



Item 12 - Executive Director Report

Francis Upton IV, Chair
Tanya Bayeva, Vice Chair
Alea Gage
Ryan Micik
Vincent Steele
Karun Tilak

Nicolas Heidorn, Executive Director

TO: Public Ethics Commission
FROM: Suzanne Doran, Acting Executive Director
Nicolas Heidorn, Executive Director
DATE: June 30, 2025
RE: Executive Director's Report for the July 16, 2025, Regular PEC Meeting

This memorandum provides an overview of some of the Public Ethics Commission's (PEC's or Commission's) most significant activities since the last Commission meeting and significant upcoming activities not included in other program reports, including a discussion of staffing, budget, and policy initiatives.

Executive Director Search

In April 2025, Executive Director Heidorn announced he would be stepping down from the Commission, effective July 7, 2025. Between April 28 and June 2, the Commission conducted a public recruitment and accepted applications for a new Executive Director. A total of 29 people applied.

Following past practice, Chair Upton established an Executive Director Recruitment Subcommittee, consisting of himself (Chair), Commissioner Micik, and Commissioner Bayeva, to do a first review of all the applications that were received. The Subcommittee invited 13 applicants to interview and interviewed 12 applicants (one withdrew). Of the interviewed applicants, the Subcommittee forwarded the four most-qualified applicants to the full Commission for review in closed session at a Special Meeting held on June 25, 2025. Pursuant to Charter Section 603(g), the Commission selected three finalists and forwarded them to the City Administrator for selection of the next Executive Director. As of this writing, the City Administrator had not yet made his selection.

Until the final Executive Director is selected, Program Manager Suzanne Doran was elevated to serve as Acting Executive Director, effective July 1.

Fiscal Year 2025-2027 Budget

On June 11, 2025, the City Council adopted the FY 2025-2027 Budget. Proposed Budget highlights for the PEC include:

- **No cuts to General Purpose Fund-funded staff positions.** All currently budgeted staff positions are retained. However, the PEC's grant-funded Democracy Dollars Outreach Specialist position was not included in the budget. The PEC will use remaining grant funds to extend the position for several week after July 1, 2025, at which point the position will terminate.
- **Strengthens the PEC's Enforcement Program by adding a second Investigator and a part-time Law Clerk in FY 25-26 and a third Investigator in FY 26-27.** With these additions, Enforcement Unit staffing will increase from 2 full-time equivalent (FTE) positions to 4.1 FTE by July 2026, which is critically needed to address the Commission's extreme case backlog. The Budget also includes a ~\$35,000 increase to O&M, which Commission Staff intends to use for additional contract support for the Enforcement Unit and incoming Executive Director.

- **Democracy Dollars Program Postponed.** The budget does not include any funding for Democracy Dollars vouchers or administration of the Program and freezes most Charter-mandated positions for the Program. As a result, this budget necessarily postpones the implementation of the Democracy Dollars Program for 2026. However, the Budget did maintain the Democracy Dollars startup funding necessary to develop the software platform need to implement the Program in 2028. In addition, the Budget provides for the addition of an Ethics Analyst II in the last six months of FY 26-27, which may be used to assist with Program implementation and outreach if the Commission implements in 2028.
- **Restores funding for the Limited Public Financing (LPF) program.** The final budget restores the LPF Program for 2026 and provides \$250,000 over two years for this purpose. This budget amendment ensures, with Democracy Dollars postponed, *that 2026 will not be the first election in more than two decades without any public financing in Oakland.*
- **Replaces the Administrative Assistant II position with an Ethics Analyst I position.** This higher-level staff position will provide greater support for the Commission's compliance activities, freeing up additional staff capacity in the enforcement and regulatory programs to conduct investigations or provide greater client support.

Although the PEC budget was cut more than 50 percent compared with what is required under the City Charter and Measure W (2022), this budget nonetheless represents a substantial improvement in the PEC's capacity over the FY 2023-2025 budget. Interim Mayor Jenkins's budget increased the PEC's Enforcement staffing from 1 to 2 Investigators, a key PEC priority. In addition, the City Council's Budget Team (Co-Chair Ramachandran, Co-Chair Brown, Unger, and Wang), added several important amendments requested by the PEC, namely: bringing Enforcement Unit staffing up to 3 Investigators and funding the LPF Program for 2026. These are important improvements over last cycle's budget that will increase the PEC's effectiveness as an anti-corruption agency. The PEC appreciates the City Council and Administration for these critical changes.

OCRA and LPF Amendments

At its May meeting, pursuant to the City Charter requirement to provide review and comment on City Council proposals amending the laws the PEC enforces or administers, the PEC adopted a position on a proposal by Councilmembers Jenkins, Ramachandran, and Houston to amend the Oakland Campaign Reform Act (OCRA) and the Limited Public Financing (LPF) Program, which was transmitted to the City Council. Chair Upton, representing the Commission, provided the Commission's formal comment before the City Council's Rules Committee and the full City Council.

On June 17, 2025, the City Council **approved** its proposal without change. As adopted, the ordinance, effective June 17, (a) increased campaign contribution limits from \$650 to \$900; (b) increased the maximum annual total contribution limits to officeholder accounts to \$75,000 for district councilmembers and \$100,000 for other citywide elected officeholders; and (c) reauthorized the LPF through the 2028 election cycle. Led by Ethics Analyst Jelani Killings, the PEC sent out an advisory to campaign filers and subscribers and updated the website and the OCRA guide to reflect these changes on June 18.

New Office Location

As reported in May, the Commission received approval from the City Administrator to move all its staff into a new suite at 250 Frank Ogawa Plaza, across from City Hall, which better meets the Commission's operational needs now and into the future. The Commission's address is now 250 Frank Ogawa Plaza, Suite 6303. Staff posted and distributed flyers at City Hall and in the 250 building, sent an

announcement to City staff, updated website contact information, and sent notices to our filers to inform them of our new address and ensure uninterrupted service. The new office suite requires design updates to accommodate the PEC's unique security and operational needs and there is still much to be done during this transition, but Commission staff is excited about our new home and non-enforcement staff have all relocated to the new office space.

Commissioner Recruitment

Two Commission-appointed seats on the Commission will expire in January of 2026¹. In August, the PEC will begin a public recruitment process to fill these positions. Staff anticipates the application period will close in November and that a Subcommittee will recommend the most qualified applicants to the full Commission for selection at a December special meeting.

Attachment: Disclosure and Engagement Program Report

¹ Note: under the City Charter, Commissioners may serve up to one-year in a holdover capacity.



Item 12 - Disclosure and Engagement Report

Francis Upton IV, Chair
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Suzanne Doran, Acting Executive Director

TO: Public Ethics Commission
FROM: Alex Van Buskirk, Lead Analyst, Compliance and Disclosure
Jelani Killings, Lead Analyst, Education and Engagement
DATE: July 1, 2025
RE: Disclosure and Engagement Monthly Report for the for the July 16, 2025,
Regular PEC Meeting

This memorandum provides a summary of major accomplishments in the Public Ethics Commission's (PEC or Commission) Disclosure and Engagement program activities since the last regular meeting. Commission Staff disclosure activities focus on improving online tools for public access to local campaign finance and other disclosure data, enhancing compliance with disclosure rules, and conducting data analysis for Public Ethics Commission projects and programs as required. Engagement activities include training and resources provided to the regulated community, as well as general outreach to Oakland residents to raise awareness of the Commission's role and services and to provide opportunities for dialogue between the Commission and community members.

Compliance with Disclosure Requirements

Commission Staff conducts filing officer duties as required by state and local law and aims to help candidates, lobbyists and City officials submit required disclosure reports and ensure residents can easily access campaign finance, lobbyist, and ethics-related data and information.

Campaign Finance Disclosure – The second semi-annual statement deadline is upcoming, on July 31, 2025, and covers activity through June 30, 2025. Campaign statements are available to view and download at the Commission's [Public Portal for Campaign Finance Disclosure](#). Campaign finance data, graphs, and visualizations are available via the [City's Open Data portal](#) and the Commission-sponsored app [Open Disclosure Oakland](#), as well as links on the PEC website.

Lobbyist Registration Program – The Oakland Lobbyist Registration Act (LRA) requires any person that qualifies as a lobbyist to register annually with the Commission before conducting any lobbying activity. As of July 1, 2025, 51 lobbyists are currently registered with the City of Oakland. All lobbyists paid the \$500 fee upon registration, thanks to the new point-of-sale (POS) system created and implemented with the assistance of the Information Technology Department.



July 31, 2025 is the deadline for lobbyists in Oakland to file their Quarterly Activity Report for the second quarter of 2025. An up-to-date list of registered lobbyists and lobbyist activity reports with links to view and download individual reports is available at the Public Ethics Commission's [Lobbyist Dashboard and Data](#) webpage.

Illuminating Disclosure Data

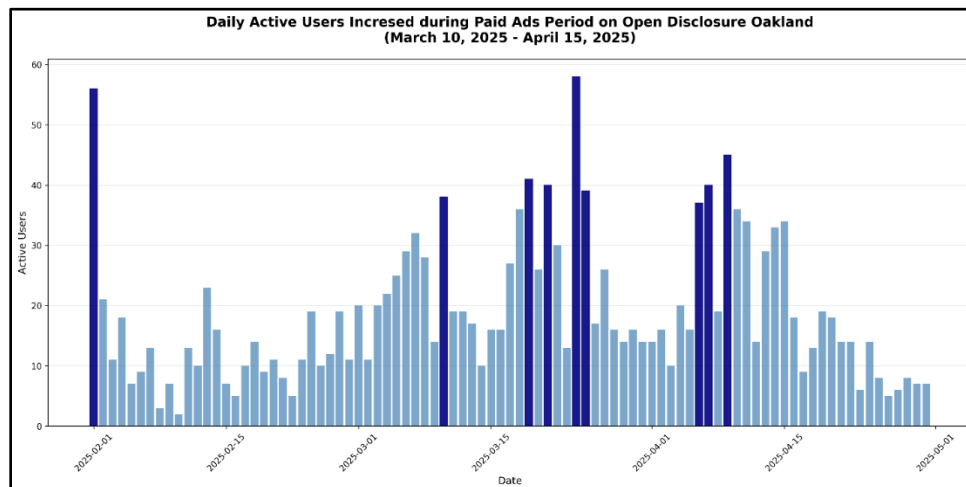
Open Disclosure Oakland – The [opendisclosure.io](#) campaign finance app was live with the data for the April 15, 2025, Special Election. Open Disclosure Oakland, a nonpartisan tool, was developed by volunteers from [OpenOakland](#), a civic technologist group, in partnership with Commission Staff to give all Oakland residents equal access to campaign finance data. The Open Disclosure Oakland website shows funds donated to both political candidates and ballot measure committees and provides clear summaries of money raised and spent as well as financial trends for each election. The website also includes a search function that makes campaign donation records easy to search and sort and allows users to search campaign donors by name across multiple campaigns and elections. Open Disclosure Oakland is updated regularly with data imported directly from the [City's campaign finance database](#) and includes a notification system that sends subscribers alerts about new campaign reports.

Commission Staff analyzed activity on Open Disclosure Oakland for [opendisclosure.io](#) based on Google Analytics data covering the period February 1, 2025, through April 30, 2025 (88 days). The PEC ran paid advertisements for the Open Disclosure Oakland website [opendisclosure.io](#) from March 10, 2025 through April 15, 2025 (36 days). Platform engagement highlights between February 1, 2025, through April 30, 2025 (88 days) include:

- 6,351 total page views across all campaign-related pages; and
- 1,398 individual “active users” who engaged with the website.

Moreover, top weeks for user engagement include the weeks of:

- March 15, 2025 through March 21, 2025 (over 200 active users);
- March 22, 2025 through March 28, 2025 (200 active users); and
- April 5, 2025 through April 11, 2025 (nearly 250 active users).



New users by “channel” data include:

- 632 from organic searches¹ (45% of users);
- 632 “direct traffic”² users (an additional 45% of users); and
- 134 users (the remaining 10% of users) through channels such as social media, email, and related referrals (which includes the PEC’s paid advertising of the Open Disclosure Oakland platform).

Since launching Open Disclosure Oakland in 2014, the website has reached over 45,000 users with nearly 200,000 page views of Open Disclosure Oakland content.

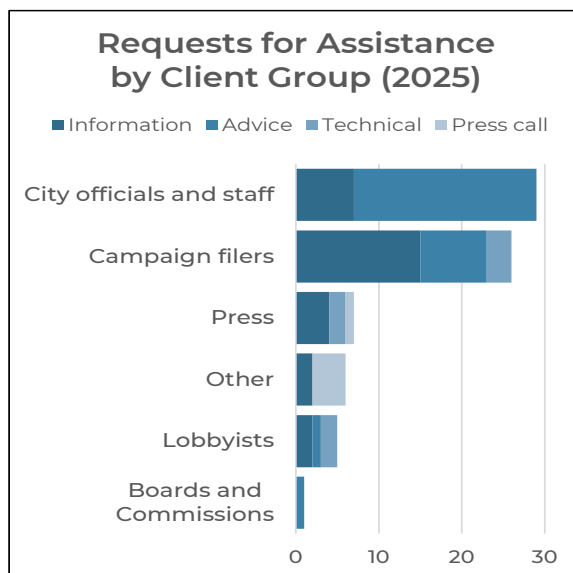
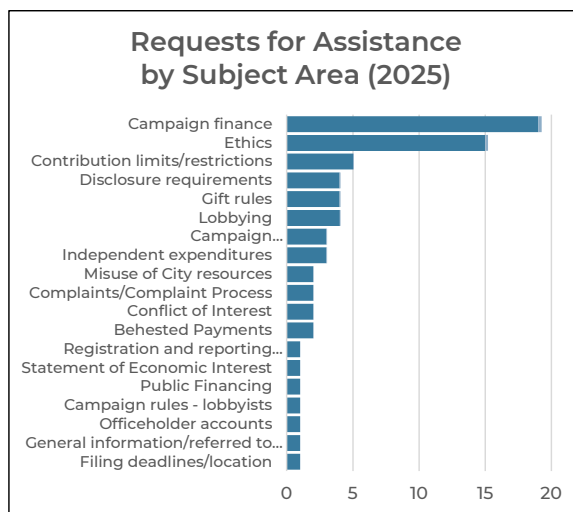
Advice and Engagement

The Commission’s Advice and Engagement Program seeks to ensure Oakland public servants, candidates for office, lobbyists, and City contractors understand and comply with City campaign finance, ethics, and transparency laws.

Advice and Technical Assistance – Between January 2025 and June 2025, Commission Staff responded to 78 requests for information, advice or assistance regarding campaign finance, ethics, Sunshine law, or lobbyist issues.

New Employee Orientation – Commission Staff continues to make presentations at the City’s monthly New Employee Orientation (NEO) providing new employees with an introduction to the Public Ethics Commission and overview of the Government Ethics Act (GEA).

In the months of May 2025 and June 2025, Commission Staff provided an overview of the City’s ethics rules to 73 new City employees. Employees required to file Form 700 disclosure statements were also assigned the Commission’s mandatory online Government Ethics Training for Form 700 filers.



¹ This refers to sessions originating from unpaid search engine results. It includes data from search engines like Google, Bing, etc. Users find the site through keywords or phrases and click on the organic (non-ad) links displayed on the search engine results page.

² This encompasses sessions where users directly type the website’s URL into their browser or use a saved bookmark. It can also include cases where the source of traffic cannot be determined (e.g., a non-tagged link in an email, PDFs, or certain mobile apps).

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OPRYD Ethics Training – On May 28, 2025, Commission Staff conducted an ethics training for 55 new employees of the Oakland Parks, Recreation, and Youth Development Department during their summer staff orientation.

Supervisory Academy – On May 29, 2025, Commission Staff facilitated an ethics discussion for the City’s quarterly Supervisory Academy. Commission Staff provided an overview of the Government Ethics Act including conflicts of interests, gift restrictions, and postemployment restrictions. A total of 20 employees attended the training.

Ethics Check-Ins – Commission Staff continued conducting ethics check-ins with elected officials and their staff to provide an overview of the Commission and its work, and to share information about recent changes in both local and state ethics and transparency laws. Topics covered include gift rules, changes to the Lobbyist Registration Act, social media disclaimer requirements, changes to the state’s Levine Act regarding limitations on campaign contributions to local elected officials from certain parties and disqualifications based on past campaign contributions, and future outreach opportunities.

Check-ins allow Commission Staff to better understand the support needs of elected officials and their staff in complying with local ethics laws. Commission Staff also shared about ethics training requirements and provided a link to the PEC’s ethics resource binder. Commission Staff met with Councilmember Charlene Wang on May 23, 2025 and Mayor Barbara Lee on June 18, 2025 for related ethics check-ins.

PEC Advisories – As part of our continuing education efforts, Commission Staff issues routine advisories to ensure that stakeholders subject to the laws under the PEC’s jurisdiction are aware of local rules impacting them. On June 18, 2025, Commission Staff sent an advisory to campaign filers regarding the recent amendments to the Oakland Campaign Reform Act including the new temporary contribution limits and the new yearly contribution caps for officeholder committees.

Website Migration – On June 26, 2025, the City launched its new website. Commission Staff ensured a smooth transition by successfully migrating all relevant webpages from the previous site and aligning them with the updated design and structure. Moving forward, Commission Staff will continue refining webpage content and layout to enhance user experience and ensure information remains clear and accessible.

General Outreach – In collaboration with the City Auditor and the Office of the Inspector General, Commission Staff continues to coordinate outreach presentations for our “Meet Your Accountability Officers” initiative. This effort is aimed to inform the public about the distinct roles and responsibilities of each office in promoting transparency, integrity, and accountability within city government. As part of this effort, Commission Chair Francis Upton IV presented to the East Oakland Community Group on May 19, 2025.

Mediation Program

Pursuant to the Oakland Sunshine Ordinance, the Commission conducts mediation of public records requests made by members of the public to City departments for records within the department's control.

The PEC currently has 7 open mediations. No new mediations have been opened or closed since the last meeting.

