

File No. 230198

Committee Item No. 3

Board Item No. 22

# COMMITTEE/BOARD OF SUPERVISORS

## AGENDA PACKET CONTENTS LIST

Committee: Rules Committee

Date March 13, 2023

Board of Supervisors Meeting

Date March 21, 2023

### Cmte Board

- Motion
- Resolution
- Ordinance
- Legislative Digest
- Budget and Legislative Analyst Report
- Youth Commission Report
- Introduction Form
- Department/Agency Cover Letter and/or Report
- Memorandum of Understanding (MOU)
- Grant Information Form
- Grant Budget
- Subcontract Budget
- Contract/Agreement
- Form 126 - Ethics Commission
- Award Letter
- Application
- Form 700
- Information/Vacancies (Boards/Commissions)
- Public Correspondence

### OTHER (Use back side if additional space is needed)

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Completed by: Victor Young Date March 9, 2023

Completed by: \_\_\_\_\_ Date \_\_\_\_\_

1 [Mayoral Appointment, Homelessness Oversight Commission - Jonathan Butler]

2

3 **Motion approving the Mayor’s nomination for the appointment of Jonathan Butler to**  
4 **the Homelessness Oversight Commission, term ending May 1, 2027.**

5

6 MOVED, That the Board of Supervisors of the City and County of San Francisco does  
7 hereby approve Mayor London Breed’s nomination for the following appointment of the  
8 hereinafter designated person to serve as a member of the Homelessness Oversight  
9 Commission, pursuant to the provisions of Charter Section 4.133, for the term specified:

10 Jonathan Butler, seat 2, inaugural appointment, appointed by the Mayor subject to  
11 confirmation by the Board of Supervisors within 60 days and with experience in providing  
12 services to or engaging in advocacy on behalf of persons experiencing homelessness, for the  
13 unexpired portion of a four-year term ending May 1, 2027.

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## Notice of Appointment

February 22, 2023

San Francisco Board of Supervisors  
City Hall, Room 244  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102

Honorable Board of Supervisors,

Pursuant to Charter Section 4.133; Article IV of the Charter of the City and County of San Francisco, I hereby make the following nominations for appointment to the Homeless Oversight Commission:

- Sharky Laguana for Seat 1 with a term ending May 1, 2025.
- Dr. Jonathan Butler for Seat 2 with term ending May 1, 2027.
- Katie Albright for Seat 3 with term ending May 1, 2027.
- Vikrum Aiyer for Seat 4 with term ending May 1, 2025.

I am confident that the above mentioned nominees will serve our community well. Attached are their qualifications to serve, which will demonstrate how their appointments represent the community of interest, neighborhoods and diverse populations of the City and County of San Francisco.

Should you have any question about this appointment, please contact my Director of Commission Affairs, Tyra Fennell, at 415-554-6696

Sincerely,

A handwritten signature in blue ink that reads "London Breed".

London N. Breed  
Mayor, City and County of San Francisco

Highly organized professor, nonprofit leader, and community activist; poised to promote diversity and inclusive excellence by leveraging health, academic, research, and scientific best practices.

Detail-oriented professional with Ph.D. in Sociology and extensive experience in executing in-depth research and teaching undergraduate programs and courses on medical sociology/health inequalities. Expert in supervising departmental and community operations, programs, and projects. Demonstrate commitment to mentoring **and** facilitating students in achieving academic and research missions. Proven track record in accomplishing peer-reviewed published scholarships and obtaining research grants focusing on realizing ongoing missions. Repeated success in executing high-level externally funded research in adversity and cardiovascular diseases, psychosocial stress, sleep, type II diabetes, and obesity to meet set objectives. Possess strong analytical and critical thinking skills and leverage insights for decision-making and bias to execution.

### KEY ACCOMPLISHMENTS

- Delivered significant contributions by serving as outstanding professor, pastor, nonprofit leader, and community activist.
- Fulfilled communities' health needs by leveraging in-depth knowledge and understanding of social determinants of health.
- Mentored and guided wide range of medical, Ph.D., and master's students on effective quantitative and qualitative research methodologies for completion of assigned projects as per quality standards.
- Conducted comprehensive research on social determinants of health, chronic disease epidemiology and risk factors, community-based participatory research, and other areas to obtain set goals.
- Advised and coached various undergraduate students and other trainees in research and community engagement work and projects, as well as encouraged to participate in activities at San Francisco State University.
- Pinpointed policy issues and developed appropriate analytical and procedural frameworks for streamlining ongoing processes and managing organizational crises.
- Fostered and cultivated long-term relationships with foundations and government agencies to meet set objectives.
- Promoted evidence-based policies by liaising with high-level organizational and program leaders and allocated funds to aid community health improvement initiatives.

### AREAS OF EXPERTISE

- |                                   |                                  |                             |
|-----------------------------------|----------------------------------|-----------------------------|
| ❖ Project & Operations Oversight  | ❖ Quantitative Analysis          | ❖ Grants & Findings         |
| ❖ Committee Supervision & Control | ❖ Team Training & Leadership     | ❖ Public/Community Services |
| ❖ Strategic Planning & Execution  | ❖ Cross-Functional Collaboration | ❖ Research & Development    |
| ❖ Resource Creation & Allocations | ❖ Best Teaching Practice         | ❖ Curriculum Instructions   |
| ❖ Qualitative Data Analysis       | ❖ Relationship Building          | ❖ Problem Resolution        |

### ACADEMIC (TEACHING) EXPERIENCE

**University of California, Department of Family and Community Medicine | San Francisco, CA** 2015 – Present  
**Assistant Professional Researcher, 2019 – Present**

Study and analyze adversity and cardiovascular disease as postdoctoral fellow in NURTURE Center in division of cardiology of UCSF. Define and develop research objectives, projects, and proposals using excellent intellectual thinking abilities for submitting to granting agencies and foundations. Offer assistance to professionals in completing experiments and gathering/analyzing information.

- Reduced health inequalities within medical arena by working on research projects.
- Recognized academic and community-academic opportunities by acting as primary mentor.

**University of California, San Francisco, Black Health Initiative, Associate Director**  
**2021 - present**

- Partner with and support community organizations, groups, and activities that serve the Western Addition/Filmore District, Lakeview/OMI (Ocean View -Merced Heights- Ingleside), and Potrero Hill neighborhoods in addition to Bayview-Hunter's Point (BVHP).
- Build upon and expand our BHI Street Team Outreach Model including health & wellness pop-ups as BHI and in partnership with community partners to support joint efforts in targeted ways that optimize resources and increase impact
- BHI will create opportunities for faculty, trainees, and other scholars interested in (i) anti-racism research, (ii) community-based participatory research (CBPR) in the Black community, (iii) implementation science, (iv) ethnography to address structural racism/barriers to health equity, and (v) effective interventions to promote health equity, anti-racism, and overall equity in the Black community

- Identified sources of funding and contributed to process of securing funds to support research initiatives.

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**Prince George's Community College | Upper Marlboro, MD** **2014 – 2015**  
**Adjunct Professor (Introductory-level Sociology Course)**

*Applied best teaching practices while instructing introductory-level sociology courses to students. Created inclusive and supportive learning environment in classroom for students to yield favorable results.*

- Supervised primary research projects of undergraduates by providing effective guidelines to meet academic objectives.

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**Northern Virginia Community College | Sterling, VA** **2014 – 2015**  
**Adjunct Professor (Introductory-level Medical Sociology Course)**

*Showcased exceptional teaching and subject matter expertise while delivering lectures to students on introductory-level medical sociology courses. Focused on enhancing student engagement and comprehension of subject matter.*

- Cultivated commitment to lifelong learning by connecting course material to broader themes and current events.
- Steered remarkable efforts for sociology discipline development via research activities, publications, and education.

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**Howard University | Washington, DC** **2011 – 2015**  
**Teaching Assistant (Introductory-level Sociology Course), 2012 – 2015**

*Applied effective teaching methodologies while instructing students in preliminary medical sociology courses. Developed course outline, activities, and manuals aligned with set objectives to increase student performance.*

- Encouraged students to participate in class discussions and conducted group work by devising efficient lesson plans.

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**Research Assistant, 2011 – 2015**

*Involved in maintaining comprehensive portfolio of services to support research activities of students. Retained quality control standards to preserve integrity of data and findings.*

- Offered robust assistance to assure flawless completion of research projects by leveraging exceptional research skills.

### **COMMUNITY IMPACT (CIVIC ENGAGEMENT)**

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**San Francisco African American Faith-Based Coalition | San Francisco, CA** **2020 – Present**  
**Executive Director**

*Contribute to improving organizational infrastructure by providing strategic leadership and governance to organization. Offer support in transferring organization status to 501c3 status by meeting set objectives. Coordinate efforts in enrolling 60 students to take piano lessons, enroll in civic engagement courses, and participate in one-on-one and group tutoring.*

- Monitored distribution of about 700K prepared meals, 70K produce boxes, and 5000+ vaccinations to facilitate communities.
- Generated \$5M from March 2020 to December 2021 for food security, immunization, education, and mental health initiatives; allocated 4M for food security, 700k for vaccination clinics, and 1M for education.

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**National Association for the Advancement of Colored People (NAACP) | San Francisco, CA** **2017 – Present**  
**1st Vice-President; Health Committee Chair**

*Implement initiatives under direction of SF Department of Public Health to deliver world-class mental health care to SFUSD students. Partner with Rafaki Health Coalition, San Francisco Department of Public Health, and National Association for Advancement of Colored People to increase awareness regarding importance of social determinants of health at community level.*

- Spoke at news conferences, town halls, and local health group meetings to enlighten African-Americans about significance of supporting Sugary Drinks Distributors Tax and Prohibiting Use of Menthol Cigarettes bills.
- Mitigated health inequalities in city by building black health task force and governing "State of Black Health in San Francisco" town hall using matchless leadership abilities.

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**San Francisco Sugary Distributors Tax Advisory Committee | San Francisco, CA** **2016 – Present**  
**Data & Evidence Sub-Committee Chairperson**

*Deliver remarkable efforts in diagnosis, treatment, research, and education of chronic and other diseases associated with consumption of sugar-sweetened beverages by scheduling various discussions with San Francisco Bay Area scientists.*

- Formulated evidence-based research strategies to support advisory committee and city leadership in achieving set objectives.

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## CHURCH/RELIGIOUS RESPONSIBILITIES

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**Third Baptist Church | San Francisco, CA**  
**Associate Pastor and Health Minister**

**2016 – Present**

*Organize and execute outreach and health education programs within church. Deliver health-related sermons/lectures to parishioners once a month and teach bible study at Sunday service to promote healthy and peaceful lives.*

- Secured \$3K in grant funding by organizing fundraising events in coordination with UCSF's Abundant Life Health Ministries.
- Played key role in implementing and completing Annual Sistahs' Go Red program to obtain set goals.

## COMMUNITY LEADERSHIP

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**Back On Track Incorporated Tutoring Program | San Francisco, CA**  
**Board Member/Executive Director**

**2016 – Present**

*Assess grant proposal drafts and recognize potential funding risks using exceptional analytical abilities. Conduct deep research to evaluate program scope and propose appropriate suggestions to executive director to yield favorable outcomes.*

- Headed personnel committee for flawless accomplishment of ongoing initiatives.
- Oversaw non-denominational community-based program serving 2,000+ young people from diverse multicultural populations throughout San Francisco.

**Third Baptist Foundation | San Francisco, CA**  
**Executive Director**

**2016 – Present**

*Manage and provide oversight for administration of all ministry areas within organization to meet set goals.*

- Attained \$300K in grant funding by arranging fundraising events in coordination with local/national organizations.
- Secured \$150+K in grant funding to facilitate community-based programs, such as Children's Defense Fund Freedom School and Charles A. Tindley Music Academy for San Francisco Bay Area students.

**American Heart Association, Young Professional Leadership Council – Bay Area | San Francisco, CA**  
**Board Member**

**2016 – 2018**

*Exercised fiduciary oversight of ethical and legal affairs and ensured organization's stability and viability to fulfill set mission. Served in domains of psychosocial stress, sleep, and type II diabetes and obesity and submitted several abstracts to AHA Annual Scientific Sessions 2016, 2017, and 2018 to improve lives of all people living with diabetes at national and local levels.*

- Acquired selection of submitted work related to cumulative psychosocial stress and risk of diabetes by AHA and National Institute of Diabetes for presentation at AHA scientific sessions in 2018.

## EDUCATION

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**Ph.D. in Sociology | Howard University, Washington, DC**

**Dissertation:** "The Relationship Between Religiosity and Other Correlates Over Time on the Overweight and Obesity Continuum: A Focus on African Americans"

**Master of Divinity in Religion | Howard University, Washington, DC**

**Bachelor of Business Administration in Marketing | Texas Southern University, Houston, TX**

## POSTDOCTORAL TRAINING

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**Postdoctoral Scholar**, Center for the Study of Adversity and Cardiovascular Disease (NURTURE Center), Division of Cardiology, Medicine, 2015-2018

## AWARD & RECOGNITION

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**COVID Hero Award**, State of California (Scott Weiner, State Senator), 2021 | **COVID Pandemic Hero Award**, Department of Family and Community Medicine, University of California, San Francisco, 2020 | **Chancellor's Award for Public Service**, University of California, San Francisco, 2019 | **Selected Scholar, Health Equity Leadership Institute**, University of Wisconsin, Madison, 2019 | **Minority Travel Grant**, American Heart Association, 2016 | **Alumnus of the Year**, Texas Southern University, 2015 | **Graduate Assistant Scholarship**, Howard University, 2011-15

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## PROFESSIONAL MEMBERSHIP

**Reviewer**, Health Equity, 2022 | **Reviewer**, Annals of Epidemiology, 2019 | **Reviewer**, Diabetes Care, 2019 | **Member**, American Sociological Association, 2011 | **Member**, Scientific Society for the Study of Religion, 2018 | **Member**, Epidemiology Membership and Communications Committee, American Heart Association, 2018 | **Member**, Research Peer Review Subcommittee, American Heart Association, 2018 | **Member**, Global Health Committee, Association of Black Cardiologists, 2018 | **Member**, UCSF Chancellor's Council on Climate, Culture, and Inclusion (4C1) **External Reviewer**, Dissertation Committee at Howard University

## RESEARCH PUBLICATIONS

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Gentsch, AT, **Butler JZ**, O'Laughlin, K, et al. Perspectives of COVID-19 vaccine-hesitant emergency department patients to inform messaging platforms to promote vaccine uptake. *Acad Emerg Med*. 2023; 30: 32- 39. doi: 10.1111/acem.14620

Carson M, Rios-Fetchko F, Ramirez M, **Butler JZ**, Vargas R, Cabrera A, Gallegos-Castillo A, LeSarre M, Liao M, Woo K, Ellis R, Liu K, Burra A, Doyle B, Leung L, Grumbach K, Fernandez A. "COVID-19 vaccination perceptions among young adults of color in the San Francisco Bay Area" [under review; submitted to *Journal of Immigrant and Minority Health*]

**Butler JZ**, Carson M, Rios-Fetchko F, Vargas R, Cabrera A, Gallegos-Castillo A, LeSarre M, Liao M, Woo K, Ellis R, Liu K, Burra A, Ramirez M, Doyle B, Leung L, Fernandez A, Grumbach K. COVID-19 vaccination readiness among multiple racial and ethnic groups in the San Francisco Bay Area: A qualitative analysis. *PLoS One*. 2022 May 12;17(5): e0266397. doi: 10.1371/journal.pone.0266397. PMID: 35550627; PMCID: PMC9098010.

**Butler JZ**, Slopen N, Zaslavsky AM, Buring J, Albert MA. Religious Attendance and Ideal Cardiovascular Health in Older Women [abstract accepted to AHA scientific session 2020].

**Butler JZ**, Albert MA. Tackling Adversity and Cardiovascular Disease. *San Francisco Marin Med*, 2018. 91(5):14-15.

Jordan, C., **Butler JZ**, Myers, J. et al. Exercise Prescription for Cardiovascular Disease. *Current Cardiovascular Risk Reports* (2018) 12:19.

**Butler JZ**, Zaslavsky AM, Williams D, Slopen N, Buring J, Pradhan A, Albert MA. Cumulative Psychological Stress and Incident Type II Diabetes Mellitus in Older Women [Under review; abstract accepted to AHA scientific session 2018]

**Butler JZ**, Zaslavsky AM, Williams D, Slopen N, Buring J, Albert MA. Sleep Debt and Type II Diabetes Mellitus in Middle-Aged to Older Women. 2016 [manuscript in progress; abstract accepted to AHA—Epidemiology scientific session 2017].

**Butler JZ**, Zaslavsky AM, Williams D, Slopen N, Buring J, Pradhan A, Albert MA. Cumulative Psychological Stress and Type II Diabetes Mellitus in Women [Under review; abstract accepted to AHA scientific session 2016].

**Butler JZ**, "The Relationship between Religiosity and Other Correlates Over Time on the Overweight and Obesity Continuum: A Focus on African Americans" Ph.D. dissertation, Department of Sociology and Anthropology, Howard University, Washington, D.C., 2015.

Livingston I.L., Nuriddin T J, Staggers R, **Butler JZ**. Exploring the Globalization, Stress and Cancer Relationship: A Selected Focus on Sub-Saharan Africa. *Journal of Global Awareness*, 2014; 14(1): 42-48.

## RESEARCH PRESENTATIONS

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**Invited Keynote Speaker** "Tackling Adversity and Cardiovascular Disease 48th Annual National Black Nurses Association Conference Leadership Luncheon, St. Louis, MO, 2018

**Invited Keynote Speaker**, "Adversity and the Heart: The Impact of Racism on Cardiovascular Health", San Francisco Department of Public Health. Uplifting Black Health: bringing together the resources to support a healthy Black community, 2018

**Invited Speaker** "Cumulative Psychological Stress and Type II Diabetes Mellitus in Women", American Heart Association Scientific Session, Orange County, CA 2017

**Invited Speaker** "African American Churches and Health Ministries", 10th Annual Abundant Life Health Ministries Symposium, 2017

**Invited Speaker** "Cumulative Psychological Stress and Type II Diabetes Mellitus in Women", American Heart Association Scientific Session, New Orleans, LA, 2016

**Invited Speaker** "The Relationship between Obesity and Mortality", Howard University Washington D.C., Department of Sociology and Anthropology, 2013

**Invited Speaker**, Dr. Walter M. Booker, Sr. Memorial Symposium, in conjunction with the American Heart Association's (AHA) Scientific Sessions. This year's theme is "Structural Racism and Healthcare Disparity: Cause or Effect?", Chicago, IL, 2022

## TECHNICAL SKILLS

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SAS and SPSS Programming and NVIVO Qualitative Analysis Software

STATEMENT OF ECONOMIC INTERESTS  
COVER PAGE  
A PUBLIC DOCUMENT

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)  
Butler Jonathan Z

1. Office, Agency, or Court

Agency Name (Do not use acronyms)  
City of San Francisco

Division, Board, Department, District, if applicable Your Position  
Homeless Commission Commissioner

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: \_\_\_\_\_ Position: \_\_\_\_\_

2. Jurisdiction of Office (Check at least one box)

- State  Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)
- Multi-County \_\_\_\_\_  County of San Francisco
- City of San Francisco  Other \_\_\_\_\_

3. Type of Statement (Check at least one box)

- Annual: The period covered is January 1, 2022, through December 31, 2022.  Leaving Office: Date Left \_\_\_\_/\_\_\_\_/\_\_\_\_\_  
-or- The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_\_, through (Check one circle.)  
 The period covered is January 1, 2022, through the date of leaving office.
- Assuming Office: Date assumed \_\_\_\_/\_\_\_\_/\_\_\_\_\_.  The period covered is \_\_\_\_/\_\_\_\_/\_\_\_\_\_, through the date of leaving office.
- Candidate: Date of Election \_\_\_\_\_ and office sought, if different than Part 1: \_\_\_\_\_

4. Schedule Summary (required)

► Total number of pages including this cover page: \_\_\_\_\_

Schedules attached

- Schedule A-1 - Investments – schedule attached  Schedule C - Income, Loans, & Business Positions – schedule attached
- Schedule A-2 - Investments – schedule attached  Schedule D - Income – Gifts – schedule attached
- Schedule B - Real Property – schedule attached  Schedule E - Income – Gifts – Travel Payments – schedule attached

-or-  None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE  
(Business or Agency Address Recommended - Public Document)



I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 02022023  
(month, day, year)

Signature Jonathan Butler  
(File the originally signed paper statement with your filing official.)

Digitally signed by Jonathan Butler  
Date: 2023.02.02 12:34:12 -08'00'

# SCHEDULE A-1

## Investments

### Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Investments must be itemized.

Do not attach brokerage or financial statements.

Name

Jonathan Butler

▶ NAME OF BUSINESS ENTITY

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GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE

\$2,000 - \$10,000       \$10,001 - \$100,000  
 \$100,001 - \$1,000,000       Over \$1,000,000

NATURE OF INVESTMENT

Stock       Other \_\_\_\_\_  
(Describe)

Partnership     Income Received of \$0 - \$499  
                          Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/22      \_\_\_\_/\_\_\_\_/22  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY

---

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE

\$2,000 - \$10,000       \$10,001 - \$100,000  
 \$100,001 - \$1,000,000       Over \$1,000,000

NATURE OF INVESTMENT

Stock       Other \_\_\_\_\_  
(Describe)

Partnership     Income Received of \$0 - \$499  
                          Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/22      \_\_\_\_/\_\_\_\_/22  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY

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GENERAL DESCRIPTION OF THIS BUSINESS

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FAIR MARKET VALUE

\$2,000 - \$10,000       \$10,001 - \$100,000  
 \$100,001 - \$1,000,000       Over \$1,000,000

NATURE OF INVESTMENT

Stock       Other \_\_\_\_\_  
(Describe)

Partnership     Income Received of \$0 - \$499  
                          Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/22      \_\_\_\_/\_\_\_\_/22  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY

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GENERAL DESCRIPTION OF THIS BUSINESS

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FAIR MARKET VALUE

\$2,000 - \$10,000       \$10,001 - \$100,000  
 \$100,001 - \$1,000,000       Over \$1,000,000

NATURE OF INVESTMENT

Stock       Other \_\_\_\_\_  
(Describe)

Partnership     Income Received of \$0 - \$499  
                          Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/22      \_\_\_\_/\_\_\_\_/22  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY

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GENERAL DESCRIPTION OF THIS BUSINESS

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FAIR MARKET VALUE

\$2,000 - \$10,000       \$10,001 - \$100,000  
 \$100,001 - \$1,000,000       Over \$1,000,000

NATURE OF INVESTMENT

Stock       Other \_\_\_\_\_  
(Describe)

Partnership     Income Received of \$0 - \$499  
                          Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/22      \_\_\_\_/\_\_\_\_/22  
ACQUIRED                  DISPOSED

▶ NAME OF BUSINESS ENTITY

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GENERAL DESCRIPTION OF THIS BUSINESS

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FAIR MARKET VALUE

\$2,000 - \$10,000       \$10,001 - \$100,000  
 \$100,001 - \$1,000,000       Over \$1,000,000

NATURE OF INVESTMENT

Stock       Other \_\_\_\_\_  
(Describe)

Partnership     Income Received of \$0 - \$499  
                          Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:

\_\_\_\_/\_\_\_\_/22      \_\_\_\_/\_\_\_\_/22  
ACQUIRED                  DISPOSED

Comments: \_\_\_\_\_

## Instructions – Schedules A-1 and A-2 Investments

“Investment” means a financial interest in any business entity (including a consulting business or other independent contracting business) that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency’s jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more at any time during the reporting period. (See Reference Pamphlet, page 13.)

### Reportable investments include:

- Stocks, bonds, warrants, and options, including those held in margin or brokerage accounts and managed investment funds (See Reference Pamphlet, page 13.)
- Sole proprietorships
- Your own business or your spouse’s or registered domestic partner’s business (See Reference Pamphlet, page 8, for the definition of “business entity.”)
- Your spouse’s or registered domestic partner’s investments even if they are legally separate property
- Partnerships (e.g., a law firm or family farm)
- Investments in reportable business entities held in a retirement account (See Reference Pamphlet, page 15.)
- If you, your spouse or registered domestic partner, and dependent children together had a 10% or greater ownership interest in a business entity or trust (including a living trust), you must disclose investments held by the business entity or trust. (See Reference Pamphlet, page 16, for more information on disclosing trusts.)
- Business trusts

### You are not required to disclose:

- Government bonds, diversified mutual funds, certain funds similar to diversified mutual funds (such as exchange traded funds) and investments held in certain retirement accounts. (See Reference Pamphlet, page 13.) (Regulation 18237)
- Bank accounts, savings accounts, money market accounts and certificates of deposits
- Cryptocurrency
- Insurance policies
- Annuities
- Commodities
- Shares in a credit union
- Government bonds (including municipal bonds)

### Reminders

- Do you know your agency’s jurisdiction?
- Did you hold investments at any time during the period covered by this statement?
- Code filers – your disclosure categories may only require disclosure of specific investments.

- Retirement accounts invested in non-reportable interests (e.g., insurance policies, mutual funds, or government bonds) (See Reference Pamphlet, page 15.)
- Government defined-benefit pension plans (such as CalPERS and CalSTRS plans)
- Certain interests held in a blind trust (See Reference Pamphlet, page 16.)

**Use Schedule A-1** to report ownership of less than 10% (e.g., stock). Schedule C (Income) may also be required if the investment is not a stock or corporate bond. (See second example below.)

**Use Schedule A-2** to report ownership of 10% or greater (e.g., a sole proprietorship).

### To Complete Schedule A-1:

Do not attach brokerage or financial statements.

- Disclose the name of the business entity. Do not use acronyms for the name of the business entity.
- Provide a general description of the business activity of the entity (e.g., pharmaceuticals, computers, automobile manufacturing, or communications).
- Check the box indicating the highest fair market value of your investment during the reporting period. If you are filing a candidate or an assuming office statement, indicate the fair market value on the filing date or the date you took office, respectively. (See page 20 for more information.)
- Identify the nature of your investment (e.g., stocks, warrants, options, or bonds).
- An acquired or disposed of date is only required if you initially acquired or entirely disposed of the investment interest during the reporting period. The date of a stock dividend reinvestment or partial disposal is not required. Generally, these dates will not apply if you are filing a candidate or an assuming office statement.

Examples:

Frank Byrd holds a state agency position. Frank’s conflict of interest code requires full disclosure of investments. Frank must disclose stock holdings of \$2,000 or more in any company that is located in or does business in California, as well as those stocks held by Frank’s spouse or registered domestic partner and dependent children.

Alice Lance is a city council member. Alice has a 4% interest, worth \$5,000, in a limited partnership located in the city. Alice must disclose the partnership on Schedule A-1 and income of \$500 or more received from the partnership on Schedule C.

# SCHEDULE A-2

## Investments, Income, and Assets of Business Entities/Trusts

(Ownership Interest is 10% or Greater)

**CALIFORNIA FORM 700**  
FAIR POLITICAL PRACTICES COMMISSION

Name  
Jonathan Butler

**▶ 1. BUSINESS ENTITY OR TRUST**

Name \_\_\_\_\_

Address (Business Address Acceptable) \_\_\_\_\_

Check one  
 Trust, go to 2     Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

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FAIR MARKET VALUE                      IF APPLICABLE, LIST DATE:

<input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/22 ACQUIRED                 </td> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/22 DISPOSED                 </td> </tr> </table>	<input type="checkbox"/> ____/____/22 ACQUIRED	<input type="checkbox"/> ____/____/22 DISPOSED
<input type="checkbox"/> ____/____/22 ACQUIRED	<input type="checkbox"/> ____/____/22 DISPOSED		

NATURE OF INVESTMENT  
 Partnership     Sole Proprietorship     \_\_\_\_\_ Other

YOUR BUSINESS POSITION \_\_\_\_\_

**▶ 1. BUSINESS ENTITY OR TRUST**

Name \_\_\_\_\_

Address (Business Address Acceptable) \_\_\_\_\_

Check one  
 Trust, go to 2     Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF THIS BUSINESS

---

FAIR MARKET VALUE                      IF APPLICABLE, LIST DATE:

<input type="checkbox"/> \$0 - \$1,999 <input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/22 ACQUIRED                 </td> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/22 DISPOSED                 </td> </tr> </table>	<input type="checkbox"/> ____/____/22 ACQUIRED	<input type="checkbox"/> ____/____/22 DISPOSED
<input type="checkbox"/> ____/____/22 ACQUIRED	<input type="checkbox"/> ____/____/22 DISPOSED		

NATURE OF INVESTMENT  
 Partnership     Sole Proprietorship     \_\_\_\_\_ Other

YOUR BUSINESS POSITION \_\_\_\_\_

**▶ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)**

<input type="checkbox"/> \$0 - \$499	<input type="checkbox"/> \$10,001 - \$100,000
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> OVER \$100,000
<input type="checkbox"/> \$1,001 - \$10,000	

**▶ 2. IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)**

<input type="checkbox"/> \$0 - \$499	<input type="checkbox"/> \$10,001 - \$100,000
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> OVER \$100,000
<input type="checkbox"/> \$1,001 - \$10,000	

**▶ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)**

None    or     Names listed below

**▶ 3. LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary.)**

None    or     Names listed below

**▶ 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST**

Check one box:  
 INVESTMENT     REAL PROPERTY

Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property \_\_\_\_\_

Description of Business Activity or City or Other Precise Location of Real Property \_\_\_\_\_

FAIR MARKET VALUE                      IF APPLICABLE, LIST DATE:

<input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/22 ACQUIRED                 </td> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/22 DISPOSED                 </td> </tr> </table>	<input type="checkbox"/> ____/____/22 ACQUIRED	<input type="checkbox"/> ____/____/22 DISPOSED
<input type="checkbox"/> ____/____/22 ACQUIRED	<input type="checkbox"/> ____/____/22 DISPOSED		

NATURE OF INTEREST  
 Property Ownership/Deed of Trust     Stock     Partnership

Leasehold \_\_\_\_\_ Yrs. remaining     Other \_\_\_\_\_

Check box if additional schedules reporting investments or real property are attached

**▶ 4. INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST**

Check one box:  
 INVESTMENT     REAL PROPERTY

Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property \_\_\_\_\_

Description of Business Activity or City or Other Precise Location of Real Property \_\_\_\_\_

FAIR MARKET VALUE                      IF APPLICABLE, LIST DATE:

<input type="checkbox"/> \$2,000 - \$10,000 <input type="checkbox"/> \$10,001 - \$100,000 <input type="checkbox"/> \$100,001 - \$1,000,000 <input type="checkbox"/> Over \$1,000,000	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/22 ACQUIRED                 </td> <td style="width: 50%; text-align: center;"> <input type="checkbox"/> ____/____/22 DISPOSED                 </td> </tr> </table>	<input type="checkbox"/> ____/____/22 ACQUIRED	<input type="checkbox"/> ____/____/22 DISPOSED
<input type="checkbox"/> ____/____/22 ACQUIRED	<input type="checkbox"/> ____/____/22 DISPOSED		

NATURE OF INTEREST  
 Property Ownership/Deed of Trust     Stock     Partnership

Leasehold \_\_\_\_\_ Yrs. remaining     Other \_\_\_\_\_

Check box if additional schedules reporting investments or real property are attached

**Comments:** \_\_\_\_\_

## Instructions – Schedule A-2 Investments, Income, and Assets of Business Entities/Trusts

Use Schedule A-2 to report investments in a business entity (including a consulting business or other independent contracting business) or trust (including a living trust) in which you, your spouse or registered domestic partner, and your dependent children, together or separately, had a 10% or greater interest, totaling \$2,000 or more, during the reporting period and which is located in, doing business in, planning to do business in, or which has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) A trust located outside your agency's jurisdiction is reportable if it holds assets that are located in or doing business in the jurisdiction. Do not report a trust that contains non-reportable interests. For example, a trust containing only your personal residence not used in whole or in part as a business, your savings account, and some municipal bonds, is not reportable.

Also report on Schedule A-2 investments and real property held by that entity or trust if your pro rata share of the investment or real property interest was \$2,000 or more during the reporting period.

### To Complete Schedule A-2:

**Part 1.** Disclose the name and address of the business entity or trust. If you are reporting an interest in a business entity, check "Business Entity" and complete the box as follows:

- Provide a general description of the business activity of the entity.
- Check the box indicating the highest fair market value of your investment during the reporting period.
- If you initially acquired or entirely disposed of this interest during the reporting period, enter the date acquired or disposed.
- Identify the nature of your investment.
- Disclose the job title or business position you held with the entity, if any (i.e., if you were a director, officer, partner, trustee, employee, or held any position of management). A business position held by your spouse is not reportable.

**Part 2.** Check the box indicating **your pro rata** share of the **gross** income received **by** the business entity or trust. This amount includes your pro rata share of the **gross** income **from** the business entity or trust, as well as your community property interest in your spouse's or registered domestic partner's share. Gross income is the total amount of income before deducting expenses, losses, or taxes.

**Part 3.** Disclose the name of each source of income that is located in, doing business in, planning to do business in, or that has done business during the previous two years in your agency's jurisdiction, as follows:

- Disclose each source of income and outstanding loan **to the business entity or trust** identified in Part 1 if your pro rata share of the **gross** income (including your community property interest in your spouse's or registered domestic partner's share) to the business entity or trust from that source was \$10,000 or more during the reporting period. (See Reference Pamphlet, page 11, for examples.) Income from governmental sources may be reportable if not considered salary. See Regulation 18232. Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.
- Disclose each individual or entity that was a source of commission income of \$10,000 or more during the reporting period through the business entity identified in Part 1. (See Reference Pamphlet, page 8.)

You may be required to disclose sources of income located outside your jurisdiction. For example, you may have a client who resides outside your jurisdiction who does business on a regular basis with you. Such a client, if a reportable source of \$10,000 or more, must be disclosed.

Mark "None" if you do not have any reportable \$10,000 sources of income to disclose. Phrases such as "various clients" or "not disclosing sources pursuant to attorney-client privilege" are not adequate disclosure. (See Reference Pamphlet, page 14, for information on procedures to request an exemption from disclosing privileged information.)

**Part 4.** Report any investments or interests in real property held or leased **by the entity or trust** identified in Part 1 if your pro rata share of the interest held was \$2,000 or more during the reporting period. Attach additional schedules or use FPPC's Form 700 Excel spreadsheet if needed.

- Check the applicable box identifying the interest held as real property or an investment.
- If investment, provide the name and description of the business entity.
- If real property, report the precise location (e.g., an assessor's parcel number or address).
- Check the box indicating the highest fair market value of your interest in the real property or investment during the reporting period. (Report the fair market value of the portion of your residence claimed as a tax deduction if you are utilizing your residence for business purposes.)
- Identify the nature of your interest.
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property or investment during the reporting period.



## Instructions – Schedule B Interests in Real Property

Report interests in real property located in your agency's jurisdiction in which you, your spouse or registered domestic partner, or your dependent children had a direct, indirect, or beneficial interest totaling \$2,000 or more any time during the reporting period. Real property is also considered to be "within the jurisdiction" of a local government agency if the property or any part of it is located within two miles outside the boundaries of the jurisdiction or within two miles of any land owned or used by the local government agency. (See Reference Pamphlet, page 13.)

### Interests in real property include:

- An ownership interest (including a beneficial ownership interest)
- A deed of trust, easement, or option to acquire property
- A leasehold interest (See Reference Pamphlet, page 14.)
- A mining lease
- An interest in real property held in a retirement account (See Reference Pamphlet, page 15.)
- An interest in real property held by a business entity or trust in which you, your spouse or registered domestic partner, and your dependent children together had a 10% or greater ownership interest (Report on Schedule A-2.)
- Your spouse's or registered domestic partner's interests in real property that are legally held separately by him or her

### You are not required to report:

- A residence, such as a home or vacation cabin, used exclusively as a personal residence (However, a residence in which you rent out a room or for which you claim a business deduction may be reportable. If reportable, report the fair market value of the portion claimed as a tax deduction.)
- Some interests in real property held through a blind trust (See Reference Pamphlet, page 16.)
  - **Please note:** A non-reportable property can still be grounds for a conflict of interest and may be disqualifying.

### To Complete Schedule B:

- Report the precise location (e.g., an assessor's parcel number or address) of the real property.
- Check the box indicating the fair market value of your interest in the property (regardless of what you owe on the property).
- Enter the date acquired or disposed only if you initially acquired or entirely disposed of your interest in the property during the reporting period.
- Identify the nature of your interest. If it is a leasehold,

### Reminders

- Income and loans already reported on Schedule B are not also required to be reported on Schedule C.
- Real property already reported on Schedule A-2, Part 4 is not also required to be reported on Schedule B.
- Code filers – do your disclosure categories require disclosure of real property?

disclose the number of years remaining on the lease.

- If you received rental income, check the box indicating the gross amount you received.
- If you had a 10% or greater interest in real property and received rental income, list the name of the source(s) if your pro rata share of the gross income from any single tenant was \$10,000 or more during the reporting period. If you received a total of \$10,000 or more from two or more tenants acting in concert (in most cases, this will apply to married couples), disclose the name of each tenant. Otherwise, mark "None."
- Loans from a private lender that total \$500 or more and are secured by real property may be reportable. **Loans from commercial lending institutions made in the lender's regular course of business on terms available to members of the public without regard to your official status are not reportable.**

When reporting a loan:

- Provide the name and address of the lender.
- Describe the lender's business activity.
- Disclose the interest rate and term of the loan. For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period. The term of a loan is the total number of months or years given for repayment of the loan at the time the loan was established.
- Check the box indicating the highest balance of the loan during the reporting period.
- Identify a guarantor, if applicable.

If you have more than one reportable loan on a single piece of real property, report the additional loan(s) on Schedule C.

### Example:

Allison Gande is a city planning commissioner. During the reporting period, Allison received rental income of \$12,000, from a single tenant who rented property owned in the city's jurisdiction. If Allison received \$6,000 each from two tenants, the tenants' names would not be required because no single tenant paid her \$10,000 or more. A married couple is considered a single tenant.

ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS 4600 24th Street	
CITY Sacramento	
FAIR MARKET VALUE	IF APPLICABLE, LIST DATE
<input type="checkbox"/> \$2,000 - \$10,000	<input type="checkbox"/> / / XX
<input type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> ACQUIRED
<input checked="" type="checkbox"/> \$100,001 - \$1,000,000	<input type="checkbox"/> DISPOSED
<input type="checkbox"/> Over \$1,000,000	
NATURE OF INTEREST	
<input type="checkbox"/> Ownership/Deed of Trust	<input type="checkbox"/> Easement
<input type="checkbox"/> Leasehold	<input type="checkbox"/> Other
IF RENTAL PROPERTY, GROSS INCOME RECEIVED	
<input type="checkbox"/> \$0 - \$499	<input type="checkbox"/> \$500 - \$1,000
<input type="checkbox"/> \$1,001 - \$10,000	<input type="checkbox"/> \$10,001 - \$100,000
<input checked="" type="checkbox"/> \$100,001 - \$1,000,000	<input type="checkbox"/> OVER \$100,000
SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.	
<input type="checkbox"/> None	
Henry Wells	
NAME OF LENDER*	
Sophia Petroillo	
ADDRESS (Business Address Acceptable)	
2121 Blue Sky Parkway, Sacramento	
BUSINESS ACTIVITY, IF ANY, OF LENDER	
Restaurant Owner	
INTEREST RATE	TERM (Months/Years)
8 % <input type="checkbox"/> None	15 Years
HIGHEST BALANCE DURING REPORTING PERIOD	
<input type="checkbox"/> \$500 - \$1,000	<input type="checkbox"/> \$1,001 - \$10,000
<input checked="" type="checkbox"/> \$10,001 - \$100,000	<input type="checkbox"/> OVER \$100,000
<input type="checkbox"/> Guarantor, if applicable	
Comments:	

# SCHEDULE C

## Income, Loans, & Business Positions

(Other than Gifts and Travel Payments)

**CALIFORNIA FORM 700**

FAIR POLITICAL PRACTICES COMMISSION

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Name

Jonathan Butler

▶ 1. INCOME RECEIVED	▶ 1. INCOME RECEIVED
<p>NAME OF SOURCE OF INCOME <u>SF Students' Back on Track</u></p> <p>ADDRESS <i>(Business Address Acceptable)</i> <u>1399 McAllister Street</u></p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE <u>After-school tutoring program</u></p> <p>YOUR BUSINESS POSITION <u>Executive Director</u></p> <p>GROSS INCOME RECEIVED    <input type="checkbox"/> No Income - Business Position Only</p> <p><input type="checkbox"/> \$500 - \$1,000                      <input type="checkbox"/> \$1,001 - \$10,000</p> <p><input checked="" type="checkbox"/> \$10,001 - \$100,000              <input type="checkbox"/> OVER \$100,000</p> <p>CONSIDERATION FOR WHICH INCOME WAS RECEIVED</p> <p><input checked="" type="checkbox"/> Salary    <input type="checkbox"/> Spouse's or registered domestic partner's income <i>(For self-employed use Schedule A-2.)</i></p> <p><input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)</p> <p><input type="checkbox"/> Sale of _____ <i>(Real property, car, boat, etc.)</i></p> <p><input type="checkbox"/> Loan repayment</p> <p><input type="checkbox"/> Commission or    <input type="checkbox"/> Rental Income, <i>list each source of \$10,000 or more</i></p> <p>_____ <i>(Describe)</i></p> <p><input type="checkbox"/> Other _____ <i>(Describe)</i></p>	<p>NAME OF SOURCE OF INCOME <u>SF Public Health Foundation</u></p> <p>ADDRESS <i>(Business Address Acceptable)</i> <u>1Hallidie Plz, Ste 808</u></p> <p>BUSINESS ACTIVITY, IF ANY, OF SOURCE <u>Faith-based health coalition</u></p> <p>YOUR BUSINESS POSITION <u>ED - San Francisco African American Faith Coalition</u></p> <p>GROSS INCOME RECEIVED    <input type="checkbox"/> No Income - Business Position Only</p> <p><input type="checkbox"/> \$500 - \$1,000                      <input type="checkbox"/> \$1,001 - \$10,000</p> <p><input checked="" type="checkbox"/> \$10,001 - \$100,000              <input type="checkbox"/> OVER \$100,000</p> <p>CONSIDERATION FOR WHICH INCOME WAS RECEIVED</p> <p><input checked="" type="checkbox"/> Salary    <input type="checkbox"/> Spouse's or registered domestic partner's income <i>(For self-employed use Schedule A-2.)</i></p> <p><input type="checkbox"/> Partnership (Less than 10% ownership. For 10% or greater use Schedule A-2.)</p> <p><input type="checkbox"/> Sale of _____ <i>(Real property, car, boat, etc.)</i></p> <p><input type="checkbox"/> Loan repayment</p> <p><input type="checkbox"/> Commission or    <input type="checkbox"/> Rental Income, <i>list each source of \$10,000 or more</i></p> <p>_____ <i>(Describe)</i></p> <p><input type="checkbox"/> Other _____ <i>(Describe)</i></p>

**▶ 2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD**

\* You are not required to report loans from a commercial lending institution, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

<p>NAME OF LENDER* _____</p> <p>ADDRESS <i>(Business Address Acceptable)</i> _____</p> <p>BUSINESS ACTIVITY, IF ANY, OF LENDER _____</p> <p>HIGHEST BALANCE DURING REPORTING PERIOD</p> <p><input type="checkbox"/> \$500 - \$1,000</p> <p><input type="checkbox"/> \$1,001 - \$10,000</p> <p><input type="checkbox"/> \$10,001 - \$100,000</p> <p><input type="checkbox"/> OVER \$100,000</p>	<p>INTEREST RATE                      TERM (Months/Years)</p> <p>_____ %    <input type="checkbox"/> None    _____</p> <p>SECURITY FOR LOAN</p> <p><input type="checkbox"/> None                      <input type="checkbox"/> Personal residence</p> <p><input type="checkbox"/> Real Property _____ <span style="margin-left: 150px;"><i>Street address</i></span></p> <p>_____ <i>City</i></p> <p><input type="checkbox"/> Guarantor _____</p> <p><input type="checkbox"/> Other _____ <span style="margin-left: 150px;"><i>(Describe)</i></span></p>
--	--

**Comments:** \_\_\_\_\_

# Instructions – Schedule C

## Income, Loans, & Business Positions

### (Income Other Than Gifts and Travel Payments)

#### Reporting Income:

Report the source and amount of gross income of \$500 or more you received during the reporting period. Gross income is the total amount of income before deducting expenses, losses, or taxes and includes loans other than loans from a commercial lending institution. (See Reference Pamphlet, page 11.) You must also report the source of income to your spouse or registered domestic partner if your community property share was \$500 or more during the reporting period.

The source and income must be reported only if the source is located in, doing business in, planning to do business in, or has done business during the previous two years in your agency's jurisdiction. (See Reference Pamphlet, page 13.) Reportable sources of income may be further limited by your disclosure category located in your agency's conflict of interest code.

#### Reporting Business Positions:

You must report your job title with each reportable business entity even if you received no income during the reporting period. Use the comments section to indicate that no income was received.

#### Commonly reportable income and loans include:

- Salary/wages, per diem, and reimbursement for expenses including travel payments provided by your employer
- Community property interest (50%) in your spouse's or registered domestic partner's income - **report the employer's name and all other required information**
- Income from investment interests, such as partnerships, reported on Schedule A-1
- Commission income not required to be reported on Schedule A-2 (See Reference Pamphlet, page 8.)
- Gross income from any sale, including the sale of a house or car (Report your pro rata share of the total sale price.)
- Rental income not required to be reported on Schedule B
- Prizes or awards not disclosed as gifts
- Payments received on loans you made to others
- An honorarium received prior to becoming a public official (See Reference Pamphlet, page 10.)
- Incentive compensation (See Reference Pamphlet, page 12.)

#### Reminders

- Code filers – your disclosure categories may not require disclosure of all sources of income.
- If you or your spouse or registered domestic partner are self-employed, report the business entity on Schedule A-2.
- Do not disclose on Schedule C income, loans, or business positions already reported on Schedules A-2 or B.

#### You are not required to report:

- Salary, reimbursement for expenses or per diem, or social security, disability, or other similar benefit payments received by you or your spouse or registered domestic partner from a federal, state, or local government agency.
- Stock dividends and income from the sale of stock unless the source can be identified.
- Income from a PERS retirement account.

(See Reference Pamphlet, page 12.)

#### To Complete Schedule C:

##### Part 1. Income Received/Business Position Disclosure

- Disclose the name and address of each source of income or each business entity with which you held a business position.
- Provide a general description of the business activity if the source is a business entity.
- Check the box indicating the amount of gross income received.
- Identify the consideration for which the income was received.
- For income from commission sales, check the box indicating the gross income received and list the name of each source of commission income of \$10,000 or more. (See Reference Pamphlet, page 8.) **Note: If you receive commission income on a regular basis or have an ownership interest of 10% or more, you must disclose the business entity and the income on Schedule A-2.**
- Disclose the job title or business position, if any, that you held with the business entity, even if you did not receive income during the reporting period.

##### Part 2. Loans Received or Outstanding During the Reporting Period

- Provide the name and address of the lender.
- Provide a general description of the business activity if the lender is a business entity.
- Check the box indicating the highest balance of the loan during the reporting period.
- Disclose the interest rate and the term of the loan.
  - For variable interest rate loans, disclose the conditions of the loan (e.g., Prime + 2) or the average interest rate paid during the reporting period.
  - The term of the loan is the total number of months or years given for repayment of the loan at the time the loan was entered into.
- Identify the security, if any, for the loan.

**SCHEDULE D**  
**Income – Gifts**

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____
___/___/___	\$ _____	_____

Comments: \_\_\_\_\_

## Instructions – Schedule D Income – Gifts

A gift is anything of value for which you have not provided equal or greater consideration to the donor. A gift is reportable if its fair market value is \$50 or more. In addition, multiple gifts totaling \$50 or more received during the reporting period from a single source must be reported.

It is the acceptance of a gift, not the ultimate use to which it is put, that imposes your reporting obligation. Except as noted below, you must report a gift even if you never used it or if you gave it away to another person.

If the exact amount of a gift is unknown, you must make a good faith estimate of the item's fair market value. Listing the value of a gift as "over \$50" or "value unknown" is not adequate disclosure. In addition, if you received a gift through an intermediary, you must disclose the name, address, and business activity of both the donor and the intermediary. You may indicate an intermediary either in the "source" field after the name or in the "comments" section at the bottom of Schedule D.

### Commonly reportable gifts include:

- Tickets/passes to sporting or entertainment events
- Tickets/passes to amusement parks
- Parking passes not used for official agency business
- Food, beverages, and accommodations, including those provided in direct connection with your attendance at a convention, conference, meeting, social event, meal, or like gathering
- Rebates/discounts not made in the regular course of business to members of the public without regard to official status
- Wedding gifts (See Reference Pamphlet, page 16)
- An honorarium received prior to assuming office (You may report an honorarium as income on Schedule C, rather than as a gift on Schedule D, if you provided services of equal or greater value than the payment received. See Reference Pamphlet, page 10.)
- Transportation and lodging (See Schedule E.)
- Forgiveness of a loan received by you

### Reminders

- Gifts from a single source are subject to a \$520 limit in 2022. (See Reference Pamphlet, page 10.)
- Code filers – you only need to report gifts from reportable sources.

### Gift Tracking Mobile Application

- FPPC has created a gift tracking app for mobile devices that helps filers track gifts and provides a quick and easy way to upload the information to the Form 700. Visit FPPC's website to download the app.

### You are not required to disclose:

- Gifts that were not used and that, within 30 days after receipt, were returned to the donor or delivered to a charitable organization or government agency without being claimed by you as a charitable contribution for tax purposes
- Gifts from your spouse or registered domestic partner, child, parent, grandparent, grandchild, brother, sister, and certain other family members (See Regulation 18942 for a complete list.). The exception does not apply if the donor was acting as an agent or intermediary for a reportable source who was the true donor.
- Gifts of similar value exchanged between you and an individual, other than a lobbyist registered to lobby your state agency, on holidays, birthdays, or similar occasions
- Gifts of informational material provided to assist you in the performance of your official duties (e.g., books, pamphlets, reports, calendars, periodicals, or educational seminars)
- A monetary bequest or inheritance (However, inherited investments or real property may be reportable on other schedules.)
- Personalized plaques or trophies with an individual value of less than \$250
- Campaign contributions
- Up to two tickets, for your own use, to attend a fundraiser for a campaign committee or candidate, or to a fundraiser for an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code. The ticket must be received from the organization or committee holding the fundraiser.
- Gifts given to members of your immediate family if the source has an established relationship with the family member and there is no evidence to suggest the donor had a purpose to influence you. (See Regulation 18943.)
- Free admission, food, and nominal items (such as a pen, pencil, mouse pad, note pad or similar item) available to all attendees, at the event at which the official makes a speech (as defined in Regulation 18950(b)(2)), so long as the admission is provided by the person who organizes the event.
- Any other payment not identified above, that would otherwise meet the definition of gift, where the payment is made by an individual who is not a lobbyist registered to lobby the official's state agency, where it is clear that the gift was made because of an existing personal or business relationship unrelated to the official's position and there is no evidence whatsoever at the time the gift is made to suggest the donor had a purpose to influence you.

### To Complete Schedule D:

- Disclose the full name (not an acronym), address, and, if a business entity, the business activity of the source.
- Provide the date (month, day, and year) of receipt, and disclose the fair market value and description of the gift.

**SCHEDULE E**  
**Income – Gifts**  
**Travel Payments, Advances,**  
**and Reimbursements**

Name  
Jonathan Butler

- Mark either the gift or income box.
- Mark the “501(c)(3)” box for a travel payment received from a nonprofit 501(c)(3) organization or the “Speech” box if you made a speech or participated in a panel. Per Government Code Section 89506, these payments may not be subject to the gift limit. However, they may result in a disqualifying conflict of interest.
- For gifts of travel, provide the travel destination.

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): \_\_\_/\_\_\_/\_\_\_ - \_\_\_/\_\_\_/\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

▶ MUST CHECK ONE:  Gift **-or-**  Income

Made a Speech/Participated in a Panel

Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): \_\_\_/\_\_\_/\_\_\_ - \_\_\_/\_\_\_/\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

▶ MUST CHECK ONE:  Gift **-or-**  Income

Made a Speech/Participated in a Panel

Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): \_\_\_/\_\_\_/\_\_\_ - \_\_\_/\_\_\_/\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

▶ MUST CHECK ONE:  Gift **-or-**  Income

Made a Speech/Participated in a Panel

Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

▶ NAME OF SOURCE *(Not an Acronym)*

ADDRESS *(Business Address Acceptable)*

CITY AND STATE

501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE(S): \_\_\_/\_\_\_/\_\_\_ - \_\_\_/\_\_\_/\_\_\_ AMT: \$ \_\_\_\_\_  
*(If gift)*

▶ MUST CHECK ONE:  Gift **-or-**  Income

Made a Speech/Participated in a Panel

Other - Provide Description \_\_\_\_\_

▶ If Gift, Provide Travel Destination \_\_\_\_\_

Comments: \_\_\_\_\_

# Instructions – Schedule E Travel Payments, Advances, and Reimbursements

Travel payments reportable on Schedule E include advances and reimbursements for travel and related expenses, including lodging and meals.

Gifts of travel may be subject to the gift limit. In addition, certain travel payments are reportable gifts, but are not subject to the gift limit. To avoid possible misinterpretation or the perception that you have received a gift in excess of the gift limit, you may wish to provide a specific description of the purpose of your travel. (See the FPPC fact sheet entitled “Limitations and Restrictions on Gifts, Honoraria, Travel, and Loans” to read about travel payments under section 89506(a).)

**You are not required to disclose:**

- Travel payments received from any state, local, or federal government agency for which you provided services equal or greater in value than the payments received, such as reimbursement for travel on agency business from your government agency employer.
- A payment for travel from another local, state, or federal government agency and related per diem expenses when the travel is for education, training or other inter-agency programs or purposes.
- Travel payments received from your employer in the normal course of your employment that are included in the income reported on Schedule C.
- A travel payment that was received from a nonprofit entity exempt from taxation under Internal Revenue Code Section 501(c)(3) for which you provided equal or greater consideration, such as reimbursement for travel on business for a 501(c)(3) organization for which you are a board member.

**Note: Certain travel payments may not be reportable if reported via email on Form 801 by your agency.**

**To Complete Schedule E:**

- Disclose the full name (not an acronym) and address of the source of the travel payment.
- Identify the business activity if the source is a business entity.
- Check the box to identify the payment as a gift or income, report the amount, and disclose the date(s).
  - **Travel payments are gifts** if you did not provide services that were equal to or greater in value than the payments received. You must disclose gifts totaling \$500 or more from a single source during the period covered by the statement.

When reporting travel payments that are gifts, you must provide a description of the gift, the **date(s)** received, and the **travel destination**.

- **Travel payments are income** if you provided services that were equal to or greater in value than the

payments received. You must disclose income totaling \$500 or more from a single source during the period covered by the statement. You have the burden of proving the payments are income rather than gifts. When reporting travel payments as income, you must describe the services you provided in exchange for the payment. You are not required to disclose the date(s) for travel payments that are income.

**Example:**

City council member MaryClaire Chandler is the chair of a 501(c)(6) trade association, and the association pays for MaryClaire's travel to attend its meetings. Because MaryClaire is deemed to be providing equal or greater consideration for the travel payment by virtue of serving on the board, this payment may be reported as income. Payments for MaryClaire to attend other events for which they are not providing services are likely considered gifts.

▶ NAME OF SOURCE (Not an Acronym)	
Health Services Trade Association	
ADDRESS (Business Address Acceptable)	
1230 K Street, Suite 610	
CITY AND STATE	
Sacramento, CA	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
Association of Healthcare Workers	
DATE(S):	AMT: \$ 550.00
(if gift)	
▶ MUST CHECK ONE: <input type="checkbox"/> Gift -or- <input checked="" type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description <u>Travel reimbursement for board meeting.</u>	
▶ If Gift, Provide Travel Destination _____	

Note that the same payment from a 501(c)(3) would NOT be reportable.

**Example:**

Mayor Kim travels to China on a trip organized by China Silicon Valley Business Development, a California nonprofit, 501(c)(6) organization. The Chengdu Municipal People's Government pays for Mayor Kim's airfare and travel costs, as well as meals and lodging during the trip. The trip's agenda shows that the trip's purpose is to promote job creation and economic activity in China and in Silicon Valley, so the trip is reasonably related to a governmental purpose.

▶ NAME OF SOURCE (Not an Acronym)	
Chengdu Municipal People's Government	
ADDRESS (Business Address Acceptable)	
2 Caoshi St, CaoShiJie, Qingyang Qu, Chengdu Shi,	
CITY AND STATE	
Sichuan Sheng, China, 610000	
<input type="checkbox"/> 501 (c)(3) or DESCRIBE BUSINESS ACTIVITY, IF ANY, OF SOURCE	
DATE(S):	AMT: \$ 3,874.38
(if gift)	
▶ MUST CHECK ONE: <input checked="" type="checkbox"/> Gift -or- <input type="checkbox"/> Income	
<input type="radio"/> Made a Speech/Participated in a Panel	
<input checked="" type="radio"/> Other - Provide Description: <u>Travel reimbursement for trip to China.</u>	
▶ If Gift, Provide Travel Destination <u>Sichuan Sheng, China</u>	

Thus, Mayor Kim must report the gift of travel, but the gift is exempt from the gift limit. In this case, the travel payments are not subject to the gift limit because the source is a foreign government and because the travel is reasonably related to a governmental purpose. (Section 89506(a)(2).) Note that Mayor Kim could be disqualified from participating in or making decisions about The Chengdu Municipal People's Government for 12 months. Also note that if China Silicon Valley Business Development (a 501(c)(6) organization) paid for the travel costs rather than the governmental organization, the payments would be subject to the gift limits. (See the FPPC fact sheet, Limitations and Restrictions on Gifts, Honoraria, Travel and Loans, at [www.fppc.ca.gov](http://www.fppc.ca.gov).)

## Restrictions and Prohibitions

The Political Reform Act (Gov. Code Sections 81000-91014) requires most state and local government officials and employees to publicly disclose their economic interests including personal assets and income. The Act's conflict of interest provisions also disqualify a public official from taking part in a governmental decision if it is reasonably foreseeable that the decision will have a material financial effect on these economic interests as well as the official's personal finances and those of immediate family. (Gov. Code Sections 87100 and 87103.) The Fair Political Practices Commission (FPPC) is the state agency responsible for issuing the attached Statement of Economic Interests, Form 700, and for interpreting the Act's provisions.

### Gift Prohibition

Gifts received by most state and local officials, employees, and candidates are subject to a limit. In 2021-2022, the gift limit increased to \$520 from a single source during a calendar year.

Additionally, state officials, state candidates, and certain state employees are subject to a \$10 limit per calendar month on gifts from lobbyists and lobbying firms registered with the Secretary of State. See Reference Pamphlet, page 10.

State and local officials and employees should check with their agency to determine if other restrictions apply.

### Disqualification

Public officials are, under certain circumstances, required to disqualify themselves from making, participating in, or attempting to influence governmental decisions that will affect their economic interests. This may include interests they are not required to disclose. For example, a personal residence is often not reportable, but may be grounds for disqualification. Specific disqualification requirements apply to 87200 filers (e.g., city councilmembers, members of boards of supervisors, planning commissioners, etc.). These officials must publicly identify the economic interest that creates a conflict of interest and leave the room before a discussion or vote takes place at a public meeting. For more information, consult Government Code Section 87105, Regulation 18707, and the Guide to Recognizing Conflicts of Interest page at [www.fppc.ca.gov](http://www.fppc.ca.gov).

### Honorarium Ban

Most state and local officials, employees, and candidates are prohibited from accepting an honorarium for any speech given, article published, or attendance at a conference, convention, meeting, or like gathering. (See Reference Pamphlet, page 10.)

### Loan Restrictions

Certain state and local officials are subject to restrictions on loans. (See Reference Pamphlet, page 14.)

### Post-Governmental Employment

There are restrictions on representing clients or employers before former agencies. The provisions apply to elected state officials, most state employees, local elected officials, county chief administrative officers, city managers, including the chief administrator of a city, and general managers or chief administrators of local special districts and JPAs. The FPPC website has fact sheets explaining the provisions.

### Late Filing

The filing officer who retains originally-signed or electronically filed statements of economic interests may impose on an individual a fine for any statement that is filed late. The fine is \$10 per day up to a maximum of \$100. Late filing penalties may be reduced or waived under certain circumstances.

Persons who fail to timely file their Form 700 may be referred to the FPPC's Enforcement Division (and, in some cases, to the Attorney General or district attorney) for investigation and possible prosecution. In addition to the late filing penalties, a fine of up to \$5,000 per violation may be imposed.

**For assistance** concerning reporting, prohibitions, and restrictions under the Act:

- Email questions to [advice@fppc.ca.gov](mailto:advice@fppc.ca.gov).
- Call the FPPC toll-free at (866) 275-3772.

### Form 700 is a Public Document Public Access Must Be Provided

Statements of Economic Interests are public documents. The filing officer must permit any member of the public to inspect and receive a copy of any statement.

- Statements must be available as soon as possible during the agency's regular business hours, but in any event not later than the second business day after the statement is received. Access to the Form 700 is not subject to the Public Records Act procedures.
- No conditions may be placed on persons seeking access to the forms.
- No information or identification may be required from persons seeking access.
- Reproduction fees of no more than 10 cents per page may be charged.

## Questions and Answers

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### General

- Q. What is the reporting period for disclosing interests on an assuming office statement or a candidate statement?
- A. On an assuming office statement, disclose all reportable investments, interests in real property, and business positions held on the date you assumed office. In addition, you must disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you assumed office.

On a candidate statement, disclose all reportable investments, interests in real property, and business positions held on the date you file your declaration of candidacy. You must also disclose income (including loans, gifts and travel payments) received during the 12 months prior to the date you file your declaration of candidacy.

- Q. I hold two other board positions in addition to my position with the county. Must I file three statements of economic interests?
- A. Yes, three are required. However, you may instead complete an expanded statement listing the county and the two boards on the Cover Page or an attachment as the agencies for which you will be filing. Disclose all reportable economic interests in all three jurisdictions on the expanded statement. File the expanded statement for your primary position providing an original “wet” signature unless filed with a secure electronic signature. (See page 3 above.) File copies of the expanded statement with the other two agencies as required by Regulation 18723.1(c). Remember to complete separate statements for positions that you leave or assume during the year.
- Q. I am a department head who recently began acting as city manager. Should I file as the city manager?
- A. Yes. File an assuming office statement as city manager. Persons serving as “acting,” “interim,” or “alternate” must file as if they hold the position because they are or may be performing the duties of the position.

- Q. My spouse and I are currently separated and in the process of obtaining a divorce. Must I still report my spouse’s income, investments, and interests in real property?
- A. Yes. A public official must continue to report a spouse’s economic interests until such time as dissolution of marriage proceedings is final. However, if a separate property agreement has been reached prior to that time, your estranged spouse’s income may not have to be reported. Contact the FPPC for more information.
- Q. As a designated employee, I left one state agency to work for another state agency. Must I file a leaving office statement?
- A. Yes. You may also need to file an assuming office statement for the new agency.

### Investment Disclosure

- Q. I have an investment interest in shares of stock in a company that does not have an office in my jurisdiction. Must I still disclose my investment interest in this company?
- A. Probably. The definition of “doing business in the jurisdiction” is not limited to whether the business has an office or physical location in your jurisdiction. (See Reference Pamphlet, page 13.)
- Q. My spouse and I have a living trust. The trust holds rental property in my jurisdiction, our primary residence, and investments in diversified mutual funds. I have full disclosure. How is this trust disclosed?
- A. Disclose the name of the trust, the rental property and its income on Schedule A-2. Your primary residence and investments in diversified mutual funds registered with the SEC are not reportable.
- Q. I am required to report all investments. I have an IRA that contains stocks through an account managed by a brokerage firm. Must I disclose these stocks even though they are held in an IRA and I did not decide which stocks to purchase?
- A. Yes. Disclose on Schedule A-1 or A-2 any stock worth \$2,000 or more in a business entity located in or doing business in your jurisdiction.

## Questions and Answers Continued

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- Q. The value of my stock changed during the reporting period. How do I report the value of the stock?
- A. You are required to report the highest value that the stock reached during the reporting period. You may use your monthly statements to determine the highest value. You may also use the entity's website to determine the highest value. You are encouraged to keep a record of where you found the reported value. Note that for an assuming office statement, you must report the value of the stock on the date you assumed office.
- Q. I am the sole owner of my business, an S-Corporation. I believe that the nature of the business is such that it cannot be said to have any "fair market value" because it has no assets. I operate the corporation under an agreement with a large insurance company. My contract does not have resale value because of its nature as a personal services contract. Must I report the fair market value for my business on Schedule A-2 of the Form 700?
- A. Yes. Even if there are no *tangible* assets, intangible assets, such as relationships with companies and clients are commonly sold to qualified professionals. The "fair market value" is often quantified for other purposes, such as marital dissolutions or estate planning. In addition, the IRS presumes that "personal services corporations" have a fair market value. A professional "book of business" and the associated goodwill that generates income are not without a determinable value. The Form 700 does not require a precise fair market value; it is only necessary to check a box indicating the broad range within which the value falls.
- Q. I own stock in IBM and must report this investment on Schedule A-1. I initially purchased this stock in the early 1990s; however, I am constantly buying and selling shares. Must I note these dates in the "Acquired" and "Disposed" fields?
- A. No. You must only report dates in the "Acquired" or "Disposed" fields when, during the reporting period, you initially purchase a reportable investment worth \$2,000 or more or when you dispose of the entire investment. You are not required to track the partial trading of an investment.
- Q. On last year's filing I reported stock in Encoe valued at \$2,000 - \$10,000. Late last year the value of this stock fell below and remains at less than \$2,000. How should this be reported on this year's statement?
- A. You are not required to report an investment if the value was less than \$2,000 during the **entire** reporting period. However, because a disposed date is not required for stocks that fall below \$2,000, you may want to report the stock and note in the "comments" section that the value fell below \$2,000. This would be for informational purposes only; it is not a requirement.
- Q. We have a Section 529 account set up to save money for our son's college education. Is this reportable?
- A. If the Section 529 account contains reportable interests (e.g., common stock valued at \$2,000 or more), those interests are reportable (not the actual Section 529 account). If the account contains solely mutual funds, then nothing is reported.

### Income Disclosure

- Q. I reported a business entity on Schedule A-2. Clients of my business are located in several states. Must I report all clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2, Part 3?
- A. No, only the clients located in or doing business on a regular basis in your jurisdiction must be disclosed.
- Q. I believe I am not required to disclose the names of clients from whom my pro rata share of income is \$10,000 or more on Schedule A-2 because of their right to privacy. Is there an exception for reporting clients' names?
- A. Regulation 18740 provides a procedure for requesting an exemption to allow a client's name not to be disclosed if disclosure of the name would violate a legally recognized privilege under California or Federal law. This regulation may be obtained from our website at [www.fppc.ca.gov](http://www.fppc.ca.gov). (See Reference Pamphlet, page 14.)

## Questions and Answers Continued

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Q. I am sole owner of a private law practice that is not reportable based on my limited disclosure category. However, some of the sources of income to my law practice are from reportable sources. Do I have to disclose this income?

A. Yes, even though the law practice is not reportable, reportable sources of income to the law practice of \$10,000 or more must be disclosed. This information would be disclosed on Schedule C with a note in the “comments” section indicating that the business entity is not a reportable investment. The note would be for informational purposes only; it is not a requirement.

Q. I am the sole owner of my business. Where do I disclose my income - on Schedule A-2 or Schedule C?

A. Sources of income to a business in which you have an ownership interest of 10% or greater are disclosed on Schedule A-2. (See Reference Pamphlet, page 8.)

Q. My spouse is a partner in a four-person firm where all of their business is based on their own billings and collections from various clients. How do I report my community property interest in this business and the income generated in this manner?

A. If your spouse's investment in the firm is 10% or greater, disclose 100% of your spouse's share of the business on Schedule A-2, Part 1 and 50% of your spouse's income on Schedule A-2, Parts 2 and 3. For example, a client of your spouse's must be a source of at least \$20,000 during the reporting period before the client's name is reported.

Q. How do I disclose my spouse's or registered domestic partner's salary?

A. Report the name of the employer as a source of income on Schedule C.

Q. I am a doctor. For purposes of reporting \$10,000 sources of income on Schedule A-2, Part 3, are the patients or their insurance carriers considered sources of income?

A. If your patients exercise sufficient control by selecting you instead of other doctors, then your patients, rather than their insurance carriers, are sources of income to you. (See Reference Pamphlet, page 14.)

Q. I received a loan from my grandfather to purchase my home. Is this loan reportable?

A. No. Loans received from family members are not reportable.

Q. Many years ago, I loaned my parents several thousand dollars, which they paid back this year. Do I need to report this loan repayment on my Form 700?

A. No. Payments received on a loan made to a family member are not reportable.

### Real Property Disclosure

Q. During this reporting period we switched our principal place of residence into a rental. I have full disclosure and the property is located in my agency's jurisdiction, so it is now reportable. Because I have not reported this property before, do I need to show an “acquired” date?

A. No, you are not required to show an “acquired” date because you previously owned the property. However, you may want to note in the “comments” section that the property was not previously reported because it was used exclusively as your residence. This would be for informational purposes only; it is not a requirement.

Q. I am a city manager, and I own a rental property located in an adjacent city, but one mile from the city limit. Do I need to report this property interest?

A. Yes. You are required to report this property because it is located within 2 miles of the boundaries of the city you manage.

Q. Must I report a home that I own as a personal residence for my daughter?

A. You are not required to disclose a home used as a personal residence for a family member unless you receive income from it, such as rental income.

Q. I am a co-signer on a loan for a rental property owned by a friend. Since I am listed on the deed of trust, do I need to report my friend's property as an interest in real property on my Form 700?

A. No. Simply being a co-signer on a loan for property does not create a reportable interest in that real property.

## Questions and Answers Continued

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### Gift Disclosure

- Q. If I received a reportable gift of two tickets to a concert valued at \$100 each, but gave the tickets to a friend because I could not attend the concert, do I have any reporting obligations?
- A. Yes. Since you accepted the gift and exercised discretion and control of the use of the tickets, you must disclose the gift on Schedule D.
- Q. Julia and Jared Benson, a married couple, want to give a piece of artwork to a county supervisor. Is each spouse considered a separate source for purposes of the gift limit and disclosure?
- A. Yes, each spouse may make a gift valued at the gift limit during a calendar year. For example, during 2022 the gift limit was \$520, so the Bensons may have given the supervisor artwork valued at no more than \$1,040. The supervisor must identify Jared and Julia Benson as the sources of the gift.
- Q. I am a Form 700 filer with full disclosure. Our agency holds a holiday raffle to raise funds for a local charity. I bought \$10 worth of raffle tickets and won a gift basket valued at \$120. The gift basket was donated by Doug Brewer, a citizen in our city. At the same event, I bought raffle tickets for, and won a quilt valued at \$70. The quilt was donated by a coworker. Are these reportable gifts?
- A. Because the gift basket was donated by an outside source (not an agency employee), you have received a reportable gift valued at \$110 (the value of the basket less the consideration paid). The source of the gift is Doug Brewer and the agency is disclosed as the intermediary. Because the quilt was donated by an employee of your agency, it is not a reportable gift.
- Q. My agency is responsible for disbursing grants. An applicant (501(c)(3) organization) met with agency employees to present its application. At this meeting, the applicant provided food and beverages. Would the food and beverages be considered gifts to the employees? These employees are designated in our agency's conflict of interest code and the applicant is a reportable source of income under the code.
- A. Yes. If the value of the food and beverages consumed by any one filer, plus any other gifts received from the same source during the reporting period total \$50 or more, the food and beverages would be reported using the fair market value and would be subject to the gift limit.
- Q. I received free admission to an educational conference related to my official duties. Part of the conference fees included a round of golf. Is the value of the golf considered informational material?
- A. No. The value of personal benefits, such as golf, attendance at a concert, or sporting event, are gifts subject to reporting and limits.



## HOMELESSNESS OVERSIGHT COMMISSION (Effective May 1, 2023) Deadline to make appointments March 1st

The below listed summary of seats, term expirations and membership information shall serve as notice of **vacancies, upcoming term expirations** and information on currently held seats, appointed by the Board of Supervisors. Appointments by other bodies are listed, if available. Seat numbers listed in **bold** are open for immediate appointment. However, you are able to submit applications for all seats and your application will be maintained for one year, in the event that an unexpected vacancy or opening occurs.

### Membership and Seat Qualifications

Seat #	Appointing Authority	Seat Holder	Term Ending	Qualification
1	Mayor	Vacant	May 1, 2025	Appointed by the Mayor subject to confirmation by the Board of Supervisors within 60 days and must be held by a person who has personally experienced homelessness; four-year term.*
2	Mayor	Vacant	May 1, 2027	Appointed by the Mayor subject to confirmation by the Board of Supervisors within 60 days and with experience in providing services to or engaging in advocacy on behalf of persons experiencing homelessness; four-year term.*
3	Mayor	Vacant	May 1, 2027	Appointed by the Mayor subject to confirmation by the Board of Supervisors within 60 days and must be held by a person with expertise in mental health service delivery or substance use treatment; four-year term.*
4	Mayor	Vacant	May 1, 2025	Appointed by the Mayor subject to confirmation by the Board of Supervisors within 60 days and must be held by a person with a record of participation in a merchants' or small business association, or neighborhood association; four-year term.*

5	BOS	Vacant	May 1, 2027	Appointed by the Board of Supervisors and shall be held by a person who has personally experienced homelessness; four-year term.
6	BOS	Vacant	May 1, 2025	Appointed by the Board of Supervisors and shall be held by a person with significant experience providing services to or engaging in advocacy on behalf of persons experiencing homelessness; four-year term.
7	BOS	Vacant	May 1, 2027	Appointed by the Board of Supervisors and shall be held by a person with significant experience working with homeless families with children and/or homeless youth; four-year term.

\*At least one of the Mayor's appointees shall have experience in budgeting, finance, and auditing.

**BOARD OF SUPERVISORS (BOS) APPLICATION FORMS AVAILABLE HERE**

- English - [https://sfbos.org/sites/default/files/vacancy\\_application.pdf](https://sfbos.org/sites/default/files/vacancy_application.pdf)
- 中文 - [https://sfbos.org/sites/default/files/vacancy\\_application\\_CHI.pdf](https://sfbos.org/sites/default/files/vacancy_application_CHI.pdf)
- Español - [https://sfbos.org/sites/default/files/vacancy\\_application\\_SPA.pdf](https://sfbos.org/sites/default/files/vacancy_application_SPA.pdf)
- Filipino - [https://sfbos.org/sites/default/files/vacancy\\_application\\_FIL.pdf](https://sfbos.org/sites/default/files/vacancy_application_FIL.pdf)

(For seats appointed by other Authorities please contact the Board / Commission / Committee / Task Force (see below) or the appointing authority directly.)

Pursuant to Board of Supervisors Rules of Order 2.19 (Motion No. 05-92) all applicants applying for this body must complete and submit, with their application, a copy (**not original**) of Form 700, Statement of Economic Interests. Applications will not be considered if a copy of Form 700 is not received.

**FORM 700 AVAILABLE HERE (Required)**  
<https://www.fppc.ca.gov/Form700.html>

*Please Note: Depending upon the posting date, a vacancy may have already been filled. To determine if a vacancy for this Commission is still available, or if you require additional information, please call the Rules Committee Clerk at (415) 554-5184.*

Applications and other documents may be submitted to [BOS-Appointments@sfgov.org](mailto:BOS-Appointments@sfgov.org)

**Next Steps:** Applicants who meet minimum qualifications will be contacted by the Rules Committee Clerk once the Rules Committee Chair determines the date of the hearing. Members of the Rules Committee will consider the appointment(s) at the meeting and applicant(s) may be asked to state their qualifications. The appointment of the individual(s) who is recommended by the Rules Committee will be forwarded to the Board of Supervisors for final approval.

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The Homeless Oversight Commission shall consist of seven seats:

Seats 1-4 shall be appointed by the Mayor subject to confirmation by the Board of Supervisors:

- Seat 1 shall be held by a person who has personally experienced homelessness.
- Seat 2 shall be held by a person with significant experience providing services to or engaging in advocacy on behalf of persons experiencing homelessness.
- Seat 3 shall be held by a person with expertise in mental health service delivery or substance use treatment.
- Seat 4 shall be held by a person with a record of participation in a merchants' or small business association, or neighborhood association. In addition to the aforementioned qualifications.

At least one of the Mayor's appointees shall have experience in budgeting, finance, and auditing.

Seats 5-7 shall be appointed by the Board of Supervisors:

- Seat 5 shall be held by a person who has personally experienced homelessness.
- Seat 6 shall be held by a person with significant experience providing services to or engaging in advocacy on behalf of persons experiencing homelessness.
- Seat 7 shall be held by a person with significant experience working with homeless families with children and/or homeless youth.

The Commission shall have the following powers and duties:

(1) With respect to the Department, the Commission shall exercise all of the powers and duties of boards and commissions as set forth in Sections 4.102, 4.103, and 4.104, including but not limited to, approving applicable departmental budgets, formulating annual and long-term goals consistent with the overall objectives of the City and County, establishing departmental performance standards, holding hearings and taking testimony, conducting public education and outreach concerning programs and services for homeless persons in San Francisco, and issues concerning homelessness, and conducting performance audits of the Department to assess the efficiency and effectiveness of the Department's delivery of services to persons experiencing homelessness and persons participating in programs overseen by the Department, and the extent to which the

Department has met the annual goals and performance standards established by the Commission.

(2) Notwithstanding the Commission's authority to review and set policies, the Commission shall not have the authority to approve, disapprove, or modify criteria used to ascertain eligibility or priority for programs and/or services operated or provided by the Department, where such criteria are required as a condition of the receipt of state or federal funding.

By no later than May 1, 2023, the City shall enact an ordinance that:

(1) Amends Article XXXI of Chapter 5 of the Administrative Code, to provide that the Commission shall appoint all members of the Local Homeless Coordinating Board ("LHCB") and that the LHCB's sole duties shall be to serve as the Continuum of Care governing body and to advise the Commission on issues relating to the City's participation in the Continuum of Care program. This subsection (h)(1) shall not preclude the City by ordinance from amending said Article XXXI in a manner that is not inconsistent with this subsection or as necessary to comply with federal requirements relating to the Continuum of Care.

(2) Amends Article XII of Chapter 20 of the Administrative Code, to provide that the Shelter Monitoring Committee shall advise the Commission in lieu of advising the LHCB. This subsection (h)(2) shall not preclude the City by ordinance from amending said Article XII in a manner that is not inconsistent with this subsection.

(3) Amends Article XLI of Chapter 5 of the Administrative Code and Section 2810 of Article 28 of the Business and Tax Regulations Code, to provide that the Our City, Our Home Oversight Committee ("Oversight Committee") shall advise and make recommendations to the Commission and the Health Commission, in addition to advising and making recommendations to the Mayor and the Board of Supervisors, on administration of the Our City, Our Home Fund ("Fund") and on monies appropriated from the Fund, which monies are subject to the City budget approval process set forth in Article IX of the Charter, and to provide that the needs assessment conducted by the Oversight Committee shall inform the Department's strategic planning process. This subsection (h)(3) shall not preclude the City by ordinance from amending said Article XLI and said Section 2810 in a manner that is not inconsistent with this subsection, Section 2811 of the Business and Tax Regulations Code, and Articles XIII A and XIII C of the California Constitution, as may be amended from time to time.

(i) The references in subsection (h) to the LHCB, Shelter Monitoring Committee, and Oversight Committee do not change their character as bodies created by ordinance. Accordingly, they are not subject to provisions in the Charter or Municipal Code that apply exclusively to bodies enumerated in the Charter or created by the Charter, including but not limited to Charter Sections 4.101.1 and 4.101.5.

(j) Within one year of the effective date of the ordinance adopted by the Board of Supervisors in compliance with subsection (h), the City Attorney shall cause subsections (h)-(j) of this Section 4.133 to be removed from the Charter.

Authority: Charter Section 4.133

Sunset Date: None

Contact: TBD

Updated: February 22, 2023

# ***GENDER ANALYSIS OF COMMISSIONS AND BOARDS***

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City and County of San Francisco  
London N. Breed  
Mayor

Department on the Status of Women  
Emily M. Murase, PhD  
Director



## Acknowledgements

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The data collection and analysis for this report was conducted by Public Policy Fellow Diana McCaffrey with support from Policy and Projects Director Elizabeth Newman, Associate Director Carol Sacco, and Director Emily Murase, PhD, at the San Francisco Department on the Status of Women.

The San Francisco Department on the Status of Women would like to thank the various policy body members, Commission secretaries, and department staff who graciously assisted in collecting demographic data and providing information about their respective policy bodies.

### **San Francisco Commission on the Status of Women**

President Debbie Mesloh

Vice President Breanna Zwart

Commissioner Shokooh Miry

Commissioner Carrie Schwab-Pomerantz

Commissioner Andrea Shorter

Commissioner Julie D. Soo

Emily M. Murase, PhD, Director  
Department on the Status of Women

This report is available at the San Francisco Department on the Status of Women website, <https://sfgov.org/dosw/gender-analysis-reports>.

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## Executive Summary

In 2008, San Francisco voters overwhelmingly approved a City Charter Amendment (section 4.101) establishing as City policy for the membership of Commissions and Boards to reflect the diversity of San Francisco’s population, and that appointing officials be urged to support the nomination, appointment, and confirmation of these candidates. Additionally, it requires the San Francisco Department on the Status of Women to conduct and publish a gender analysis of Commissions and Boards every two years.

The *2019 Gender Analysis of Commissions and Boards* includes more policy bodies such as task forces, committees, and advisory bodies, than previous analyses, which were limited to Commissions and Boards. Data was collected from 84 policy bodies and from a total of 741 members mostly appointed by the Mayor and Board of Supervisors. These policy bodies fall under two categories designated by the San Francisco Office of the City Attorney.<sup>1</sup> The first category, referred to as “Commissions and Boards,” are policy bodies with decision-making authority and whose members are required to submit financial disclosures to the Ethics Commission. The second category, referred to as “Advisory Bodies,” are policy bodies with advisory function whose members do *not* submit financial disclosures to the Ethics Commission. This report examines policy bodies and appointees both comprehensively as a whole and separately by the two categories.

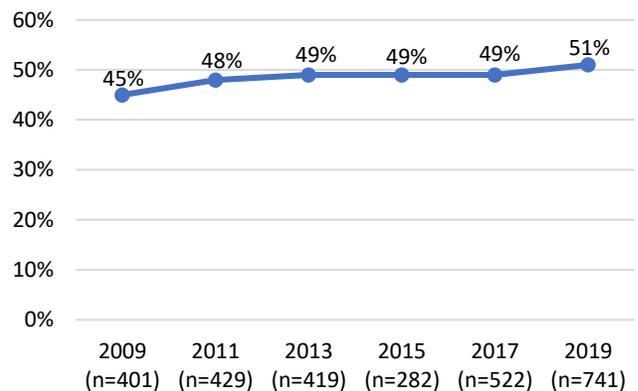
The *2019 Gender Analysis* evaluates the representation of women; people of color; lesbian, gay, bisexual, transgender, queer, and questioning (LGBTQ) individuals; people with disabilities; and veterans on San Francisco policy bodies.

### Key Findings

#### Gender

- Women’s representation on policy bodies is 51%, slightly above parity with the San Francisco female population of 49%.
- Since 2009, there has been a small but steady increase in the representation of women on San Francisco policy bodies.

**10-Year Comparison of Representation of Women on Policy Bodies**



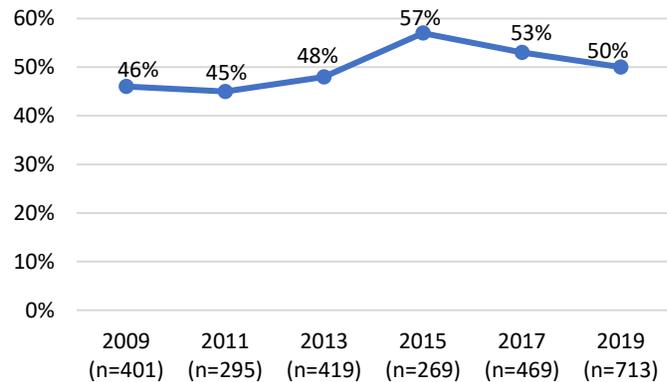
Source: SF DOSW Data Collection & Analysis.

<sup>1</sup> “List of City Boards, Commissions, and Advisory Bodies Created by Charter, Ordinance, or Statute,” Office of the City Attorney, <https://www.sfcityattorney.org/wp-content/uploads/2016/01/Commission-List-08252017.pdf>, (August 25, 2017).

## Race and Ethnicity

- People of color are underrepresented on policy bodies compared to the population. Although people of color comprise 62% of San Francisco’s population, just 50% of appointees identify as a race other than white.
- While the overall representation of people of color has increased between 2009 and 2019, as the Department collected data on more appointees, the representation of people of color has decreased over the last few years. The percentage of appointees of color decreased from 53% in 2017 to 49% in 2019.
- As found in previous reports, Latinx and Asian groups are underrepresented on San Francisco policy bodies compared to the population. Latinx individuals are 14% of the population but make up only 8% of appointees. Asian individuals are 31% of the population but make up only 18% of appointees.

**10-Year Comparison of Representation of People of Color on Policy Bodies**

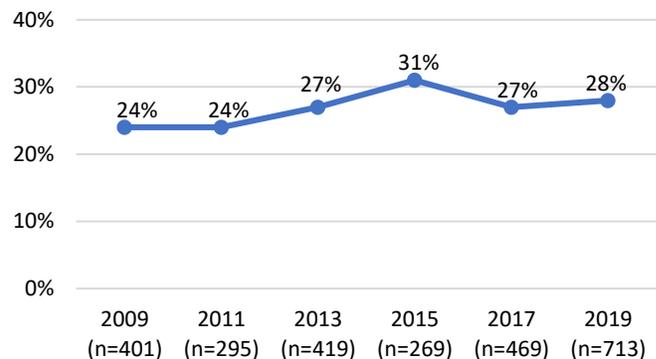


Source: SF DOSW Data Collection & Analysis.

## Race and Ethnicity by Gender

- On the whole, women of color are 32% of the San Francisco population, and 28% of appointees. Although still below parity, 28% is a slight increase compared to 2017, which showed 27% women of color appointees.
- Meanwhile, men of color are underrepresented at 21% of appointees compared to 31% of the San Francisco population.
- Both White women and men are overrepresented on San Francisco policy bodies. White women are 23% of appointees compared to 17% of the San Francisco population. White men are 26% of appointees compared to 20% of the population.
- Black and African American women and men are well-represented on San Francisco policy bodies. Black women are 9% of appointees compared to 2.4% of the population, and Black men are 5% of appointees compared to 2.5% of the population.
- Latinx women are 7% of the San Francisco population but 3% of appointees, and Latinx men are 7% of the population but 5% of appointees.
- Asian women are 17% of the San Francisco population but 11% of appointees, and Asian men are 15% of the population but just 7% of appointees.

**10-Year Comparison of Representation of Women of Color on Policy Bodies**



Source: SF DOSW Data Collection & Analysis.

### **Additional Demographics**

- Out of the 74% of appointees who responded to the survey question on LGBTQ identity, 19% identify as lesbian, gay, bisexual, transgender, nonbinary, queer, or questioning, and 81% of appointees identify as straight/heterosexual.
- Out of the 70% of appointees who responded to the question on disability, 11% identify as having one or more disabilities, which is just below the 12% of the adult population with a disability in San Francisco.
- Out of the 67% of appointees who responded to the question on veteran status, 7% have served in the military compared to 3% of the San Francisco population.

### **Proxies for Influence: Budget & Authority**

- Although women are half of all appointees, those Commissions and Boards with the largest budgets have fewer women and especially fewer women of color. Meanwhile, women exceed representation on Boards and Commissions with the smallest budgets and women of color reach parity with the population on the smallest budgeted Commissions and Boards.
- Although still underrepresented relative to the San Francisco population, there is a larger percentage of people of color on Commissions and Boards with both the largest and smallest budgets compared to overall appointees.
- The percentage of total women is greater on Advisory Bodies than Commissions and Boards. Women are 54% of appointees on Advisory Bodies and 48% of appointees on Commissions and Boards. However, the percentages of people of color and women of color on Commissions and Boards exceed the percentages of people of color and women of color on Advisory Bodies.

### **Appointing Authorities**

- Mayoral appointments include 55% women, 52% people of color, and 30% women of color, which is more diverse by gender and race compared to both Supervisorial appointments and total appointments.

### **Demographics of Appointees Compared to the San Francisco Population**

	Women	People of Color	Women of Color	LGBTQ	Disability Status	Veteran Status
San Francisco Population	49%	62%	32%	6%-15%*	12%	3%
Total Appointees	51%	50%	28%	19%	11%	7%
10 Largest Budgeted Commissions & Boards	41%	55%	23%			
10 Smallest Budgeted Commissions & Boards	52%	54%	32%			
Commissions and Boards	48%	52%	30%			
Advisory Bodies	54%	49%	28%			

Sources: 2017 American Community Survey 5-Year Estimates, SF DOSW Data Collection & Analysis, 2019, \*Note: Estimates vary by source. See page 16 for a detailed breakdown.

## I. Introduction

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Inspired by the 4th UN World Conference on Women in Beijing, San Francisco became the first city in the world to adopt a local ordinance reflecting the principles of the U.N. Convention on the Elimination of All Forms of Discrimination (CEDAW), an international bill of rights for women. The CEDAW Ordinance was passed unanimously by the San Francisco Board of Supervisors and signed into law by Mayor Willie L. Brown, Jr. on April 13, 1998.<sup>2</sup> In 2002, the CEDAW Ordinance was revised to address the intersection of race and gender and incorporate reference to the UN Convention on the Elimination of all Forms of Race Discrimination. The Ordinance requires City Government to take proactive steps to ensure gender equity and specifies “gender analysis” as a preventive tool to identify and address discrimination. Since 1998, the Department on the Status of Women has employed this tool to analyze the operations of 10 City Departments using a gender lens.

In 2007, the Department on the Status of Women conducted the first gender analysis to evaluate the number of women appointed to City Commissions and Boards. The findings of this analysis informed a City Charter Amendment developed by the Board of Supervisors for the June 2008 Election. This City Charter Amendment (Section 4.101) was overwhelmingly approved by voters and made it city policy that:

- The membership of Commissions and Boards are to reflect the diversity of San Francisco’s population,
- Appointing officials are to be urged to support the nomination, appointment, and confirmation of these candidates, and
- The Department on the Status of Women is required to conduct and publish a gender analysis of Commissions and Boards every 2 years.

The *2019 Gender Analysis* examines the representation of women; people of color; lesbian, gay, bisexual, transgender, queer, and questioning (LGBTQ) individuals; people with disabilities; and veterans on San Francisco policy bodies primarily appointed by the Mayor and the Board of Supervisors. This year’s analysis included more outreach to policy bodies as compared to previous analyses that were limited to Commissions and Boards. As a result, more appointees were included in the data collection and analysis than even before. These policy bodies fall under two categories designated by the San Francisco Office of the City Attorney. The first category, referred to as “Commissions and Boards,” are policy bodies with decision-making authority and whose members are required to submit financial disclosures to the Ethics Commission, and the second category, referred to as “Advisory Bodies,” are policy bodies with advisory function whose members do not submit financial disclosures to the Ethics Commission. A detailed description of methodology and limitations can be found at the end of this report on page 23.

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<sup>2</sup> San Francisco Administrative Code Chapter 33.A.  
[http://library.amlegal.com/nxt/gateway.dll/California/administrative/chapter33alocalimplementationoftheunited?f=templates\\$fn=default.htm\\$3.0\\$vid=amlegal:sanfrancisco\\_ca\\$anc=JD\\_Chapter33A](http://library.amlegal.com/nxt/gateway.dll/California/administrative/chapter33alocalimplementationoftheunited?f=templates$fn=default.htm$3.0$vid=amlegal:sanfrancisco_ca$anc=JD_Chapter33A).

## II. Gender Analysis Findings

Many aspects of San Francisco’s diversity are reflected in the overall population of appointees on San Francisco policy bodies. The analysis includes 84 policy bodies, of which 823 of the 887 seats are filled leaving 7% vacant. As outlined below in the summary chart, slightly more than half of appointees are women, half of appointees are people of color, 28% are women of color, 19% are LGBTQ, 11% have a disability, and 7% are veterans.

**Figure 1: Summary Data of Policy Body Demographics, 2019**

Appointee Demographics	Percentage of Appointees
Women (n=741)	51%
People of Color (n=706)	50%
Women of Color (n=706)	28%
LGBTQ Identified (n=548)	19%
People with Disabilities (n=516)	11%
Veteran Status (n=494)	7%

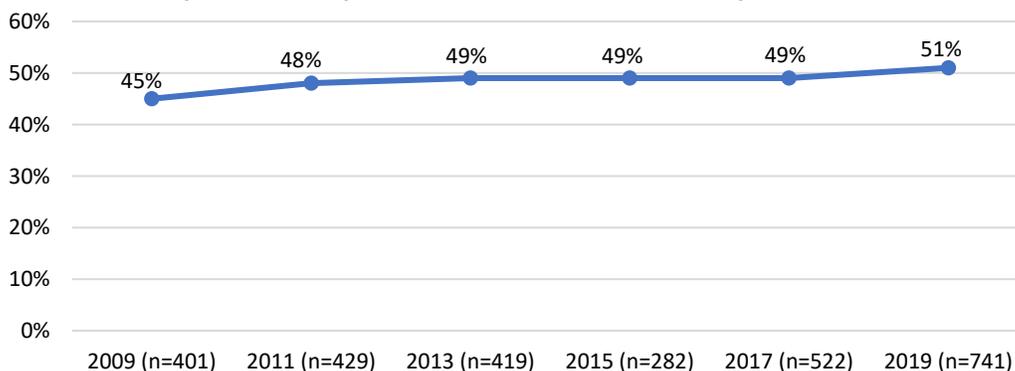
Source: SF DOSW Data Collection & Analysis.

However, further analysis reveals underrepresentation of particular groups. Subsequent sections present comprehensive data analysis providing comparison to previous years, detailing the variables of gender, race/ethnicity, LGBTQ identity, disability, veteran status, and policy body characteristics of budget size, decision-making authority, and appointment authority.

### A. Gender

On San Francisco policy bodies, 51% of appointees identify as women, which is slightly above parity compared to the San Francisco female population of 49%. The representation of women remained stable at 49% from 2013 until 2017. This year, the representation of women increased by 2 percentage points, which could be partly due to the larger sample size used in this year’s analysis compared to previous years. A 10-year comparison shows that the representation of women appointees has gradually increased since 2009 by a total of six percentage points.

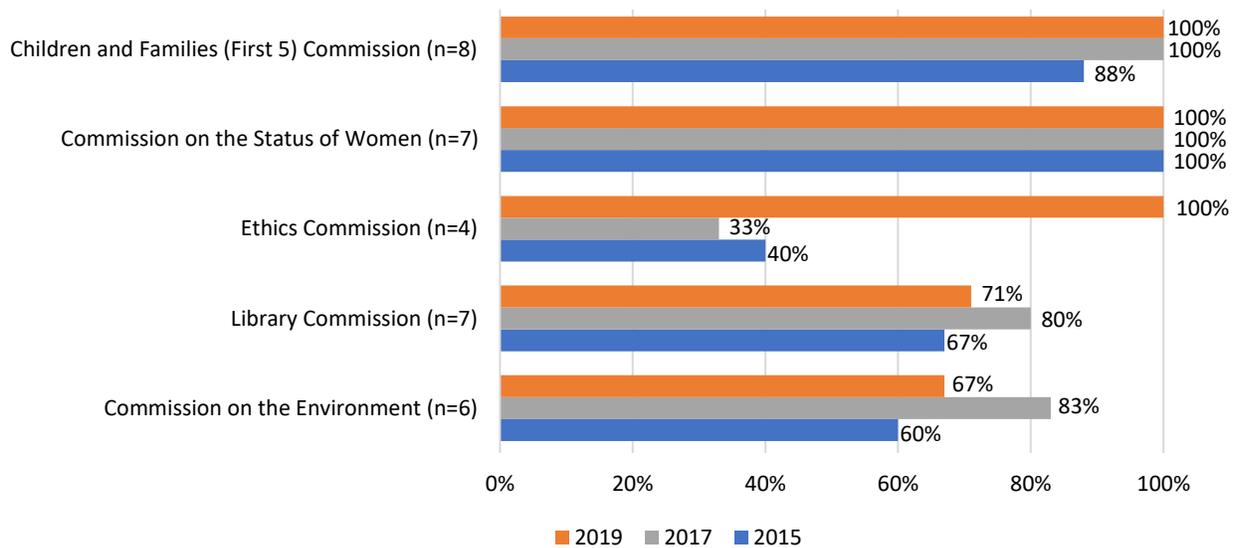
**Figure 2: 10-Year Comparison of Representation of Women on Policy Bodies**



Source: SF DOSW Data Collection & Analysis.

Figures 3 and 4 analyze Commissions and Boards. Figure 3 showcases the five Commissions and Boards with the highest representation of women appointees as compared to 2015 and 2013. The Children and Families (First Five) Commission and the Commission on the Status of Women are currently comprised of all women appointees. This finding has been consistent for the Commission on the Status of Women in 2015 and 2017. While the Ethics Commission has 100% women appointees, much more than 2015 and 2017, its small size of five appointees means that minimal changes in its demographic composition greatly impacts percentages. This is also the case for other policy bodies with a small number of members. The Library Commission and the Commission on the Environment are fourth and fifth on the list at 71% and 67% women, respectively, with long standing female majorities on each.

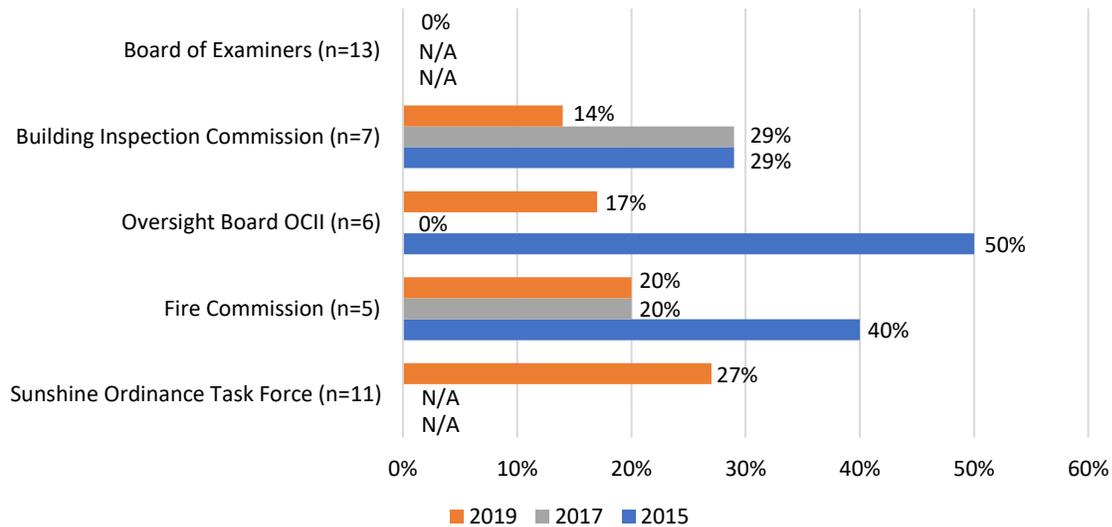
**Figure 3: Commissions and Boards with Highest Percentages of Women, 2019 Compared to 2017, 2015**



Source: SF DOSW Data Collection & Analysis.

Out of the Commissions and Boards in this section, 23 have 40% or less women. The five Commissions and Boards with the lowest representation of women are displayed in Figure 4. The lowest percentage is found on the Board of Examiners where currently *none* of the 13 appointees are women. Unfortunately, demographic data is unavailable for the Board of Examiners for 2017 and 2015. Next is the Building Inspection Commission at 14%, which is a decrease of female representation compared to 2017 and 2015. The Oversight Board of Community Investment and Infrastructure, Fire Commission, and Sunshine Ordinance Task Force also have some of the lowest percentages of women at 17%, 20%, and 27%, respectively. Unfortunately, the Sunshine Ordinance Task Force did not participate in previous analyses and therefore demographics data is unavailable for 2017 and 2015.

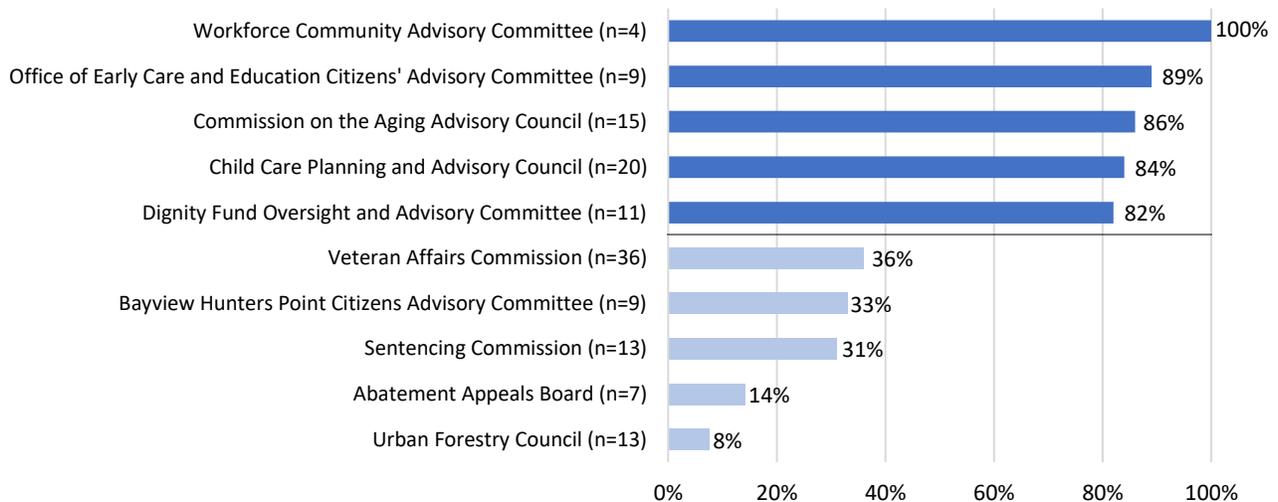
**Figure 4: Commissions and Boards with Lowest Percentage of Women, 2019 Compared to 2017, 2015**



Source: SF DOSW Data Collection & Analysis.

In addition to Commissions and Boards, Advisory Bodies were examined for the highest and lowest percentages of women. This is the first year such bodies have been included, thus comparison to previous years is unavailable. Figure 9 below displays the five Advisory Bodies with the highest and the five with the lowest representations of women. The Workforce Community Advisory Committees has the greatest representation of women at 100%, followed by the Office of Early Care and Education Citizen’s Advisory Committee at 89%. The Advisory Bodies with the lowest percentage of women are the Urban Forestry Council at 8% of the 13-member body and the Abatement Appeals Board at 14% of the 7-member body.

**Figure 5: Advisory Bodies with the Highest and Lowest Percentage of Women, 2019**

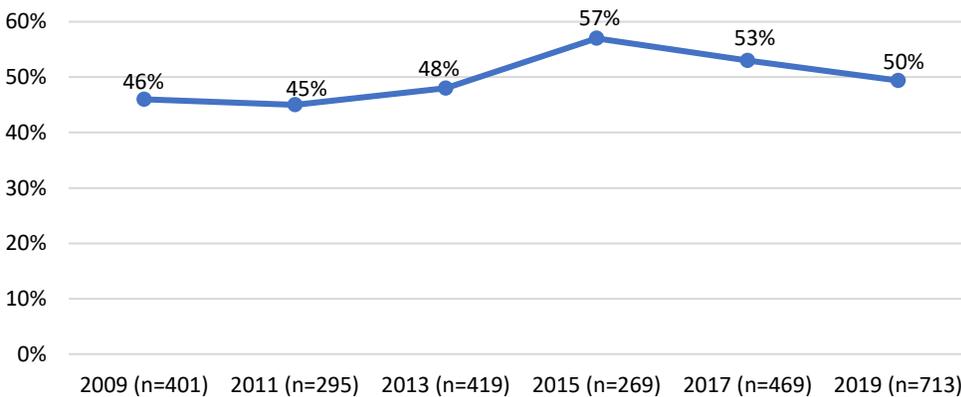


Source: SF DOSW Data Collection & Analysis.

## B. Race and Ethnicity

Data on racial and ethnic identity was collected for 706, or 95%, of the 741 surveyed appointees. Although half of appointees identify as a race or ethnicity other than white or Caucasian, people of color are still underrepresented compared to the San Francisco population of 62%. The representation of people of color has increased since 2009 but has decreased following 2015. The number of appointees analyzed increased substantially in 2017 and 2019 compared to 2015, and these larger data samples have coincided with smaller percentages of people of color. The percentage decrease following 2017 could be partially due to the inclusion of more policy and advisory bodies, as the representation of people of color on Commissions and Boards dropped only slightly from 53% in 2017 to 52% in 2019.

**Figure 6: 10-Year Comparison of Representation of People of Color on Policy Bodies**



Source: SF DOSW Data Collection & Analysis.

The racial and ethnic breakdown of policy body members compared to the San Francisco population is shown in Figure 7. This analysis reveals underrepresentation and overrepresentation in San Francisco policy bodies for certain racial and ethnic groups. Half of all appointees are white, an overrepresentation by more than 10 percentage points. The Black and African American community is well represented on appointed policy bodies at 14% compared to 5% of the population of San Francisco. Characterizing this as an overrepresentation is inaccurate given the representation of Black or African American people on policy bodies has been consistent over the years while the San Francisco population has declined over the same period.<sup>3</sup> Furthermore, the most recent nationwide estimate for the Black or African American population is 13%, which is nearly equal to the 14% of Black or African American appointees present on San Francisco policy bodies.<sup>4</sup>

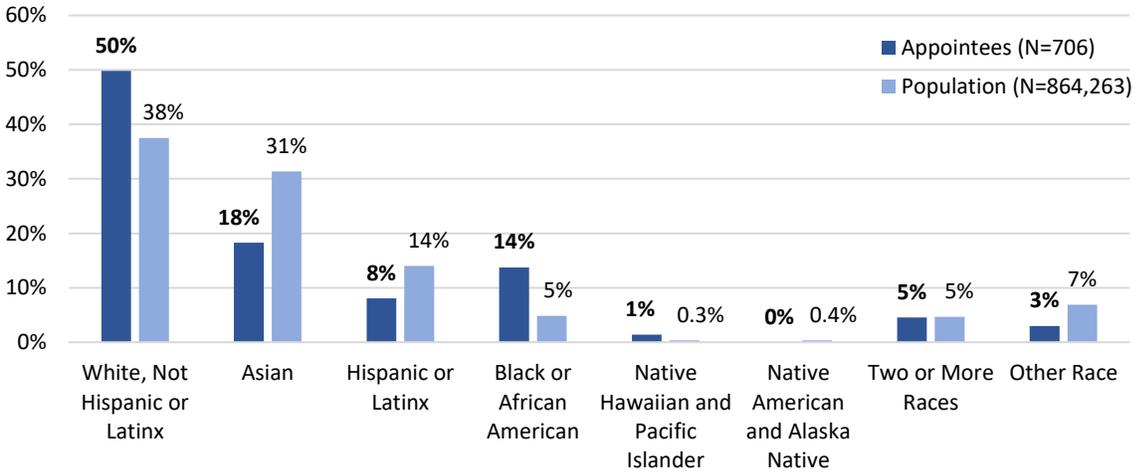
Considerably underrepresented racial and ethnic groups on San Francisco policy bodies compared to the San Francisco population are individuals who identify as Asian or Latinx. While Asians are 31% of the San Francisco population, they only make up 18% of appointees. While the Latinx population of San Francisco is 14%, only 8% of appointees are Latinx. Although there is a small population of Native

<sup>3</sup> Samir Gambhir and Stephen Menendian, "Racial Segregation in the Bay Area, Part 2," *Haas Institute for a Fair and Inclusive Society* (2018).

<sup>4</sup> US Census Bureau, 2018, Retrieved from <https://www.census.gov/quickfacts/fact/table/US/PST045218>.

Americans and Alaska Natives in San Francisco of 0.4%, none of the surveyed appointees identified themselves as such.

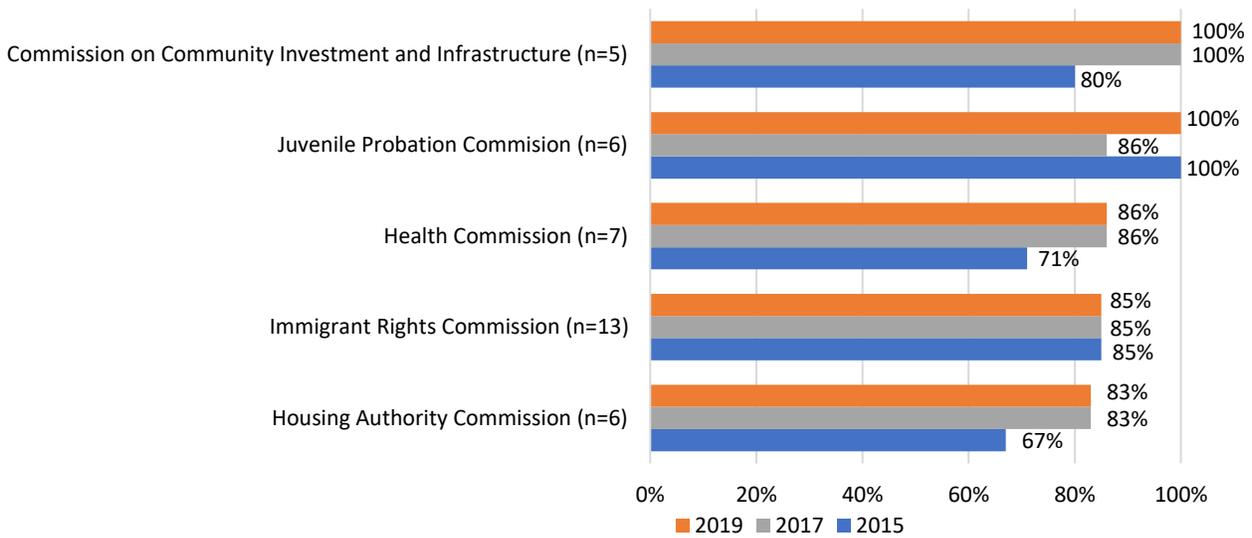
**Figure 7: Race and Ethnicity of Appointees Compared to San Francisco Population, 2019**



Sources: 2017 American Community Survey 5-Year Estimates, SF DOSW Data Collection & Analysis.

The next two graphs illustrate Commissions and Boards, and Advisory Bodies with the highest and lowest percentages of people of color. As shown in Figure 8, the Commission on Community Investment and Infrastructure remained at 100% from 2017, while the Juvenile Probation Commission has returned to 100% this year after a dip in 2017. Next is the Health Commission, Immigrant Rights Commission, and Housing Authority Commission at 86%, 85%, and 83%, respectively. Percentages of people of color on both the Health Commission and the Housing Authority Commission increased following 2015, and have remained consistent since 2017.

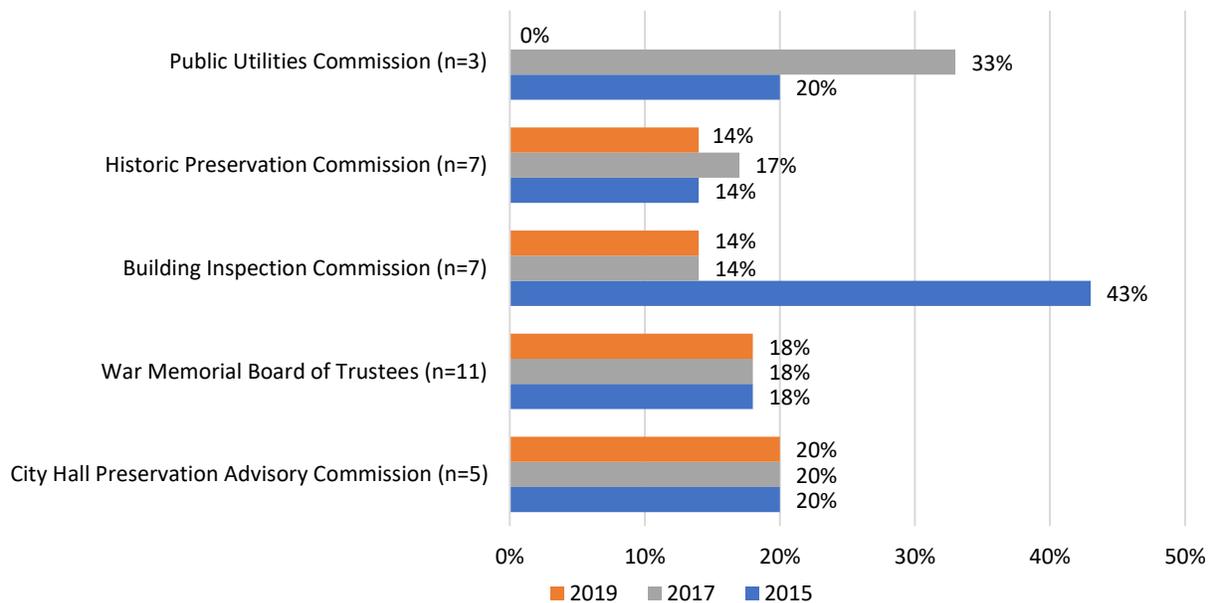
**Figure 8: Commissions and Boards with Highest Percentage of People of Color, 2019 Compared to 2017, 2015**



Source: SF DOSW Data Collection & Analysis.

There are 23 policy bodies that have 40% or less appointees who identified a racial and ethnic category other than white. Although the Public Utilities Commission has two vacancies, *none* of the current appointees identify as people of color. The Historic Preservation Commission and Building Inspection Commission are both at 14% representation for people of color. The Building Inspection Commission had a large drop from 43% in 2015, with the percentage of people of color decreasing to 14% in 2017 and remaining at this percent for 2019. Lastly, the War Memorial Board of Trustees and City Hall Preservation Advisory Commission have 18% and 20%, respectively.

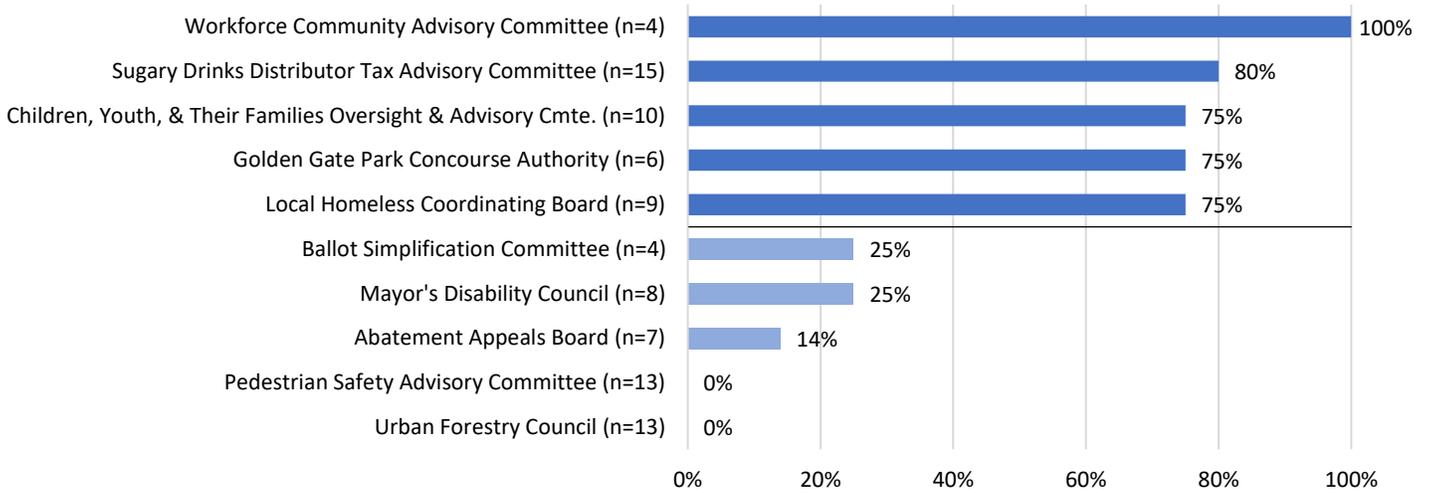
**Figure 9: Commissions and Boards with Lowest Percentage of People of Color, 2019 Compared to 2017, 2015**



Source: SF DOSW Data Collection & Analysis.

In addition to Commissions and Boards, Advisory Bodies were examined for the highest and lowest percentages of people of color. This is the first year such bodies have been included, thus comparison to previous years is unavailable. All members of the Workforce Community Advisory Committee are people of color. People of color comprise 80% of the Sugary Drinks Distributor Tax Advisory Committee, and 75% of appointees on the Children, Youth and Their Families Oversight and Advisory Committee, the Golden Gate Park Concourse Authority, and the Local Homeless Coordinating Board. Out of the five Advisory Bodies with the lowest representation of people of color, the Ballot Simplification Committee and the Mayor’s Disability Council have 25% appointees of color, and the Abatement Appeals Board has 14% appointees of color. The Urban Forestry and the Pedestrian Safety Advisory Committee have no people of color currently serving.

**Figure 10: Advisory Bodies with the Highest and Lowest Percentage of People of Color, 2019**

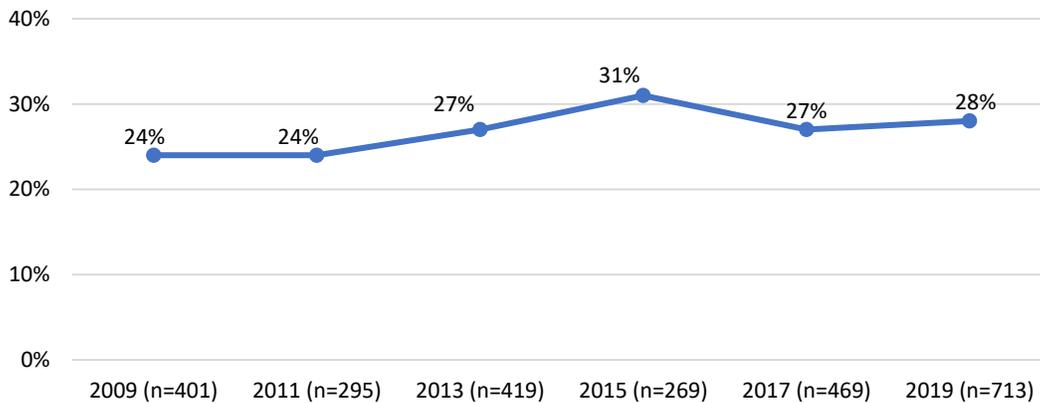


Source: SF DOSW Data Collection & Analysis.

### C. Race and Ethnicity by Gender

White men and women are overrepresented on San Francisco policy bodies, while Asian and Latinx men and women are underrepresented. While women of color continue to be underrepresented at 28% compared to the San Francisco population of 32%, this is a slight increase from 2017 which showed 27% women of color. Meanwhile, men of color are 21% of appointees compared to 31% of the San Francisco population.

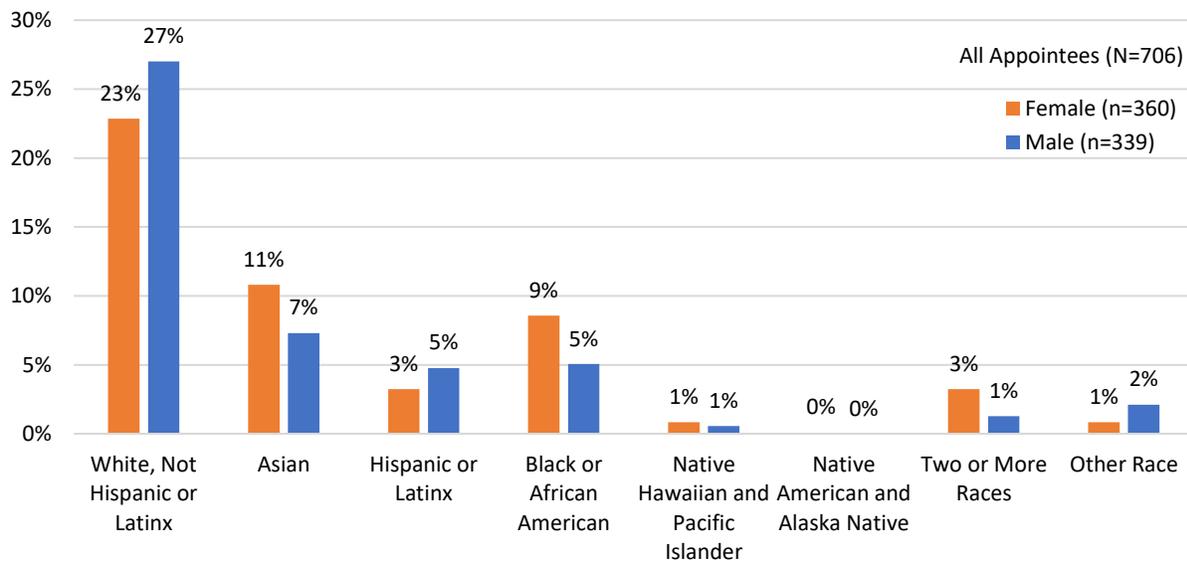
**Figure 11: 10-Year Comparison of Representation of Women of Color on Policy Bodies**



Source: SF DOSW Data Collection & Analysis.

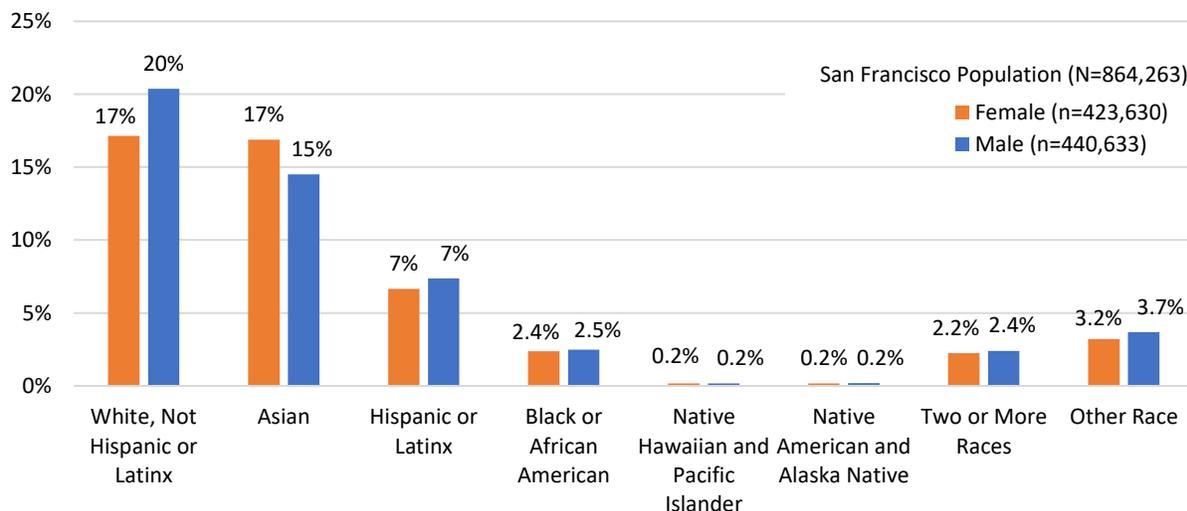
The following figures present the breakdown for appointees and the San Francisco population by race and ethnicity and gender. White men and women are overrepresented, holding 27% and 23% of appointments, respectively, compared to 20% and 17% of the population, respectively. Asian men and women are both greatly underrepresented with Asian women making up 11% of appointees compared to 17% of the population while Asian men comprise 7% of appointees and 15% of the population. Latinx men and women are also underrepresented, particularly Latinx women, who are 3% of appointees and 7% of the population, while Latinx men are 5% of appointees and 7% of the population. Black or African American men and women are well-represented with Black women comprising 9% of appointees and Black men comprising 5% of appointees. Pacific Islander men and women, and multiethnic women also exceed parity with the population. Although Native American men and women make up only 0.4% of San Francisco’s population, none of the surveyed appointees identified themselves as such.

**Figure 12: Appointees by Race/Ethnicity and Gender, 2019**



Source: SF DOSW Data Collection & Analysis.

**Figure 13: San Francisco Population by Race/Ethnicity, 2019**



Source: 2017 American Community Survey 5-Year Estimates.

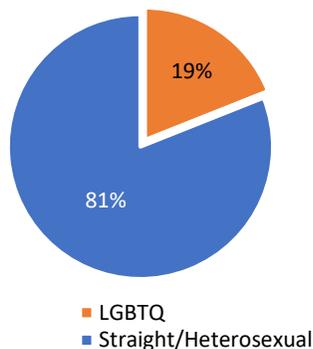
## D. LGBTQ Identity

Lesbian, gay, bisexual, transgender, queer, and questioning (LGBTQ) identity data was collected from 548, or 75%, of the 741 surveyed appointees, which is much more data on LGBTQ identity compared to previous reports. Due to limited and outdated information on the population of the LGBTQ community in San Francisco, it is difficult to adequately assess the representation of the LGBTQ community. However, compared to available San Francisco, larger Bay Area, and national data, the LGBTQ community is well represented on San Francisco policy bodies. Recent research estimates the national LGBT population is 4.5%.<sup>5</sup> The LGBT population of the San Francisco and greater Bay Area is estimated to rank the highest of U.S. cities at 6.2%,<sup>6</sup> while a 2006 survey found that 15.4% of adults in San Francisco identify as LGBT<sup>7</sup>.

Of the appointees who responded to this question, 19% identify as LGBTQ and 81% identify as straight or heterosexual. Of the LGBTQ appointees, 48% identify as gay, 23% as lesbian, 17% as bisexual, 7% as queer, 5% as transgender, and 1% as questioning. Data on LGBTQ identity by race was not captured. Efforts to capture data on LGBTQ identity by race for future reports would enable more intersectional analysis.

**Figure 14: LGBTQ Identity of Appointees, 2019**

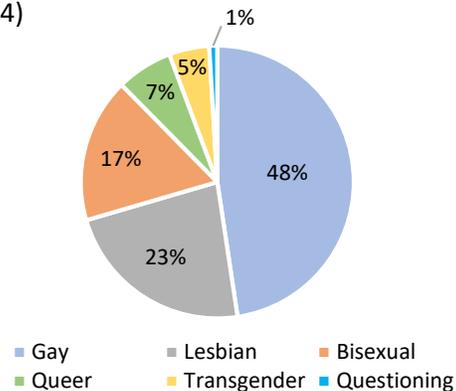
(N=548)



Source: SF DOSW Data Collection & Analysis.

**Figure 15: LGBTQ Population of Appointees, 2019**

(N=104)



Source: SF DOSW Data Collection & Analysis.

## E. Disability Status

Overall, 12% of adults in San Francisco have one or more disabilities, and when broken down by gender, 6.2% are women and 5.7% are men. Disability data for transgender and gender non-conforming individuals in San Francisco is currently unavailable. Data on disability was obtained from 516, or 70%, of the 741 appointees who participated in the survey. Of the 516 appointees, 11.2% reported to have one

<sup>5</sup> Frank Newport, "In U.S., Estimate of LGBT Population Rises to 4.5%," *GALLUP* (May 22, 2018) <https://news.gallup.com/poll/234863/estimate-lgbt-population-rises.aspx>.

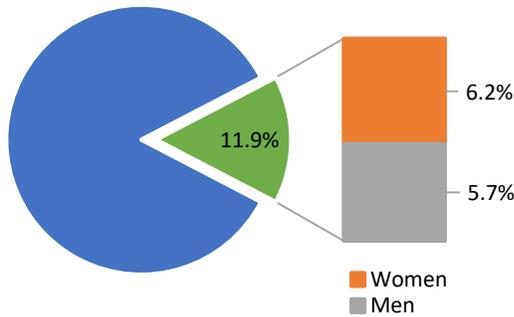
<sup>6</sup> Gary J. Gates and Frank Newport, "San Francisco Metro Area Ranks Highest in LGBT Percentage," *GALLUP* (March 20, 2015) [https://news.gallup.com/poll/182051/san-francisco-metro-area-ranks-highest-lgbt-percentage.aspx?utm\\_source=Social%20Issues&utm\\_medium=newsfeed&utm\\_campaign=tiles](https://news.gallup.com/poll/182051/san-francisco-metro-area-ranks-highest-lgbt-percentage.aspx?utm_source=Social%20Issues&utm_medium=newsfeed&utm_campaign=tiles).

<sup>7</sup> Gary J. Gates, "Same Sex Couples and the Gay, Lesbian, Bisexual Population: New Estimates from the American Community Survey," *The Williams Institute on Sexual Orientation Law and Public Policy, UCLA School of Law* (2006).

or more disabilities, which is near parity with the San Francisco population. Of the 11.2% appointees with one or more disabilities, 6.8% are women, 3.9% are men, 0.4% are trans women, and 0.2% are trans men.

**Figure 16: San Francisco Adult Population with a Disability by Gender, 2017**

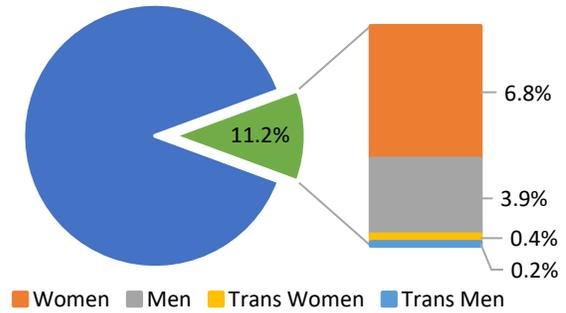
(N=744,243)



Source: 2017 American Community Survey 5-Year Estimates.

**Figure 17: Appointees with One or More Disabilities by Gender, 2019**

(N=516)



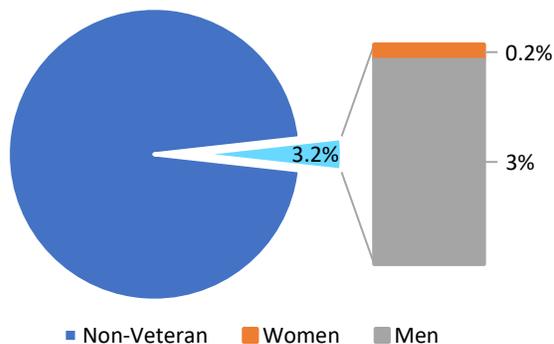
Source: SF DOSW Data Collection & Analysis.

## F. Veteran Status

Overall, 3.2% of the adult population in San Francisco has served in the military. There is a considerable difference by gender, as male veterans are 3% and female veterans are 0.2% of the population. Data on veteran status was obtained from 494, or 67%, of appointees who participated in the survey. Of the 494 appointees who responded to this question, 7.1% have served in the military. Like the San Francisco population, there is a large difference by gender, as men comprise 5.7% and women make up only 1.2% of the total number of veteran appointees. Of participating appointees, 0.2% of veterans are trans women. Veteran status data on transgender and gender non-conforming individuals in San Francisco is currently unavailable.

**Figure 18: San Francisco Adult Population with Military Service by Gender, 2017**

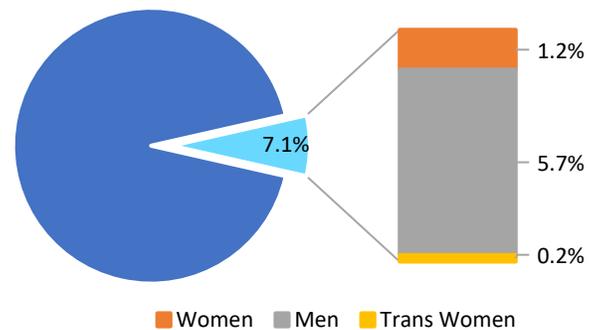
(N=747,896)



Source: 2017 American Community Survey 5-Year Estimates.

**Figure 19: Appointees with Military Service, 2019**

(N=494)



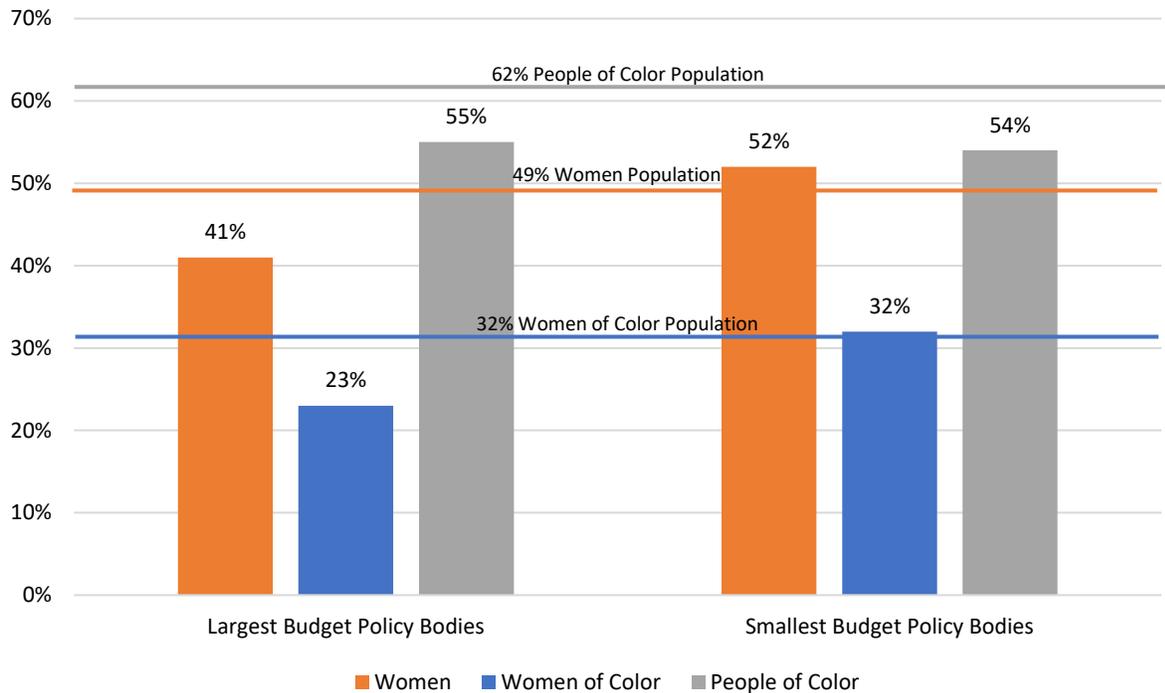
Source: SF DOSW Data Collection & Analysis.

## G. Policy Bodies by Budget

This report also examines whether policy bodies with the largest and smallest budget sizes and other characteristics are demographically representative of the San Francisco population. In this section, budget size is used as a proxy for influence. Although this report has expanded the scope of analysis to include more policy bodies compared to previous reports, this section of analysis was limited to Commissions and Boards with decision-making authority and whose members file financial disclosures with the Ethics Commission. The purpose of this analysis is to evaluate the demographics for the spectrum of budgetary influence of policy bodies with decision-making authority in San Francisco.

Overall, appointees from the 10 largest budgeted Commissions and Boards are 55% people of color, 41% women, and 23% women of color. Appointees from the 10 smallest budgeted Commissions and Boards are 54% people of color, 52% women, and 32% women of color. Although still below parity with the San Francisco population, the representation of people of color on both the largest and smallest budgeted policy bodies is greater than the percentage of people of color for all appointees combined (50%). For women and women of color, their representation meets or exceeds parity with the population on the 10 smallest budgeted bodies. However, it falls far below parity for the 10 largest budgeted bodies. The representation of total women and women of color is greater on smaller budgeted policy bodies by 27%, and 39%, respectively.

**Figure 20: Percent of Women, Women of Color, and People of Color on Commissions and Boards with Largest and Smallest Budgets in Fiscal Year 2018-2019**



Source: SF DOSW Data Collection & Analysis.

**Figure 21: Demographics of Commissions and Boards with Largest Budgets, 2019**

Body	FY18-19 Budget	Total Seats	Filled seats	Women	Women of Color	People of Color
Health Commission	\$2,200,000,000	7	7	29%	14%	86%
Public Utilities Commission	\$1,296,600,000	5	3	67%	0%	0%
MTA Board of Directors and Parking Authority Commission	\$1,200,000,000	7	7	57%	14%	43%
Airport Commission	\$1,000,000,000	5	5	40%	20%	40%
Commission on Community Investment and Infrastructure	\$745,000,000	5	5	60%	60%	100%
Police Commission	\$687,139,793	7	7	43%	43%	71%
Health Authority (Plan Governing Board)	\$666,000,000	19	15	33%	27%	47%
Human Services Commission	\$529,900,000	5	5	40%	0%	40%
Fire Commission	\$400,721,970	5	5	20%	20%	40%
Aging and Adult Services Commission	\$334,700,000	7	7	43%	14%	57%
<b>Total</b>	<b>\$9,060,061,763</b>	<b>72</b>	<b>66</b>	<b>41%</b>	<b>23%</b>	<b>55%</b>

Source: SF DOSW Data Collection & Analysis.

**Figure 22: Demographics of Commissions and Boards with Smallest Budgets, 2019**

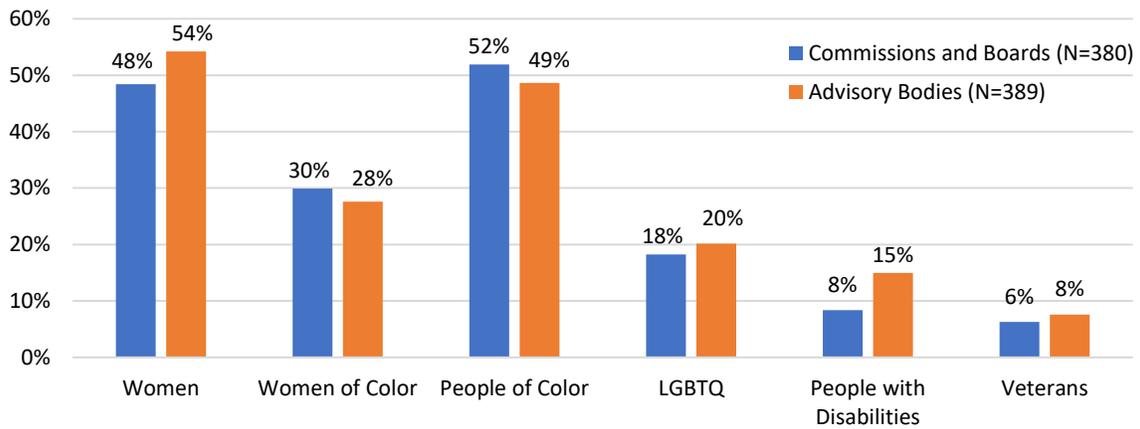
Body	FY18-19 Budget	Total Seats	Filled Seats	Women	Women of color	People of Color
Rent Board Commission	\$8,543,912	10	9	44%	11%	33%
Commission on the Status of Women	\$8,048,712	7	7	100%	71%	71%
Ethics Commission	\$6,458,045	5	4	100%	50%	50%
Human Rights Commission	\$4,299,600	12	10	50%	50%	70%
Small Business Commission	\$2,242,007	7	7	43%	29%	43%
Civil Service Commission	\$1,262,072	5	4	50%	0%	25%
Board of Appeals	\$1,072,300	5	5	40%	20%	40%
Entertainment Commission	\$1,003,898	7	7	29%	14%	57%
Assessment Appeals Board No.1, 2, & 3	\$663,423	24	18	39%	22%	44%
Youth Commission	\$305,711	17	16	56%	44%	75%
<b>Total</b>	<b>\$33,899,680</b>	<b>99</b>	<b>87</b>	<b>52%</b>	<b>32%</b>	<b>54%</b>

Source: SF DOSW Data Collection & Analysis.

## H. Comparison of Advisory Body and Commission and Board Demographics

The comparison of the two policy body categories in this section provides another proxy for influence, as Commissions and Boards whose members file disclosures of economic interest have greater decision-making authority in San Francisco than Advisory Bodies whose members do not file economic interest disclosures. The percentages of total women, LGBTQ people, people with disabilities, and veterans are larger for total appointees on Advisory Bodies. However, the percentages of women of color and people of color on Commissions and Boards slightly exceeds the percentages of women of color and people of color on Advisory Bodies.

**Figure 23: Demographics of Appointees on Commission and Boards and Advisory Bodies, 2019**

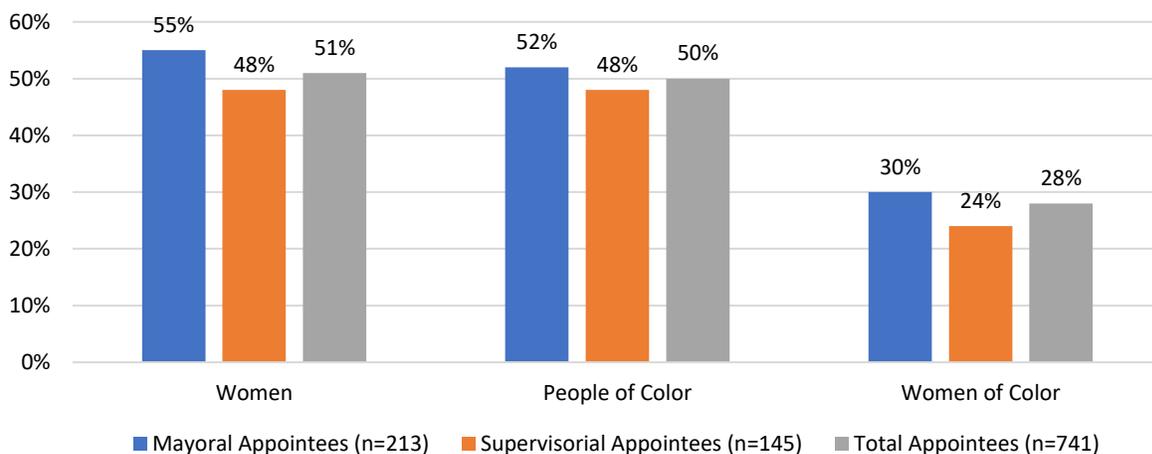


Source: SF DOSW Data Collection & Analysis.

### I. Demographics of Mayoral, Supervisorial, and Total Appointees

Figure 24 compares the representation of women, women of color, and people of color for appointments made by the Mayor, Board of Supervisors, and by the total of all approving authorities combined. Mayoral appointments are more diverse, and consist of more women, women of color, and people of color compared to Supervisorial appointments. Mayoral appointments include 55% women, 30% women of color, and 52% people of color, while Supervisorial appointments are 48% women, 24% women of color, and 48% people of color. The total of all approving authorities combined average out at 51% women, 28% women of color, and 50% people of color. This disparity in diversity between Mayoral and Supervisorial appointments may be due in part to the appointment section process for each authority. The 11-member Board of Supervisors only sees applicants for specific bodies through the 3-member Rules Committee or by designees, stipulated in legislation (e.g. “renter,” “landlord,” “consumer advocate”), whereas the Mayor typically has the ability to take total appointments into account during selections, and can therefore better address gaps in diversity.

**Figure 24: Demographics of Mayoral, Supervisorial, and Total Appointees, 2019**



Source: SF DOSW Data Collection & Analysis.

### III. Conclusion

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Since the first gender analysis of Commissions and Boards in 2007, the representation of women appointees on San Francisco policy bodies has gradually increased. The *2019 Gender Analysis* finds the percentage of women appointees is 51%, which slightly exceeds the population of women in San Francisco.

When appointee demographics are analyzed by gender and race, women of color continue to be underrepresented on San Francisco policy bodies compared to the San Francisco population. Most notably underrepresented are Asian women who make up 17% of the population but only 11% of appointees, and Latinx women who make up 7% of the population but only 3% of appointees. Additionally, men of color are underrepresented relative to their San Francisco population, primarily Asian and Latinx men.

Furthermore, when analyzing the demographic composition of larger and smaller budgeted Commissions and Boards, women are underrepresented on those with the largest budgets, and overrepresented or reach parity with the population on smaller budgeted Commissions and Boards. These two trends are amplified for women of color appointees. Women comprise 41% of total appointees on the largest budgeted policy bodies, which is 8 percentage points below the population, and women of color comprise 23% of total appointees on the largest budgeted policy bodies, 9 percentage points below their San Francisco population. Comparatively, women are 52% of total appointees on the smallest budgeted policy bodies, and women of color are 32% of appointees, which is equal to the San Francisco population. However, the issue of largest and smallest budgeted policy bodies does not seem to impact the representation of people of color. People of color make up 55% of appointees on the largest budgeted policy bodies and 54% of appointees on the smallest budgeted policy bodies compared to 50% of total appointees. Nonetheless, these percentages still fall below the San Francisco population of people of color at 62%.

In addition to using budget size as a proxy for influence, this report analyzed demographic characteristics of appointees on Commissions and Boards who file disclosures of economic interest and have decision-making authority, and appointees on Advisory Bodies who do not file economic interest disclosures. Over half (54%) of appointees on Advisory Bodies are women, while 48% of appointees on Commissions and Boards are women. Although 48% is only slightly below the San Francisco population of women, women comprise a decently higher percentage of appointees on Advisory Bodies compared to Commissions and Boards.

This year's report features more data on LGBTQ identity, veteran status, and disability than previous gender analyses. The *2019 Gender Analysis* found a relatively high representation of LGBTQ individuals on San Francisco policy bodies. For the appointees that provided LGBTQ identity information, 19% identify as LGBTQ with the largest subset being gay men at 48%. It is recommended for future gender analyses to collect LGBTQ data by race and gender to provide additional intersectional analysis. The representation of appointees with disabilities is 11%, just below the 12% population. Veterans are highly represented on San Francisco policy bodies at 7% compared to the veteran population of 3%.

Additionally, this report evaluates and compares the representation of women, women of color, and people of color appointees by the Mayor, Board of Supervisors, and by the total of all approving authorities combined. Mayoral appointees include 55% women, 30% women of color, and 52% people

of color, which overall is more diverse by gender and race compared to both Supervisorial appointees and total appointees.

This report is intended to advise the Mayor, Board of Supervisors, and other appointing authorities, as they select appointments for policy bodies of the City and County of San Francisco. In spirit of the 2008 City Charter Amendment that establishes this biennial Gender Analysis report requirement and the importance of diversity on San Francisco policy bodies, efforts to address gaps in diversity and inclusion should remain at the forefront when making appointments in order to accurately reflect the population of San Francisco.

## IV. Methodology and Limitations

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This report focuses on City and County of San Francisco Commissions, Boards, Task Forces, Councils, and Committees that have the majority of members appointed by the Mayor and Board of Supervisors and that have jurisdiction limited to the City. The gender analysis reflects data from the policy bodies that provided information to the Department on the Status of Women through digital and paper survey.

Data was requested from 90 policy bodies and acquired from 84 different policy bodies and a total of 741 appointees. A Commissioner or Board member's gender identity, race/ethnicity, sexual orientation, disability status, and veteran status were among data elements collected on a voluntary basis. Data on lesbian, gay, bisexual, transgender, queer, or questioning (LGBTQ) identity, disability, and veteran status of appointees were incomplete or unavailable for some appointees but are included to the extent possible. As the fundamental objective of this report is to surface patterns of underrepresentation, every attempt has been made to reflect accurate and complete information in this report. Data for some policy bodies was incomplete, and all appointees who responded were included in the total demographic categories. Only policy bodies with full data on gender and race for all appointees were included in sections comparing demographics of individual bodies. It should be noted that for policy bodies with a small number of members, the change of a single individual greatly impacts the percentages of demographic categories. As such, these percentages should be interpreted with this in mind.

The surveyed policy bodies fall under two categories designated by the San Francisco Office of the City Attorney document entitled *List of City Boards, Commissions, and Advisory Bodies Created by Charter, Ordinance, or Statute*.<sup>8</sup> This document separates San Francisco policy bodies into two different categories. The first category includes Commissions and Boards with decision-making authority and whose members are required to submit financial disclosures with the Ethics Commission, and the second category encompasses Advisory Bodies whose members do not submit financial disclosures with the Ethics Commission. Depending on the analysis criteria in each section of this report, the surveyed policy bodies and appointees are either examined comprehensively as a whole or examined separately in the two categories designated by the Office of the City Attorney.

Data from the U.S. Census 2013-2017 American Community Survey 5-Year Estimates provides a comparison to the San Francisco population. Figures 26 and 27 in the Appendix display these population estimates by race/ethnicity and gender.

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<sup>8</sup> "List of City Boards, Commissions, and Advisory Bodies Created by Charter, Ordinance, or Statute," Office of the City Attorney, <https://www.sfcityattorney.org/wp-content/uploads/2016/01/Commission-List-08252017.pdf>, (August 25, 2017).

## Appendix

**Figure 25: Policy Body Demographics, 2019<sup>9</sup>**

Policy Body	Total Seats	Filled Seats	FY18-19 Budget	Women	Women of Color	People of Color
Abatement Appeals Board	7	7	\$76,500,000	14%	0%	14%
Aging and Adult Services Commission	7	7	\$334,700,000	57%	33%	57%
Airport Commission	5	5	\$1,000,000,000	40%	50%	40%
Arts Commission	15	15	\$37,000,000	67%	50%	60%
Asian Art Commission	27	27	\$30,000,000	63%	71%	59%
Assessment Appeals Board No.1	8	5	\$663,423	20%	0%	20%
Assessment Appeals Board No.2	8	8	-	50%	75%	63%
Assessment Appeals Board No.3	8	4	-	50%	50%	50%
Ballot Simplification Committee	5	4	\$0	75%	33%	25%
Bayview Hunters Point Citizens Advisory Committee	12	9	\$0	33%	100%	67%
Board of Appeals	5	5	\$1,072,300	40%	50%	40%
Board of Examiners	13	13	\$0	0%	0%	46%
Building Inspection Commission	7	7	\$76,500,000	14%	0%	14%
Child Care Planning and Advisory Council	25	19	\$26,841	84%	50%	50%
Children and Families Commission (First 5)	9	8	\$28,002,978	100%	75%	75%
Children, Youth, and Their Families Oversight and Advisory Committee	11	10	\$155,224,346	50%	80%	75%
Citizen's Committee on Community Development	9	8	\$39,696,467	75%	67%	63%
City Hall Preservation Advisory Commission	5	5	\$0	60%	33%	20%
Civil Service Commission	5	4	\$1,262,072	50%	0%	25%
Commission on Community Investment and Infrastructure	5	5	\$745,000,000	60%	100%	100%
Commission on the Aging Advisory Council	22	15	\$0	80%	33%	31%
Commission on the Environment	7	6	\$27,280,925	67%	50%	50%
Commission on the Status of Women	7	7	\$8,048,712	100%	71%	71%
Dignity Fund Oversight and Advisory Committee	11	11	\$3,000,000	82%	33%	45%
Eastern Neighborhoods Citizens Advisory Committee	19	13	\$0	38%	40%	44%
Elections Commission	7	7	\$15,238,360	57%	25%	29%
Entertainment Commission	7	7	\$1,003,898	29%	50%	57%
Ethics Commission	5	4	\$6,458,045	100%	50%	50%
Film Commission	11	11	\$0	55%	67%	50%
Fire Commission	5	5	\$400,721,970	20%	100%	40%
Golden Gate Park Concourse Authority	7	6	\$0	50%	67%	75%

<sup>9</sup> Figure 25 only includes policy bodies with complete data on gender for all appointees. Some bodies had incomplete data on race/ethnicity of appointees. For these, percentages for people of color are calculated out of known race/ethnicity.

Policy Body	Total Seats	Filled Seats	FY18-19 Budget	Women	Women of Color	People of Color
Health Authority (Plan Governing Board)	19	15	\$666,000,000	33%	80%	50%
Health Commission	7	7	\$2,200,000,000	43%	50%	86%
Health Service Board	7	6	\$11,632,022	33%	0%	50%
Historic Preservation Commission	7	7	\$53,832,000	43%	33%	14%
Housing Authority Commission	7	6	\$60,894,150	50%	100%	83%
Human Rights Commission	12	10	\$4,299,600	60%	100%	70%
Human Services Commission	5	5	\$529,900,000	40%	0%	40%
Immigrant Rights Commission	15	13	\$0	54%	86%	85%
In-Home Supportive Services Public Authority	13	9	\$70,729,667	44%	50%	56%
Juvenile Probation Commission	7	6	\$48,824,199	33%	100%	100%
Library Commission	7	7	\$160,000,000	71%	40%	57%
Local Homeless Coordinating Board	9	9	\$40,000,000	56%	60%	75%
Mayor's Disability Council	11	8	\$0	75%	17%	25%
Mental Health Board	17	15	\$184,962	73%	64%	73%
MTA Board of Directors and Parking Authority Commission	7	7	\$1,200,000,000	57%	25%	43%
Office of Early Care and Education Citizens' Advisory Committee	9	9	\$0	89%	50%	56%
Oversight Board (COII)	7	6	\$745,000,000	17%	100%	67%
Pedestrian Safety Advisory Committee	17	13	\$0	46%	17%	8%
Planning Commission	7	6	\$53,832,000	50%	67%	33%
Police Commission	7	7	\$687,139,793	43%	100%	71%
Port Commission	5	5	\$192,600,000	60%	67%	60%
Public Utilities Citizen's Advisory Committee	17	13	\$0	54%	14%	31%
Public Utilities Commission	5	3	\$1,296,600,000	67%	0%	0%
Public Utilities Rate Fairness Board	7	6	\$0	33%	100%	67%
Public Utilities Revenue Bond Oversight Committee	7	5	\$0	40%	50%	40%
Recreation and Park Commission	7	7	\$230,900,000	29%	50%	43%
Reentry Council	24	23	\$0	43%	70%	70%
Rent Board Commission	10	9	\$8,543,912	44%	25%	33%
Residential Users Appeal Board	3	2	\$0	0%	0%	50%
Retirement System Board	7	7	\$95,000,000	43%	67%	29%
Sentencing Commission	13	13	\$0	31%	25%	67%
Small Business Commission	7	7	\$2,242,007	43%	67%	43%
SRO Task Force	12	12	\$0	42%	25%	55%
Sugary Drinks Distributor Tax Advisory Committee	16	15	\$0	67%	70%	80%
Sunshine Ordinance Task Force	11	11	\$0	27%	67%	36%
Sweatfree Procurement Advisory Group	11	7	\$0	43%	67%	43%
Treasure Island Development Authority	7	6	\$18,484,130	50%	N/A	N/A

Policy Body	Total Seats	Filled Seats	FY18-19 Budget	Women	Women of Color	People of Color
Treasure Island/Yerba Buena Island Citizens Advisory Board	17	13	\$0	54%	N/A	N/A
Urban Forestry Council	15	13	\$153,626	8%	0%	0%
Veterans Affairs Commission	17	11	\$0	36%	50%	55%
War Memorial Board of Trustees	11	11	\$18,185,686	55%	33%	18%
Workforce Community Advisory Committee	8	4	\$0	100%	100%	100%
Youth Commission	17	16	\$305,711	56%	78%	75%

Source: SF DOSW Data Collection & Analysis, 2019.

**Figure 26: San Francisco Population Estimates by Race/Ethnicity, 2017**

Race/Ethnicity	Total	
	Estimate	Percent
<b>San Francisco County California</b>	864,263	-
White, Not Hispanic or Latino	353,000	38%
Asian	295,347	31%
Hispanic or Latinx	131,949	14%
Some other Race	64,800	7%
Black or African American	45,654	5%
Two or More Races	43,664	5%
Native Hawaiian and Pacific Islander	3,226	0.3%
Native American and Alaska Native	3,306	0.4%

Source: 2017 American Community Survey 5-Year Estimates.

**Figure 27: San Francisco Population Estimates by Race/Ethnicity and Gender, 2017**

Race/Ethnicity	Total		Female		Male	
	Estimate	Percent	Estimate	Percent	Estimate	Percent
San Francisco County California	864,263	-	423,630	49%	440,633	51%
White, Not Hispanic or Latino	353,000	38%	161,381	17%	191,619	20%
Asian	295,347	31%	158,762	17%	136,585	15%
Hispanic or Latinx	131,949	14%	62,646	7%	69,303	7%
Some Other Race	64,800	7%	30,174	3%	34,626	4%
Black or African American	45,654	5%	22,311	2.4%	23,343	2.5%
Two or More Races	43,664	5%	21,110	2.2%	22,554	2.4%
Native Hawaiian and Pacific Islander	3,226	0.3%	1,576	0.2%	1,650	0.2%
Native American and Alaska Native	3,306	0.4%	1,589	0.2%	1,717	0.2%

Source: 2017 American Community Survey 5-Year Estimates.

City and County of San Francisco  
Department on the Status of Women  
25 Van Ness Avenue, Suite 240  
San Francisco, California 94102  
[sfgov.org/dosw](http://sfgov.org/dosw)  
[dosw@sfgov.org](mailto:dosw@sfgov.org)  
415.252.2570

**From:** [Tam, Madison \(BOS\)](#)  
**To:** [Young, Victor \(BOS\)](#)  
**Subject:** FW: Support for Jonathan Butler at 3/13 Rules Committee  
**Date:** Friday, March 10, 2023 9:51:45 AM  
**Attachments:** [image001.png](#)

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Please add this email as a support letter to Mr. Butler's file.

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**From:** Alden, Amiee <Amiee.Alden@ucsf.edu>  
**Sent:** Friday, March 10, 2023 9:22 AM  
**To:** Dorsey, Matt (BOS) <matt.dorsey@sfgov.org>  
**Cc:** Tam, Madison (BOS) <madison.r.tam@sfgov.org>; Butler, Jonathan (UCSF) <Jonathan.Butler@ucsf.edu>  
**Subject:** Support for Jonathan Butler at 3/13 Rules Committee

This message is from outside the City email system. Do not open links or attachments from untrusted sources.

Good Morning, Chair Dorsey,

UCSF is very pleased to support the nomination of a member of our faculty, Dr. Jonathan Butler, to the Homelessness Oversight Commission. This item will be considered by the Rules Committee on March 13.

[Dr. Butler](#) is an Assistant Professional Researcher at UCSF's Department of Family and Community Medicine, as well as our Center for the Study of Adversity and Cardiovascular Disease. He is also a leader in UCSF's Black Health Initiative.

As an academic medical center, UCSF is known for our leadership in health care, education, and research. Dr. Butler exemplifies all of those aspects of our mission.

But what sets Dr. Butler apart is his commitment to, and activism in, the community. He holds leadership roles in the SF Branch of the NAACP, the SF African American Faith-Based Coalition, and the SF Students Back on Track Tutoring Program. Besides his PhD in medical sociology, he also holds a Masters of Divinity focused on religion and health, and today serves as an associate minister at 3<sup>rd</sup> Baptist Church.

During COVID-19, when it was clear that historical distrust of the medical community was preventing some people of color from trusting the vaccine, Dr. Butler was one of the faculty we asked to film a public service video, respecting people's concerns while assuring the safety of the vaccine.

Dr. Butler has the full support of Chancellor Sam Hawgood and University leadership, and we urge your support for his appointment.

**Amiee Alden, MPP**

Director, Local and State Government Relations

**University of California, San Francisco**

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