CITY OF SAN DIEGO

ORGANIZATION LOBBYIST QUARTERLY DISCLOSURE REPORT

[Form EC-604]

INTRODUCTION

The Quarterly Disclosure Report is used to disclose an organization lobbyist's lobbying during the reporting period, its activity expenses, and the campaign contributions, campaign fundraising activities, campaign-related services, and City contracts associated with the owners, compensated officers, or lobbyists in the organization. An "organization lobbyist" is any business or organization, including a non-profit entity, that has reached the "10 lobbying contacts in 60 days" threshold under the City's Lobbying Ordinance.

File one Report to cover the activities of the entire organization. Individual lobbyists do not file separate statements. All information relevant to the individual lobbyists should be contained within the organization's report.

The reporting period is one of the following calendar quarters: January through March; April through June; July through September; and October through December. The report must be filed no later than the end of the month following the quarter. For example, the deadline for the April-June quarterly report is the last day of July. **A quarterly report must be filed even if the organization did not lobby any City Officials during the quarter.**

This form is available from the City Clerk. Electronic versions are available on the City Clerk's website: www.sandiego.gov/city-clerk/elections/lobby/forms.shtml

You may type or print on the form. If printing, use blue or black ink. If using the electronic version of the form, note that you can type on the form with your computer, but you cannot save the information you enter unless you have the full version of Adobe Acrobat.

When you file this report, include only the cover sheet and the schedules that contain the organization's disclosures. Do not file the instruction sheets or any schedules on which the organization has nothing to report.

Do not use this form to add or delete lobbyists. Amend your Registration Form to make such changes.

File the original completed and signed form with the City Clerk.

COMPLETING THE FORM

Cover Sheet

- Identify the reporting period in the upper left-hand portion of the form. Example:

  Period Covered:
  From 1/1/10
  To 3/31/10

- If the report is an amendment, check the applicable box and describe the reason for amending. You must file an amendment within ten calendar days of discovering inaccurate or incomplete information on the report.
- If you are terminating your organization's status as an "organization lobbyist," check the applicable box. An organization may terminate when it has ceased lobbying City Officials. Report all activity since the organization's last Quarterly Disclosure Report. Include activity up to the date of termination (i.e., the "To" date identified in the upper left-hand section of the cover sheet).
- Identify the name, address, and telephone number of the organization. Check a "Yes" box or "No" box to identify which schedules are, or are not, included in your report. You must check one box for each schedule listed (for an amendment, check only the boxes relating to the amendment). When filing the report, attach all schedules for which the organization has information to disclose. Do not attach schedules for which the organization has nothing to disclose. For more information, refer to the instructions for each schedule.
- After completing the report, identify the total number of pages you are submitting. Count the cover sheet and all of the attached schedules. Do not count (and do not file) any of the instruction sheets or any schedules that are blank.
- A duly authorized owner or officer of the organization must complete the verification at bottom of the cover sheet to attest to the accuracy of the information disclosed on the report.

Period Covered:
From ___________
To _____________

CITY OF SAN DIEGO

ORGANIZATION LOBBYIST QUARTERLY DISCLOSURE REPORT
[Form EC-604]

For Official Use Only

Total # of Pages: ______

☐ Check Box if an Amendment (explain: ____________________________
____)

☐ Check Box if Terminating Status as Organization Lobbyist (see instructions)

Identify the Name of the Organization.

_______________________________________ Name of Organization

_______________________ Telephone Number

_______________________ Business Address (Number & Street) ______________ (City) ____ (State) ______ (Zip)

Check box (and attach schedule) if the organization has activity to report on this schedule for the reporting period.

Check box (do not attach schedule) if the organization has no activity to report on this schedule for the reporting period.

YES	NO	**You MUST check one box for each schedule.**
☐	☐	**Schedule A: City Decisions.** Decisions sought to be influenced during the reporting period
☐	☐	**Schedule B: Activity Expenses.** Activity expenses made during the reporting period
☐	☐	**Schedule C: Candidate Contributions.** Contributions of $100 or more made to a City candidate by owners, compensated officers, and lobbyists of the organization during the reporting period
☐	☐	**Schedule D: Ballot Measure Contributions.** Contributions of $100 or more made by owners, compensated officers, and lobbyists of the organization during the reporting period to a City candidate-controlled ballot measure committee
☐	☐	**Schedule E: Fundraising Activities.** Fundraising activities by owners, compensated officers, and lobbyists of the organization in the amount of $2,000 or more during the reporting period
☐	☐	**Schedule F: Campaign Services.** Paid campaign-related services personally provided by owners, compensated officers, and lobbyists of the organization during the reporting period
☐	☐	**Schedule G: City Contract Services.** Paid services personally provided by owners, compensated officers, and lobbyists of the organization under a City contract during the reporting period

VERIFICATION

I have been authorized by the Organization Lobbyist identified above to make this verification. I have exercised reasonable diligence in the course of reviewing this Quarterly Disclosure Report for completeness and accuracy. I declare under penalty of perjury under the laws of the State of California that the contents of this Quarterly Disclosure Report, including all attached schedules, are true, correct, and complete, except as to those matters which are stated on information and belief, and as to those matters I believe them to be true.

Executed on ______________________ (Date) at ______________________________ (City and State)

By: ______________________ (Signature) ______________________ (Print Name) ______________________ (Title)

Instructions for Schedule A: City Decisions

Complete this schedule if your organization lobbied any City Officials during the reporting period. Your organization is "lobbying" when one of its owners, compensated officers, or employees has a direct communication (e.g., meeting, telephone call, letter, or e-mail) with a City Official for the purpose of influencing a municipal decision on behalf of the organization.

Completing the Form:

- Identify the organization's name at the top of each schedule.
- Fill out a separate schedule for each municipal decision for which the organization lobbied the City during the reporting period.
- Each Schedule A sheet contains space for reporting information regarding one municipal decision. Attach as many continuation sheets as are necessary to report all the municipal decisions the organization sought to influence during the reporting period.
- Identify the specific municipal decision (e.g. land development permit for Parcel XYZ, banning alcohol on City beaches) and the outcome sought by the organization (e.g., approve the permit, adopt the ban). Note that vague, general descriptions such as "land use matter" and "property development" are not acceptable. This information should correspond to the information provided on the organization's Registration Form."
- Identify the outcome sought by the organization (e.g., approve the permit; adopt the ban); it must be consistent with the outcome identified on the organization's Registration Form.
- Identify the names of each owner, compensated officer, and employee in the organization who lobbied City Officials with regard to this decision during the reporting period.
  - ✓ Do not include the names of any uncompensated officers or other volunteers of the organization.
  - ✓ Each person identified should have been listed on the organization's Registration Form (Form EC-602). If not, an amendment to the Registration Form is required.
- Identify the names and departments of each City Official lobbied (see position list below).
  - ✓ Do not include the names of City Officials whom you addressed only at public meetings held in accordance with the Brown Act. Do not include the names of City employees who are not "City Officials."
  - ✓ Note that some City Officials use a working title that is different from their official title. Check the Ethics Commission website for a list of unclassified City Officials and their official titles.
- State the total number of lobbying "contacts" the organization made during the reporting period regarding this decision.
  - ✓ For example, if the organization's employees had four private meetings with a City Official concerning the amendment of land use permit, and sent that official two letters on the matter, report six contacts. See the Ethics Commission's *Fact Sheet: "Am I a Lobbyist?"* for more information concerning the "contacts" rules.
  - ✓ Do not include contacts by uncompensated officers or other volunteers of the organization.
- Do not include decisions the organization attempted to influence solely through "indirect" lobbying efforts, such as public relations and advertising. If the organization spent $5,000 or more in a calendar quarter for such efforts, it is also an "Expenditure Lobbyist," and should report those payments on an Expenditure Lobbyist Quarterly Disclosure Report. See the Expenditure Lobbyist disclosure forms and fact sheets for more information.
- Check the box at the bottom of the page if you have additional information to report (i.e., more municipal decisions the organization sought to influence), and disclose that information on a continuation sheet (i.e., another copy of the "City Decisions" schedule). Identify the organization's name at the top of each continuation sheet.

> ***Note:*** A list of "City Official" positions may be found in the Lobbying Ordinance under the definition of "City Official" and in the Ethics Commission's *Fact Sheet: Am I a Lobbyist?* These documents are located on the Ethics Commission's website, as are regularly updated lists of the individuals occupying these positions.

SCHEDULE A: CITY DECISIONS

Name of Organization: ____

Fill out a separate sheet for EACH municipal decision for which the organization lobbied the City of San Diego during the reporting period.

MUNICIPAL DECISION (BE SPECIFIC): ____

____

A. Outcome Sought: ____

____

B. Name of each owner, compensated officer, and employee in the organization who lobbied City Officials with regard to this municipal decision:

______________________ ______________________

______________________ ______________________

______________________ ______________________

______________________ ______________________

C. Name and Department of each City Official lobbied:

Name: ______________________ Department: ______________________

Name: ______________________ Department: ______________________

Name: ______________________ Department: ______________________

Name: ______________________ Department: ______________________

Name: ______________________ Department: ______________________

Name: ______________________ Department: ______________________

Name: ______________________ Department: ______________________

Name: ______________________ Department: ______________________

Name: ______________________ Department: ______________________

Name: ______________________ Department: ______________________

Name: ______________________ Department: ______________________

Name: ______________________ Department: ______________________

Name: ______________________ Department: ______________________

Name: ______________________ Department: ______________________

D. Total number of lobbying “contacts” made by the organization’s owners, compensated officers, and employees during the reporting period concerning this municipal decision: _______

Comments: ____

☐ If more space is needed, check box and attach continuation sheet(s).

Clear Page

Instructions for Schedule B: Activity Expenses

Complete and attach this schedule only if the organization or its lobbyists made activity expenses during the reporting period. If no such activity expenses were made, check the applicable box on the cover sheet, and do not attach Schedule B.

An "activity expense" means any payment made to, or on behalf of, any City Official or any member of a City Official's immediate family, by a lobbyist, lobbying firm, or organization lobbyist. Activity expenses include gifts, meals, consulting fees, salaries, and any other form of compensation to a City Official or a City Official's immediate family, but do not include campaign contributions. For example, a $3,000 consulting fee paid to a Department Director's spouse would be considered a reportable activity expense.

Completing the form:

- Identify the organization's name at the top of each schedule.
- Identify each activity expense made during the reporting period that exceeds $10 on any single occasion.
- For each activity expense identified, be sure to disclose:
  - ✓ the date of the expense;
  - ✓ a description of the expense (e.g., "consulting fees paid to John Smith");
  - ✓ the name, title, and department of the City Official who benefited (or whose immediate family benefited) from the activity expense;
  - ✓ the name of each lobbyist in the organization who participated in making the activity expense;
  - ✓ the name and address of the payee of the activity expense; and,
  - ✓ the amount of the expense.
- Attach as many continuation sheets as are necessary to report all the activity expenses the organization made during the reporting period.
- Check the box at the bottom of the page if attaching an additional continuation sheet. Be sure to identify the name of the organization on the top of each continuation sheet.

Note: City law limits gifts (e.g., meals, tickets to events) from an organization lobbyist and its lobbyists to $10 per City Official within a calendar month. This means that if a lobbyist in your organization purchases an $8 lunch for a particular City Official, neither the organization nor any of its lobbyists may purchase a $3 beverage for that official in the same calendar month. Because the Activity Expenses schedule only requires the reporting of activity expenses that exceed $10, your organization should have no gifts to report.

Note: Tickets and invitations to events held for non-profit entities (e.g., the Chamber of Commerce, Father Joe's Villages) are not considered "gifts" for purposes of the Lobbying Ordinance. Accordingly, they are not subject to the $10 limit and need not be reported on the Quarterly Report Form. Note, however, that such tickets and invitations may be considered "gifts" under the City's Ethics Ordinance and could subject the recipient to that Ordinance's gift limits, reporting requirements, and disqualification rules.

SCHEDULE B: ACTIVITY EXPENSES

Name of Organization: ____

Fill out a separate entry for EACH activity expense of more than $10 made by the organization or its lobbyists to benefit a City Official, or his or her immediate family, during the reporting period.

Date of activity expense: ________________ Amount of activity expense: $____________

Description of expense: ____

Name, title, and department of City Official who benefited (or whose immediate family benefited) from the activity expense: ____

Name of each lobbyist in the organization who participated in making the activity expense:

________________ ________________ ________________

Name and address of the payee of the activity expense: ______________________________

____

Date of activity expense: ________________ Amount of activity expense: $____________

Description of expense: ____

Name, title, and department of City Official who benefited (or whose immediate family benefited) from the activity expense: ____

Name of each lobbyist in the organization who participated in making the activity expense:

________________ ________________ ________________

Name and address of the payee of the activity expense: ______________________________

____

Date of activity expense: ________________ Amount of activity expense: $____________

Description of expense: ____

Name, title, and department of City Official who benefited (or whose immediate family benefited) from the activity expense: ____

Name of each lobbyist in the organization who participated in making the activity expense:

________________ ________________ ________________

Name and address of the payee of the activity expense: ______________________________

____

Comments: ____

☐ If more space is needed, check box and attach continuation sheet(s).

Clear Page

Instructions for Schedule C: Campaign Disclosures – City Candidates

Complete and attach this schedule only if one or more of the organization's owners, compensated officers, or lobbyists made contributions with an aggregate total of $100 or more during the reporting period to a candidate for City office. Note that elected City Officials (the Mayor, City Councilmembers, and the City Attorney) are considered "candidates" under campaign laws for as long as they remain in office, and are also "candidates" for purposes of this schedule. If no such contributions were made, check the applicable box on the cover sheet, and do not attach Schedule C.

Completing the form:

- Identify the organization's name at the top of each schedule.
- For each contribution made by an owner, compensated officer, or lobbyist of the organization during the reporting period, state:
  - ✓ the name of the owner, compensated officer, or lobbyist;
  - ✓ the name of the candidate supported;
  - ✓ the date of the contribution; and
  - ✓ the amount of the contribution.
- Only contributions from an individual with an aggregate total of $100 or more in the quarter must be disclosed. A lobbyist who made a $75 contribution to a candidate does not need to disclose that contribution on Schedule C unless he or she made another contribution of $25 or more to the candidate in the same quarter.
- If the individual made multiple contributions during the quarter, report each contribution separately on Schedule C.
- Do not use Schedule C to report contributions made to support a candidate-controlled ballot measure committee; use Schedule D instead.
- Attach as many continuation sheets as are necessary to disclose all reportable contributions made by the organization's owners, compensated officers, and lobbyists during the reporting period.
- Check the box at the bottom of the page if attaching an additional continuation sheet. Be sure to identify the name of the organization on the top of each continuation sheet.

For example: Jane is an organization lobbyist's President. In October, she writes a personal check for $250 and gives it to a candidate seeking office in an upcoming City election. When the organization prepares its October-December disclosure report, it must identify the $250 contribution, including Jane's name, the date and amount of the contribution, and the name of the candidate.

For example: After Councilmember Lopez is sworn into office, she sends out mailers soliciting contributions to retire her campaign debt. Richard is the owner of a company that qualifies as an organization lobbyist. He sends a personal check for $150 to Councilmember Lopez. Even though the Councilmember is now an officeholder, she is also still a "candidate," and Richard's company must disclose the $150 contribution on its next quarterly disclosure report.

Note: The term "candidate" includes an elected City official running for office in a different jurisdiction. For example, a City Councilmember running for State Assembly is a "candidate" for purposes of these disclosure rules.

Note: The term "contribution" includes non-monetary, or "in-kind" payments. For example, a lobbyist who provides a candidate with $100 worth of office supplies has made a contribution that must be reported on Schedule C.

Note: A "contribution" also includes a payment made to a candidate's or officeholder's "professional expense fund," i.e., legal defense fund.

SCHEDULE C: CAMPAIGN DISCLOSURE – CITY CANDIDATES

Name of Organization: ____

Fill out a separate entry for EACH contribution made by an owner, compensated officer, or lobbyist of the organization who contributed $100 or more during the reporting period to a City candidate committee. (Do not use this schedule to report contributions made to a candidate-controlled ballot measure committee; use Schedule D instead.)

Name of individual making the contribution: ____

Name of candidate supported: ____

Date contribution made: ___________________________ Amount of contribution: $____________________

Name of individual making the contribution: ____

Name of candidate supported: ____

Date contribution made: ___________________________ Amount of contribution: $____________________

Name of individual making the contribution: ____

Name of candidate supported: ____

Date contribution made: ___________________________ Amount of contribution: $____________________

Name of individual making the contribution: ____

Name of candidate supported: ____

Date contribution made: ___________________________ Amount of contribution: $____________________

Name of individual making the contribution: ____

Name of candidate supported: ____

Date contribution made: ___________________________ Amount of contribution: $____________________

Name of individual making the contribution: ____

Name of candidate supported: ____

Date contribution made: ___________________________ Amount of contribution: $____________________

Comments: ____

☐ If more space is needed, check box and attach continuation sheet(s).

Clear Page

Instructions for Schedule D: Campaign Disclosures – Candidate Controlled Ballot Measure Committees

Complete and attach this schedule only if the organization or any one of its owners, compensated officers, or lobbyists made contributions totaling $100 or more during the reporting period to a City ballot measure committee controlled by a City candidate. Note that elected City Officials (the Mayor, City Councilmembers, and the City Attorney) are considered "candidates" under campaign laws for as long as they remain in office, and are also "candidates" for purposes of this schedule. If no such contributions were made, check the applicable box on the cover sheet, and do not attach Schedule D.

It is not difficult to determine if a candidate "controls" a ballot measure committee. Under the City's campaign laws, when a candidate "controls" a committee, that candidate's name must appear on all of the committee's mass-distributed campaign literature, including its door hangers, mailers, and yard signs.

Completing the form:

- Identify the organization's name at the top of each schedule.
- For each contribution made by the organization or any of its owners, compensated officers, or lobbyists during the reporting period, state:
  - ✓ the name of the organization (if the contribution was made in the organization's name) or the name of the owner, compensated officer, or lobbyist who made the contribution;
  - ✓ the date of the contribution;
  - ✓ the amount of the contribution;
  - ✓ the name of the committee; and,
  - ✓ the name of the candidate controlling the committee.
- Only contributions from a single source with an aggregate total of $100 or more in the quarter must be disclosed. A lobbyist who made a $75 contribution to a candidate-controlled committee does not need to disclose that contribution on Schedule D unless he or she made another contribution of $25 or more to the committee in the same quarter.
- If the organization or individual made multiple contributions during the quarter, report each contribution separately on Schedule D.
- Do not use Schedule D to report contributions made to support a candidate seeking elective office; use Schedule C instead.
- Attach as many continuation sheets as are necessary to disclose all reportable contributions made by the organization and its owners, compensated officers, and lobbyists during the reporting period.
- Check the box at the bottom of the page if attaching an additional continuation sheet. Be sure to identify the name of the organization on the top of each continuation sheet.

For example: Oscar works as a lobbyist for a company that qualifies as an organization lobbyist. In August, he writes a personal check for $500 to support a City ballot measure opposing an increase in the City's transient occupancy tax. He gives the check to a ballot measure committee called "Citizens Against Higher Taxes." That committee is controlled by Councilmember Smith. (Oscar knows that Smith controls the committee because the City's campaign laws require the Councilmember's name to appear on all of the committee's mass-distributed campaign literature, including its door hangers and mailers.) That same month, the company Oscar works for writes a check for $3,000 and gives it to "Citizens for a Better City," a committee that supports the same ballot measure, but is not controlled by a candidate.

When the company prepares its July-September disclosure report, it must identify Oscar's $500 contribution, along with the date it was made, the amount, the name of the committee, and Councilmember Smith's name. The $3,000 contribution made by Oscar's company does not need to be disclosed because its contribution went to a committee that is not controlled by a candidate.

SCHEDULE D: CAMPAIGN DISCLOSURES – CANDIDATE CONTROLLED BALLOT MEASURE COMMITTEES

Name of Organization: ____________________

Fill out a separate entry for EACH contribution made by the organization or any of its owners, compensated officers, or lobbyists who contributed $100 or more during the reporting period to a City ballot measure committee controlled by a City candidate or officeholder. (Do not use this schedule to report contributions made to support a candidate seeking elective office; use Schedule C instead.)

Name of organization/person making the contribution: ____________________

Name of committee: ____________________

Name of candidate controlling the committee: ____________________

Date contribution made: ____________________ Amount of contribution: $____________________

Name of organization/person making the contribution: ____________________

Name of committee: ____________________

Name of candidate controlling the committee: ____________________

Date contribution made: ____________________ Amount of contribution: $____________________

Name of organization/person making the contribution: ____________________

Name of committee: ____________________

Name of candidate controlling the committee: ____________________

Date contribution made: ____________________ Amount of contribution: $____________________

Name of organization/person making the contribution: ____________________

Name of committee: ____________________

Name of candidate controlling the committee: ____________________

Date contribution made: ____________________ Amount of contribution: $____________________

Name of organization/person making the contribution: ____________________

Name of committee: ____________________

Name of candidate controlling the committee: ____________________

Date contribution made: ____________________ Amount of contribution: $____________________

Comments: ____________________

☐ If more space is needed, check box and attach continuation sheet(s).

Clear Page

Instructions for Schedule E: Fundraising Activities

Complete and attach this schedule only if one or more of the organization's owners, compensated officers, or lobbyists engaged in "fundraising activities" with an aggregate total of $2,000 or more during the reporting period for a candidate for City office or for a ballot measure committee controlled by a candidate. If no such fundraising activity took place, check the applicable box on the cover sheet, and do not attach Schedule E.

"Fundraising activity" mean soliciting, or directing others to solicit, campaign contributions from one or more contributors, either personally or by hosting or sponsoring a fundraising event, and either: (1) personally delivering $2,000 or more in contributions to a candidate or a candidate's controlled committee, or (2) identifying oneself to a candidate or a candidate's controlled committee as having any degree of responsibility for $2,000 or more in contributions received as a result of that solicitation.

Completing the form:

- Identify the organization's name at the top of each schedule.
- If an owner, compensated officer, or lobbyist helped fundraise $2,000 or more for a candidate during the period:
  - ✓ fill out a separate entry for each instance in the period where that person engaged in fundraising activities.
  - ✓ disclose each of that person's fundraising efforts, even if a specific instance of fundraising didn't meet the $2,000 threshold or if different dates or events were involved. For example, report both an April fundraiser that raised $1,600 and a June fundraiser that raised $400 for the same candidate.
- For each instance of fundraising activity, state:
  - ✓ a brief description of the fundraising activity (e.g., "hosted a fundraiser" or "mailed solicitation letters to 20 business associates");
  - ✓ the name of the owner, compensated officer, or lobbyist who engaged in the fundraising activity;
  - ✓ the name of the candidate who benefited, or whose committee benefited, from the fundraising activity;
  - ✓ a description of any applicable ballot measure;
  - ✓ the date(s) of the fundraising activity (e.g., the date a fundraiser was held, the week that contribution solicitations were mailed); and,
  - ✓ the total amount of contributions raised through the fundraising effort. Identify the total amount that an owner, compensated officer, or lobbyist helped raise, even if that individual was one of several persons involved in the effort. Do not reduce this amount on the basis of anyone's proportionate involvement.
- Attach as many continuation sheets as are necessary to report all such fundraising activities by the owners, compensated officers, and lobbyists in the organization during the reporting period.
- Check the box at the bottom of the page if attaching an additional continuation sheet. Be sure to identify the name of the organization on the top of each continuation sheet.

For example: Mary owns a company that employs two lobbyists, John and Bill. Candidate Smith asks Mary, John, and Bill to help raise money for his City Council election campaign. Candidate Smith gives each of them a stack of remittance envelopes and asks them to help raise money for his campaign.

- ➢ Mary hosts a fundraiser at her house, collects $5,500 in contribution checks, and delivers them to Candidate Smith.
- ➢ John writes his name on a corner of each envelope and mails them to a dozen of his associates, asking them to place a contribution in the envelope and send it to the candidate. John later finds out (through his associates or the candidate) that those associates contributed a total of $2,000 to Candidate Smith.
- ➢ Bill calls ten of his friends and encourages them to go to Mary's fundraiser. He takes no further action.

When the company prepares its quarterly disclosure report, it must identify Mary's and John's fundraising activities. Both solicited contributions and made sure the candidate knew they were responsible for more than $2,000 in contributions. Bill's fundraising activities do not need to be disclosed – even though he solicited his friends on behalf of Candidate Smith, he never obtained any credit for contributions that might have resulted from his solicitations.

Note: The term "candidate" includes an elected City official running for office in a different jurisdiction. For example, a City Councilmember running for State Assembly is a "candidate" for purposes of these disclosure rules.

SCHEDULE E: FUNDRAISING ACTIVITIES

Name of Organization: ____

Fill out a separate entry for EACH instance in the reporting period where an owner, compensated officer, or lobbyist of the organization engaged in fundraising activities (if that individual has reached the $2,000 threshold):

Description of fundraising activity: ____

____

Name of individual in organization who engaged in fundraising activity: ____________________

Name of candidate/official benefiting from fundraising: ____________________

Description of ballot measure (if applicable): ____________________

Date(s) of fundraising activity: ____________________

Approximate total amount raised (do not divide by number of persons involved): $____________________

Description of fundraising activity: ____

____

Name of individual in organization who engaged in fundraising activity: ____________________

Name of candidate/official benefiting from fundraising: ____________________

Description of ballot measure (if applicable): ____________________

Date(s) of fundraising activity: ____________________

Approximate total amount raised (do not divide by number of persons involved): $____________________

Description of fundraising activity: ____

____

Name of individual in organization who engaged in fundraising activity: ____________________

Name of candidate/official benefiting from fundraising: ____________________

Description of ballot measure (if applicable): ____________________

Date(s) of fundraising activity: ____________________

Approximate total amount raised (do not divide by number of persons involved): $____________________

Comments: ____

☐ If more space is needed, check box and attach continuation sheet(s).

Clear Page

Instructions for Schedule F: Campaign Services

Complete and attach this schedule only if one or more of the organization's owners, compensated officers, or lobbyists provided compensated campaign services (e.g., consulting services) to a City candidate during the reporting period. Include campaign services that are provided pursuant to a contingency fee agreement, such as a "win bonus." Reportable services include those that are related to the candidate seeking office or to a ballot measure committee controlled by the candidate. The services must be performed in exchange for a salary, bonus, or some other form of economic consideration. Do not disclose volunteer work performed for a candidate. If no compensated campaign services were rendered, check the applicable box on the cover sheet, and do not attach Schedule F.

Completing the form:

- Identify the organization's name at the top of each schedule.
- Fill out a separate entry for each owner, compensated officer, and lobbyist in the organization who provided campaign services to a City candidate during the reporting period.
- If the services were provided to a candidate for elective office, identify the name of the candidate and the office sought.
- If the services were provided to a candidate-controlled ballot measure committee, identify the name of the committee, the name of the candidate controlling the committee, and a brief description of the ballot measure (e.g., "increase transient occupancy taxes").
- Provide a brief description of the services provided (e.g., "served as campaign consultant for Candidate Jones").
- Identify the approximate amount of compensation that the owner, compensated officer, or lobbyist earned for campaign services during the reporting period. If the individual has not yet earned any compensation, but could be entitled to a contingency-based form of compensation in the future (e.g., a "win bonus"), state "contingency" on the form.
- Attach as many continuation sheets as are necessary to report all compensated campaign services provided by the owners, compensated officers, and lobbyists in the organization during the reporting period.
- Check the box at the bottom of the page if attaching an additional continuation sheet. Be sure to identify the name of the organization on the top of each continuation sheet.

For example: Tim works as a lobbyist for a company that qualifies as an organization lobbyist. Outside the scope of that employment, Tim occasionally works as a campaign consultant. In November, he starts working on a campaign for a Councilmember seeking re-election the following year. When his employer prepares its October-December disclosure report, it must identify Tim's campaign activities, including the name of the candidate and the office that candidate is seeking, the approximate amount of compensation he received from the candidate during the reporting period, and a description of the campaign services he provided to the candidate during the reporting period.

For example: Aidan is a lobbyist who worked on a Mayoral candidate's campaign under an agreement that he would volunteer his services, but be entitled to a "win bonus" in the amount of $2,500 if the candidate won the election. The candidate won the election in November and paid Aidan the $2,500 in January of the following year. When completing its fourth quarter report, the organization will report the $2,500 that Aidan earned in the quarter, even though the actual payment wasn't made until the first quarter of the following year. The organization will not report the payment on its first quarter report for the following year.

Note: The term "candidate" includes an elected City official running for office in a different jurisdiction. For example, a City Councilmember running for State Assembly is a "candidate" for purposes of these disclosure rules.

SCHEDULE F: CAMPAIGN SERVICES

Name of Organization: ____

Fill out a separate entry for EACH owner, compensated officer, or lobbyist of the organization who provided compensated campaign-related services to a candidate or a candidate-controlled committee (including a candidate-controlled ballot measure committee) during the reporting period.

Name of individual who provided campaign-related services: ______________________________

If services were to a candidate for elective office:

A. Name of candidate: ______________________________

B. Office sought: ______________________________

If services were to a ballot measure committee controlled by a candidate:

A. Name of committee: ______________________________

B. Name of candidate controlling committee: ______________________________

C. Description of ballot measure: ______________________________

Description of campaign-related services provided during the period: ______________________________

____

Approximate compensation earned for campaign-related services during the reporting period (for contingency payments not yet earned, state "contingency"): $ ______________

Name of individual who provided campaign-related services: ______________________________

If services were to a candidate for elective office:

A. Name of candidate: ______________________________

B. Office sought: ______________________________

If services were to a ballot measure committee controlled by a candidate:

A. Name of committee: ______________________________

B. Name of candidate controlling committee: ______________________________

C. Description of ballot measure: ______________________________

Description of campaign-related services provided during the period: ______________________________

____

Approximate compensation earned for campaign-related services during the reporting period (for contingency payments not yet earned, state "contingency"): $ ______________

Comments: ____

☐ If more space is needed, check box and attach continuation sheet(s).

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Instructions for Schedule G: City Contract Services

Complete and attach this schedule only if one or more of the organization's owners, compensated officers, or lobbyists provided compensated services during the reporting period under a City contract either as an employee, consultant, or independent contractor. If, for example, one of the organization's lobbyists was hired by the Mayor's office to provide consulting services in connection with outsourcing a City function, then the organization must report these consulting services. If no compensated services were rendered, check the applicable box on the cover sheet, and do not attach Schedule G.

Completing the form:

- Identify the organization's name at the top of each schedule.
- Fill out a separate entry for each owner, compensated officer, and lobbyist in the organization who personally provided compensated services under a contract with the City during the reporting period. Note that "City" includes all of the City's departments, agencies (such as CCDC and the Housing Commission), boards, and commissions.
- Identify the name of the person in the organization who provided the services.
- Identify the name of the applicable City department, agency, or board.
- State the approximate amount of compensation that person earned during the reporting period (regardless of whether the compensation was actually received).
- Provide a brief description of the services that were rendered (e.g., "consulting work pertaining to outsourcing computer services"; "employment in Mayor's office").
- Attach as many continuation sheets as are necessary to report all compensated services provided by the owners, compensated officers, and lobbyists in the organization during the reporting period.
- Check the box at the bottom of the page if attaching an additional continuation sheet. Be sure to identify the name of the organization on the top of each continuation sheet.

For example: Malcolm is a lobbyist who works for a non-profit environmental advocacy organization. Because of his expertise, the City's Environmental Services Department retains him as a consultant to evaluate the impact of a proposed hazardous waste program. Malcolm starts and completes the contract in March. He submits a bill for $2,500 and he's paid in April. When his employer prepares its January-March quarterly disclosure report, it must report that (1) Malcolm provided services to the City; (2) the services were provided to the Environmental Services Department; (3) Malcolm earned $2,500 for the services he provided; and (4) Malcolm's work involved evaluating the environmental impact of a proposed hazardous waste program.

✓ Note: when the organization prepares its April-June quarterly disclosure report, it need not disclose the consulting contract even though the payment was received in April (because the payment was "earned" in the prior quarter).

✓ Note: for purposes of this example, it is not relevant whether Malcolm's contract with the City was made with the non-profit organization or with Malcolm personally. In either case, Malcolm's services to the City need to be disclosed.

SCHEDULE G: CITY CONTRACT SERVICES

Name of Organization: ____

Fill out a separate entry for EACH owner, compensated officer, or lobbyist of the organization who provided compensated services under a contract with the City of San Diego during the reporting period.

Name of individual who provided contract services: ________________________________

Name of department, agency, or board for which the services were provided: ____________________

Approximate amount of compensation earned during the reporting period: $____________________

Description of services provided: ____

Name of individual who provided contract services: ________________________________

Name of department, agency, or board for which the services were provided: ____________________

Approximate amount of compensation earned during the reporting period: $____________________

Description of services provided: ____

Name of individual who provided contract services: ________________________________

Name of department, agency, or board for which the services were provided: ____________________

Approximate amount of compensation earned during the reporting period: $____________________

Description of services provided: ____

Name of individual who provided contract services: ________________________________

Name of department, agency, or board for which the services were provided: ____________________

Approximate amount of compensation earned during the reporting period: $____________________

Description of services provided: ____

Name of individual who provided contract services: ________________________________

Name of department, agency, or board for which the services were provided: ____________________

Approximate amount of compensation earned during the reporting period: $____________________

Description of services provided: ____

Comments: ____

☐ If more space is needed, check box and attach continuation sheet(s).

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