes to the Commission's public website domains to comply with AB 1637 (2023). In accordance with the Committee on Information Technology (COIT) Domain Registration and Management Policy, staff requested and received approval from Digital and Data Services (DDS) to migrate the Commission's primary website from sfethics.org to ethics.sf.gov and the Campaign Dashboards from campaign.sfethics.org to campaign.ethics.sf.gov. The planned transition also prompted legislation considered by the Commission at its September meeting to update campaign disclaimer requirements that reference the Commission's existing website address. Staff plan to complete the domain transition in 2027.

Separately, City departments have been directed to transition departmental website content to the sf.gov website and discontinue independently operated departmental websites. DDS approved the Ethics Commission's request to continue operating its existing website and content rather than migrating that content to the sf.gov website platform.

In October, DDS provided design assistance to help bring the Commission's website and Campaign Dashboards into closer alignment with the visual design of sf.gov and provide a more consistent experience across the sites. Staff plan to launch the design updates in the coming weeks.

Commissioner and staff email addresses will also transition from sfgov.org to sf.gov. EDDA staff are working with the Department of Technology to prepare for the transition and identify any required changes to Commission systems and processes. One significant impact will be on the Netfile Single Sign-On implementation, as discussed below.

EDDA will continue planning and implementing the website and email domain transitions, including updates to links, applications, integrations, and other systems that currently reference the existing sfethics.org and sfgov.org domains.

Artificial Intelligence Projects

EDDA staff are participating in a pilot project offered by the Department of Technology that provides access to artificial intelligence tools that can assist with software development and analyze or process data supplied by applications. Participation in the pilot provides EDDA with an opportunity to evaluate how these tools could be incorporated into Commission operations.

One area of ongoing work is the development of AI-powered knowledge agents intended to help Commission staff more efficiently retrieve and analyze information for compliance and legal research.

These tools are being explored as a way to search relevant laws, regulations, guidance, prior Commission materials, and other information and produce analysis that staff can review and verify.

EDDA is also exploring additional uses of AI and automation to support the Commission's work. These include tools that could assist Audit and Enforcement staff with reviewing and extracting information from large collections of records and tools that could assist with the preparation of draft Commission meeting minutes from meeting recordings and transcripts.

Staff will continue evaluating these technologies and identifying areas where they can reduce repetitive work, improve access to information, and allow staff to devote more time to review, analysis, and other higher-value activities.

Netfile Single Sign-On

The Commission's most recent contract with Netfile requires the vendor to implement single sign-on (SSO) for users of its electronic filing systems. During the reporting period, EDDA worked with Netfile and the Department of Technology to integrate Netfile's authentication system with the City's SSO infrastructure.

SSO allows users to authenticate to Netfile using the same City credentials they use for other City systems rather than maintaining a separate Netfile password. In addition to simplifying the login process, this allows City users to rely on the City's centralized authentication system and password management practices.

On September 30, Netfile SSO was implemented for users who access applicable Netfile systems using an email address associated with a City domain. This includes Form 700 filers, departmental filing officers, and other City personnel who use Netfile's administrative functions.

Form 700 filers who use personal or other non-City email addresses will continue to authenticate using their existing Netfile credentials rather than City SSO. This typically includes commissioners who do not have department-issued email addresses, filers with assuming-office filing requirements who have not yet received a City email address, and filers who have left City service and no longer have access to a City email address but are still required to file a leaving-office statement.

EDDA staff notified affected users of the change and will continue working with Netfile and the Department of Technology to address implementation issues and support users during the transition.

The transition from sfgov.org to sf.gov email addresses will also affect Netfile SSO. As City officers and employees transition to sf.gov email addresses, their Netfile accounts will need to be updated so they can continue to authenticate using City SSO. For departments that use their own email domains, Netfile can update all affected users in bulk. For departments that currently use the sfgov.org domain, however, user accounts will need to be updated individually by the Technical Assistance Unit (TAU) as departments transition to sf.gov over the next two to three years. EDDA staff anticipate that this transition will impact thousands of filers. EDDA staff are contacting departmental IT staff to understand their planned migration schedules and coordinate the corresponding Netfile account changes.

CAL-ACCESS Replacement System Testing

During the reporting period, EDDA staff participated in stakeholder meetings and user testing for the California Secretary of State's CAL-ACCESS Replacement System (CARS), which will replace the state's existing campaign finance filing system. EDDA collaborated with staff from the Policy Division and Engagement and Compliance Division to test the system and evaluate how the transition could affect the Commission's responsibilities as a local campaign finance filing officer.

Through this testing, staff identified several significant gaps and unresolved issues affecting local filing agencies. These included questions about access to complete committee registration information, coordination between state and local filing requirements and electronic filing systems, differences between state and local campaign finance reporting formats, and the availability of technical support and reliable system integrations. Commission staff raised some of these concerns during CARS user feedback sessions and are continuing to evaluate the remaining issues and their potential impacts on local filing operations.

The Secretary of State's office announced on October 29, 2026, that the launch of the new system was postponed from November 16, 2026, to February 16, 2027. This postponement provides additional time for the outstanding issues identified through testing to be addressed.

Technical Support Requests and Analysis

During the period of July 2026 through October 2026, the TAU resolved 388 support tickets. Staff also analyzed support tickets resolved during FY26 to identify the highest-volume ticket categories, recurring trends, and likely causes. Based on this analysis, staff identified technical system changes, business process improvements, filer-facing guidance, training materials, staff workflow changes, and other corrective actions that could reduce or eliminate preventable recurring support requests. For example, assistance with Netfile password resets was identified as a frequent support topic. The implementation of Netfile Single Sign-On is expected to reduce these requests by allowing City users to authenticate using their existing City credentials rather than maintaining a separate Netfile password. Staff are continuing to implement other corrective actions identified through the analysis.