Honorable Board of Supervisors,

On behalf of my colleagues on the Sunshine Ordinance Task Force, I am proud to present our 2008 Annual Report which details our accomplishments for the year.

Over the last year the Task Force has, and will continue to, proactively seek opportunities for educating and advocating for open government to both the public and city departments. In addition we are developing recommended policies and procedures around the biggest open government issues to aid departments in responding to requests.

One of the most pressing open government issues facing San Francisco right now is the retention and disposal of all types of electronic documents including email. In recent years the Task Force has discovered that departments and agencies are managing these important public records in many different ways with varying degrees of success. The Task Force has an opportunity to develop best practices in this area and advocate for open government across the city. Unfortunately due to budget constraints in the Clerk of the Board’s office, we are not able to address this issue with the urgency we would like. You will see, however, leadership in this area coming from SOTF in 2009.

After continuous work throughout 2008 we are ready to finalize the legislative amendments to the Sunshine Ordinance. Over the years it has become obvious that ambiguities and omissions in the Sunshine Ordinance have created unneeded tension between city departments and the public. In the amendments, we streamline open government processes in order to relieve that tension and set up clear expectations for all parties involved. In addition, we have added language to make the Ordinance more effective. We look forward to working with each Supervisor on this very exciting initiative in 2009.

During 2008 many of the members of the Task Force have changed which put us in a position to learn from the insights of new members while relying on the experience of continuing members. With the change of the members of the Task Force we took some time to look back at our work and see what we can learn. Some of the most significant findings and our general conclusions are:
• Most of the hearings are around public records (82%) rather than open meetings (18%). Public records issues should be a focus of education, policy developments and amendment priorities.

• If a complaint results in a hearing we usually find a violation (69% of the time).

• The success of Orders of Determinations and referrals should be studied and actions & alternatives developed.

• The highest frequency violation (42%) is 67.21, "Process for Gaining Access to Public Records; Administrative Appeals". 67.21 should be a focus of education, policy developments and amendments priorities.

• We have a concentrated number of complainants: 49% of hearings were initiated by 5 unique complainants. These 5 complainants should be included in policy and amendments development and a focus of outreach efforts.

• We have a group of respondents (city departments) with multiple hearings: 65% of hearings involved 11 unique respondents. These 11 respondents should be a focus of education and outreach efforts and their feedback consulted in policy and amendments development.

We are grateful for our Assistant Administrator Chris Rustom from the Clerk of the Board’s office and thankful to Angela Cavillo for her continued commitment to open government. Budget cuts in the City Attorney’s office have lead the Task Force to aggressively streamline processes to decrease our reliance on DCA Ernie Llorente. Even during these tough economic times, Chris and Ernie’s support has remained thorough and professional.

Finally, we would like to thank the sunshine advocates and concerned members of the public who participate in this process with us providing insight, opinions and thought leadership on open government in San Francisco.

We look forward to working closely with the Board of Supervisors in 2009.

Kristin Chu
Chair
ACCOMPLISHMENTS

- The Sunshine Ordinance Task Force continued to undertake an extensive review and discussion of the Sunshine Ordinance and proposed amendments in order to clarify and streamline the process.

- Fifty-eight complaints were filed by community members in 2008. Of the 58 complaints, the Task Force issued 31 Orders of Determination, 20 to city departments, 10 to agencies and commissions and one to a member of the Board of Supervisors.

- A total of 2,429 public inquiries were responded to by the SOTF administrator.

- One hundred percent of requests made to the Task Force were responded to within five days.

- Eight potential complaints were resolved through mediation initiated by the SOTF administrator.

- The SOTF’s Deputy City Attorney provided over 60 pieces of written legal analysis on open government complaints and issues.

- The Compliance & Amendments Committee heard 15 cases and referred eight to the Ethics Commission and three to the Board of Supervisors. The Commission dismissed all eight referrals. The three letters to the Board of Supervisors was for enforcement and policy matters.

- The Complaint Committee reviewed 19 complaints and forwarded 17 to the full task force for review.

- Thirty-four complainants requested a Task Force hearing outright.

- The website for the SOTF was redesigned to provide greater access to individuals seeking information regarding open government laws.

- A new feature on the website is a chart showing all the Orders of Determination issued in 2008. The chart is also linked to the Orders, the referrals and referral agency’s responses.

- The Education, Outreach and Training Committee started the process of updating its Mission Statement and Work Program to better reflect its function and mission.
## Complaints Received or Adjudicated during 2008

<table>
<thead>
<tr>
<th>Date Received</th>
<th>Complainant</th>
<th>Department</th>
<th>Status</th>
<th>Violation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/3</td>
<td>Kimo Crossman</td>
<td>District Attorney</td>
<td>Complaint Committee 2/12/08, Task Force 2/26/08</td>
<td>No violation</td>
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<tr>
<td>1/7</td>
<td>Hank Wilson</td>
<td>Health Dept. (HPPC)</td>
<td>Complaint Committee 2/12/08, withdrawn</td>
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<tr>
<td>1/10</td>
<td>Christian Holmer</td>
<td>Mayor’s Office</td>
<td>Complaint Committee 2/12/08, Task Force 2/26/08, withdrawn</td>
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</tr>
<tr>
<td>1/10</td>
<td>Kimo Crossman</td>
<td>City Attorney</td>
<td>Complaint Committee 2/12/08, Task Force 2/26/08, contd., 3/25/08, CAC 4/9/08. Referred to Task Force, Task Force 4/22/08. Referred to Ethics (sent:5/13/08, dismissed 11/5/08)</td>
<td>67.21 (a) &amp; (i), 67.24 (b) (1) (iii)</td>
</tr>
<tr>
<td>1/10</td>
<td>Kimo Crossman</td>
<td>City Attorney</td>
<td>Complaint Committee 2/12/08, Task Force 2/26/08, 3/25/08, CAC 4/9/08. Referred to Task Force, Task Force 4/22/08. Referred to Ethics (sent:5/13/08, dismissed 11/5/08)</td>
<td>67.21 (a) &amp; (i), 67.24 (b) (1) (iii)</td>
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<tr>
<td>1/10</td>
<td>Kimo Crossman</td>
<td>City Attorney</td>
<td>Complaint Committee 2/12/08, Task Force 2/26/08 contd., 3/25/08, CAC 4/9/08. Referred to Task Force, Task Force 4/22/08. Referred to Ethics (sent:5/13/08, dismissed 11/5/08)</td>
<td>67.21 (i), 67.24 (b) (1) (iii)</td>
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<tr>
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<td>City Attorney</td>
<td>Complaint Committee 2/12/08, Task Force 2/26/08, 3/25/08, heard with 08004, CAC 4/9/08. Referred to Task Force, Task Force 4/22/08. Referred to Ethics (sent:5/13/08, dismissed 11/5/08)</td>
<td>67.21 (a) &amp; (i), 67.24 (b) (1) (iii)</td>
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<td>Stephen Worsley</td>
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<td>Patrick Monett-Shaw</td>
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<td>Complaint Committee 3/11/08, withdrawn: 2/26/08</td>
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<td>Complaint Committee 3/11/08; Task Force 3/25/08.</td>
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<td>Task Force 3/25/08, withdrawn 3/14/08</td>
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<td>Date Received</td>
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<td>Department</td>
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<td>Jason Berckart</td>
<td>Human Rights Commission</td>
<td>Unable to contact complainant</td>
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<td>Zoological Society</td>
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<td>67.15, 67.16</td>
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<td>Planning Department</td>
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<td>67.21 (b) &amp; (c)</td>
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<td>Arts Commission</td>
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<td>Department</td>
<td>Status</td>
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<td>5/29</td>
<td>Barry Taranto</td>
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<td>Task Force 6/24/08, 7/22/08, CAC 8/13/08</td>
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<td>Complaint 8/12/08, withdrawn 8/11/08</td>
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<td>6/3</td>
<td>Kimo Crossman</td>
<td>Ethics Commission</td>
<td>Task Force 7/22/08, CAC 8/13/08, 9/10/08; Task Force 9/23/08. Letter sent to BOS, Ethics</td>
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<td>City Attorney</td>
<td>Task Force 7/22/08, CAC 8/13/08, Task Force 8/26/08, 9/23/08. Letter sent to BOS, CAO</td>
<td>67.21-1 and CPRA 6253.9 (a) (i) &amp; (ii)</td>
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<td>6/25</td>
<td>Charles Pitts</td>
<td>Human Services</td>
<td>Complaint 9/9/08; Task Force 9/23/08</td>
<td>Differences settled</td>
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<td>6/27</td>
<td>Thomas Picarello</td>
<td>Supervisor McGoldrick</td>
<td>Task Force 7/22/08, 8/26/08, 9/23/08</td>
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<tr>
<td>6/30</td>
<td>Neils Welin</td>
<td>Municipal Transportation Authority</td>
<td>Complaint 8/12/08, withdrawn 7/14/08</td>
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<td>6/25</td>
<td>Juan De Anda</td>
<td>Health Dept.</td>
<td>Complaint 8/12/08 (No jurisdiction), Task Force 8/26/08 (Appeal denied)</td>
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<tr>
<td>7/8</td>
<td>Kimo Crossman</td>
<td>Supervisor Peskin</td>
<td>Task Force 8/26/08, 9/23/08, EOT 10/9/08</td>
<td>67.31 (e) &amp; 67.24 (a) (ii)</td>
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<td>7/28</td>
<td>Kin Tso</td>
<td>Animal Control and Welfare Commission</td>
<td>Task Force 8/26/08, CAC 9/10/08</td>
<td>67.15</td>
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<td>7/28</td>
<td>Allen Grossman</td>
<td>City Attorney</td>
<td>Task Force 8/26/08; 9/23/08, 10/28/08</td>
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<tr>
<td>8/1</td>
<td>Kimo Crossman</td>
<td>DTIS &amp; SFGTV</td>
<td>Task Force 8/26/08, withdrawn 8/19/08</td>
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<tr>
<td>8/1</td>
<td>Kimo Crossman</td>
<td>DTIS, SFGTV, City Administrator, Media Services, SOTF-Admin &amp; Clerk of the Board</td>
<td>Complaint 9/9/08, Task Force 9/23/08, 10/28/08 (1st cont.), 11/25/08 (2nd cont.), withdrawn 11/10/08</td>
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<td>8/5</td>
<td>Charles Pitts</td>
<td>Police Department</td>
<td>Task Force 8/26/08, withdrawn 8/11/08</td>
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<tr>
<td>Date Received</td>
<td>Complainant</td>
<td>Department</td>
<td>Status</td>
<td>Violation</td>
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<tr>
<td>8/19</td>
<td>Brian Brown</td>
<td>Building Inspection Dept.</td>
<td>Task Force 9/23/08, 10/28/08, withdrawn 10/17/08</td>
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<td>8/26</td>
<td>Barry Taranto</td>
<td>Municipal Transportation Authority</td>
<td>Complaint Committee 10/14/08, contd 11/12/08, Task Force 12/2/08</td>
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<td>8/26</td>
<td>Karl Beale</td>
<td>Rec and Park Dept. &amp; Library</td>
<td>Complaint Committee 10/14/08, Task Force 10/28/08</td>
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<tr>
<td>8/26</td>
<td>Peter Witt</td>
<td>Taxi Commission</td>
<td>Task Force 10/28/08, CAC 11/12/08</td>
<td>67.16</td>
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<td>8/26</td>
<td>Anonymous Tenants</td>
<td>Building Inspection</td>
<td>Task Force 10/28/08, withdrawn 10/27/08</td>
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<tr>
<td>9/3</td>
<td>John Caldera</td>
<td>Veteran Affairs Commission</td>
<td>Complaint 10/14/08</td>
<td>No action taken</td>
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<tr>
<td>10/17</td>
<td>Charles Pitts</td>
<td>Office of Criminal Justice</td>
<td>Task Force 11/25/08, 12/2/08</td>
<td>No violation</td>
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<tr>
<td>11/3</td>
<td>Paul Horcher</td>
<td>Planning Dept.</td>
<td>Complaint 12/09/08, Task Force 01/06/09. Referred to Education, Outreach and Training Committee</td>
<td>67.21 (a) &amp; (c)</td>
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<tr>
<td>11/13</td>
<td>Alvin Xex</td>
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<td>Complaint 12/09/08, Task Force 01/06/09. Referred to Education, Outreach and Training Committee</td>
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<td>Peter Witt</td>
<td>Taxi Commission</td>
<td>Complaint 01/13/09, Task Force 1/27/09</td>
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<td>Task Force 12/23/08, rescheduled 01/06/09, complaint 01/13/2009, Task Force 1/27/09</td>
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<td>Laborers' Union Local 261</td>
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<td>Peter Warfield</td>
<td>Capital Planning Committee</td>
<td>Task Force 01/27/09, Withdrawn 1/20/09</td>
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</tbody>
</table>
ORGANIZATION & COMMITTEE STRUCTURE

The Chair of the Task Force appoints committee chairs and its members. Each member of the Task Force must also be a member of a committee.

Ad Hoc Committees are appointed as needed. There have been several Ad Hoc Committee meetings to deal with suggested Sunshine Ordinance provisions for the City College Board, access to public meetings and public records at the San Francisco Community College District, and the San Francisco Unified School District’s proposed Open Government Policy.

The Task Force has four Standing Committees:

**Complaint Committee:** The committee monitors the complaint process and makes recommendations to the Task Force regarding how the complaints should be handled. If the efforts of the Administrator and the Deputy City Attorney fail to obtain the information to which a complainant is legally entitled, the matter will be referred to the Complaint Committee for a hearing to determine whether the Task Force has jurisdiction over the complaint, and to clarify the complaint. If jurisdiction is found, a Task Force hearing will be held at which time the complainant and the respondent will present the merits of their respective cases. See § VII, Addendum # 2 for a copy of the complaint form.

Members of the Complaint Committee are Nick Goldman (Chair); Doyle Johnson and James Knoebber.

**Compliance & Amendments Committee:** This Committee was appointed in 2002. This Committee monitors compliance with the Orders of Determinations adopted by the Task Force and recommends to the Task Force amendments to the Sunshine Ordinance regarding enforcement of the Orders of Determination. The Committee also considers recommendations, amendments, and changes to the Sunshine Ordinance as provided by members of the Task Force, City departments, and the general public.

Members of the Compliance and Amendments Committee are Richard Knee (Chair), Erica Craven-Green and Doyle Johnson.

**Education, Outreach, and Training Committee:** The Education, Outreach and Training Committee may monitor compliance with the Orders of Determination adopted by the Task Force; shall make recommendations to the Task Force regarding outreach and publicity to the media and to the general public about the Sunshine Ordinance and the Task Force.

Members of the Education, Outreach, and Training Committee are Sue Cauthen (Chair); Marjorie Williams, Doyle Johnson, Allyson Washburn and Hanley Chan.

**Rules Committee:** This committee was established to review matters related to amendments to the Task Force by-laws and procedures so the Task Force’s work could proceed in an orderly manner. The committee also helps to ensure that all annual objectives enumerated in the Sunshine Ordinance are met by the Task Force. As with all committees, recommendations for action are made to the full Task Force for final action.
Members of the Rules Committee are Doyle Johnson (Chair), Kristin Chu and Hanley Chan.

ADDENDA

1. Membership of Task Force

2. Complaint Form and Overview of Procedures

3. Sunshine Ordinance Task Force Web Page Contents
SUNSHINE ORDINANCE TASK FORCE
MEMBERS DURING 2008

Seat 1  Submitted by the local chapter of the Society of Professional Journalists and be an attorney.
Appt 8/25/04, reappointed 5/27/08.
Erica L. Craven-Green
Term ends 4/10
District 8

Seat 2  Submitted by the local chapter of the Society of Professional Journalists and be a journalist.
Appt 5/3/02, reappointed 5/27/08
Richard Knee
Term ends 4/10
District 3

Seat 3  Member of the press or electronic media with an interest in citizen access.
Appt 5/3/02, reappointed 5/27/08
Sue Cauthen
Term ends 4/10
District 3

Seat 4  Appointed from names submitted by New California Media now know as New America Media; be a journalist from a racial/ethnic-minority-owned news organization.
Pueng Vongs appt 4/1/06, resigned 2/13/07
Ketaki Gokhale appt 5/27/08, resigned 9/2/08
Vacant

Seat 5  Submitted by the League of Women Voters.
Replaced Kristin Chu. Appt 5/27/08
Allyson Washburn
Term ends 4/10
District 2

Seat 6  Experienced in consumer advocacy.
Replaced Doug Comstock. Appt 6/20/08:
James Knoebber
Term ends 4/10
District 3

Seat 7  Experienced in consumer advocacy.
Replaced David Pilpel. Appt 11/7/08
Doyle Johnson
Term ends 4/10
District 8

Seat 8  Demonstrated interest in or has experience in the issues of citizen access and participation in local government.
Replaced Bruce Wolfe. Appt 5/27/08
Kristin Chu
Term ends 4/10
District 1

Seat 9  Demonstrated interest in or has experience in the issues of citizen access and participation in local government.
Appt 4/1/06, reappointed 5/27/08
Hanley Chan
Term ends 4/10
District 3

Seat 10 Demonstrated interest in or has experience in the issues of citizen access and participation in local government.
Appt 6/2/05. Reappointed 5/27/08
Nick Goldman
Term ends 4/10
District 8

Seat 11 Demonstrated interest in or has experience in the issues of citizen access and participation in local government.
Appt 5/25/01; re-appointed 5/9/03; 6/2/05; 1/14/08
Marjorie A. Williams
Term ends 4/09
District 10

Ex-Officio  Clerk of the Board or her designee (non-voting): Gloria Young served from 1/06 to 4/07, Angela Calvillo served from 7/07 to 2/09
Tanene A. Allison
Begins 3/09

Ex-Officio  Mayor or his designee (non-voting)
Richard Sklar (replaced Harrison Sheppard)7/30/08 - 1/27/09
(Vacant)
Thank you for your interest in the implementation of the San Francisco Sunshine Ordinance.

The Sunshine Ordinance adopted by the citizens of the City & County of San Francisco declares that:

(a) Government's duty is to serve the public, reaching its decisions in full view of the public.

(b) Commissions, boards, councils and other agencies of the City and County exist to conduct the people's business. This ordinance will assure that their deliberations are conducted before the people and that City operations are open to the people's review.

The role of the Sunshine Ordinance Task Force is to advise the Board of Supervisors and provide information to other City departments on appropriate ways in which to implement the Ordinance. The Task Force is responsible for developing appropriate goals to ensure the practical and timely implementation of the Ordinance and to report to the Board on practical or policy problems encountered in the administration of the Ordinance.

If you have encountered problems regarding compliance with the Ordinance, the Public Records Act or the Ralph M. Brown (Public Meetings) Act, we ask that you fill out the attached complaint form. Please deliver the form to Frank Darby, Administrator of the Sunshine Ordinance Task Force, City Hall, Room 244, 1 Dr. Carlton B. Goodlett Place, San Francisco, CA 94102-4683.

We attempt to resolve complaints informally where possible, through the affected departments and the City Attorney's office. Matters that cannot be adequately resolved, or matters that involve substantial policy considerations, may be set for hearing at a Task Force meeting. The Task Force meets the fourth Tuesday of each month at 4:00 p.m. at City Hall, Room 408.

Notice: Personal information that you provide is subject to disclosure under the California Public Records Act and the Sunshine Ordinance, except when confidentiality is specifically requested. Complainants can be anonymous as long as the complainant provides a reliable means of contact with the SOTF (Phone number, fax number, or e-mail address).
SUNSHINE ORDINANCE TASK FORCE
1 Dr. Carlton B. Goodlett Place, Room 244, San Francisco CA 94102
Tel. (415) 554-7724; Fax (415) 554-7854
http://www.sfgov.org/sunshine

SUNSHINE ORDINANCE COMPLAINT

Complaint against which Department or Commission

Name of individual contacted at Department or Commission

☐ Alleged violation public records access
☐ Alleged violation of public meeting. Date of meeting

Sunshine Ordinance Section

(If known, please cite specific provision(s) being violated)

Please describe alleged violation. Use additional paper if needed. Please attach any relevant documentation supporting your complaint.

Do you want a public hearing before the Sunshine Ordinance Task Force? ☐ yes ☐ no
Do you also want a pre-hearing conference before the Complaint Committee? ☐ yes ☐ no

(Optional)¹
Name ___________________________ Address ___________________________
Telephone No. ___________________________ E-Mail Address ___________________________
Date ___________________________ Signature ___________________________

I request confidentiality of my personal information. ☐ yes ☐ no

¹ NOTICE: PERSONAL INFORMATION THAT YOU PROVIDE MAY BE SUBJECT TO DISCLOSURE UNDER THE CALIFORNIA PUBLIC RECORDS ACT AND THE SUNSHINE ORDINANCE, EXCEPT WHEN CONFIDENTIALITY IS SPECIFICALLY REQUESTED. YOU MAY LIST YOUR BUSINESS/OFFICE ADDRESS, TELEPHONE NUMBER AND E-MAIL ADDRESS IN LIEU OF YOUR HOME ADDRESS OR OTHER PERSONAL CONTACT INFORMATION. Complainants can be anonymous as long as the complainant provides a reliable means of contact with the SOTF (Phone number, fax number, or e-mail address).
Filing a Complaint with the Sunshine Ordinance Task Force

1. You may fill out a Complaint Form, or you may send your own letter filing a formal complaint. The complaint is filed with the Sunshine Ordinance Task Force, 1 Dr. Carlton B. Goodlett Pl., Room 244, San Francisco CA 94102-4689. (Fax # 415 554 7854)

2. Once your complaint is received, the Complaint Committee of the Sunshine Ordinance Task Force reviews the complaint to determine if the Sunshine Ordinance Task Force has jurisdiction.

- Jurisdiction is defined as those items the Task Force may address as outlined in the Sunshine Ordinance

3. Once the Complaint Committee completes its consideration, the complainant is notified of the Committee’s decision.

4. If the Complaint Committee finds no jurisdiction over the alleged violations in the complaint, the complainant could request reconsideration before the full Task Force at its next scheduled meeting. Should the full Task Force find jurisdiction, a full hearing on the merits would be scheduled.

5. If the Complaint Committee finds the Task Force has jurisdiction, the complainant, respondent, and the Task Force Members are notified in writing of the jurisdiction decision, and the specific matters, which the Complaint Committee has found jurisdiction.

6. The complaint is then scheduled for a hearing before the next meeting of the Sunshine Ordinance Task Force.

7. If additional information is to be submitted from the complainant or respondent, the additional material must be submitted to the Sunshine Ordinance Task Force Administrator at least seven days before the scheduled hearing before the Task Force.

   (a) If the complainant submits any additional material after the seven day deadline, the complainant will be informed that

   - The Task Force may proceed without considering the new material, or
   - The complainant may waive the 45-day time line set and continue the hearing to the next Task Force meeting (the question to be the matter on which the Complaint Committee has granted jurisdiction), or
   - The complainant may withdraw the complaint and file a new complaint to be considered by the Complaint Committee, or
   - The complainant may proceed to hearing with their current complaint and file a new complaint and use the new information to support the freestanding separate complaint.

8. After the Task Force completes its public hearing, the Task Force would make an Order of Determination regarding the complaint.

9. For further information, contact the Sunshine Ordinance Task Force Administrator at (415) 554 7724.
In 2008 the Sunshine Ordinance Task Force web page received 3,738,109 hits. The web page consists of:

- Current agendas and minutes
- Meeting notices
- Past years’ agendas and minutes
- Public records listing and retention schedule
- By-laws of the Task Force
- Other related documents and information

Information on:

- The Sunshine Ordinance
- Membership of the Task Force
- Committee structure of the Task Force
- Non-profit requirements (Administrative Code, Chapter 12L)
- Duties and responsibilities of the Task Force
- Complaint Procedures and Form
- Frequently asked questions