

File No. 21148

Item No. 11

SUNSHINE ORDINANCE TASK FORCE  
AGENDA PACKET CONTENTS LIST

Sunshine Ordinance Task Force

Date: November 2, 2022

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OTHER

Completed by: C. Leger Date 10/28/22

\* An asterisked item represents the cover sheet to a document that exceeds 25 pages.  
The complete document is in the file on a disk

**Sunshine Ordinance Task Force  
Complaint Summary**

File No. 21148

Karl Kramer and Jordan Santagatas v. San Francisco Employees' Retirement System

Date filed with SOTF: 10/26/21

Contact information (Complainant information listed first):

Jordan Santagata ([jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu), Karl Kramer [Sflivingwage@riseup.net](mailto:Sflivingwage@riseup.net))  
(Complainants)

San Francisco Employees' Retirement System ([sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)); (Respondent)

**File No. 21148:** Complaint filed by Jordan Santagatas and Karl Kramer against the San Francisco Employees' Retirement System for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24, and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.

**Administrative Summary if applicable:**

10/5/21 request for the following:

Requesting an opportunity to obtain copies of any  
past or current contracts dated all years 2015 through and including  
2021 that detail all contracts between the City of San Francisco and the  
following vendors:

**Vista Equity Partners**

10/26/21 – the Respondent stated that the requested material is not subject to disclosure pursuant to CPRA to 6254.26.

**Complaint Attached.**

# Petition/Complaint

**Leger, Cheryl (BOS)**

---

**From:** Jordan Santagata <jordan.santagata@sjsu.edu>  
**Sent:** Tuesday, October 26, 2021 12:02 PM  
**To:** SOTF, (BOS)  
**Cc:** sflivingwage@riseup.net  
**Subject:** Fwd: SF Living Wage Coalition Information Request

Forwarding the email chain with the RET Department (SFERS).

Jordan

----- Forwarded message -----

**From:** RET - SFERS, Info <sfersinfo@sfgov.org>  
**Date:** Thu, Oct 7, 2021 at 11:29 AM  
**Subject:** RE: SF Living Wage Coalition Information Request  
**To:** [jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu) <[jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu)>

Good morning,

The requested materials are not subject to public disclosure in accordance with California Government Code 6254.26.

Kind regards,

SFERS



**From:** Jordan Santagata <[jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu)>  
**Sent:** Tuesday, October 5, 2021 5:18 PM  
**To:** RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)>  
**Subject:** SF Living Wage Coalition Information Request

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

San Francisco Living Wage Coalition  
2940 16th Street #301  
San Francisco, California 94103

10/5/21

Dear Custodian of Records at the RET Department:

In accordance with the San Francisco Sunshine Ordinance (Chapter 67 of the San Francisco Administrative Code) and the California Public Records Act (California Govt. Code § 6250 et seq)., more specifically:

Article III: Public Information and Public Records

Sec. 67.24. Public Information That Must Be Disclosed.

Notwithstanding a department's legal discretion to withhold certain information under the California Public Records Act, the following policies shall govern specific types of documents and information and shall provide enhanced rights of public access to information and records:

(b) Litigation Material.

(ii) A record previously received or created by a department in the ordinary course of business that was not attorney/client privileged when it was previously received or created;

(e) Contracts, Bids and Proposals

(iii) Any franchise agreements,

All documents exchanged and related to the position of the parties, including draft contracts, shall be made available for public inspection and copying upon request. In the event that no records are prepared or exchanged during negotiations in the above-mentioned categories, or the records exchanged do not provide a meaningful representation of the respective positions, the city attorney or city representative familiar with the negotiations shall, upon a written request by a member of the public, prepare written summaries of the respective positions within five working days following the final day of negotiation of any given week. The summaries will be available for public inspection and copying. Upon completion of negotiations, the executed contract, including the dollar amount of said contract, shall be made available for inspection and copying. At the end of each fiscal year, each City department shall provide to the Board of Supervisors a list of all sole source contracts entered into during the past fiscal year. This list shall be made available for inspection and copying as provided for elsewhere in this Article.

(f) Budgets and Other Financial Information. Budgets, whether tentative, proposed or adopted, for the City or any of its departments,

programs, projects or other categories, and all bills, claims, invoices, vouchers or other records of payment obligations as well as records of actual disbursements showing the amount paid, the payee and the purpose for which payment is made, other than payments for social or other services whose records are confidential by law, shall not be exempt from disclosure under any circumstances.\_

I am requesting an opportunity to obtain copies of any past or current contracts dated all years 2015 through and including 2021 that detail all contracts between the City of San Francisco and the following vendors:

**Vista Equity Partners**

If there are any fees for searching or copying these records, please inform me of the cost, however, I would also like to request a waiver of all fees in that the disclosure of the requested information is in the public interest and will contribute significantly to the public's understanding of your department's allocation of city funds. This information is not being sought for commercial purposes.

\_Sec. 67.25. Immediacy Of Response, requires a response within ten business days. If access to the records I am requesting will take longer, please contact me with information about when I might expect copies or the ability to inspect the requested records.

If you deny any or all of this request, please cite each specific exemption you feel justifies the refusal to release the information and notify me of the appeal procedures available to me under the law.

Thank you for considering my request.

Sincerely,  
Jordan Santagata  
Intern-San Francisco Living Wage Coalition  
[Sflivingwage@riseup.net](mailto:Sflivingwage@riseup.net)

--

SJSU Club Sports Program Assistant

**Leger, Cheryl (BOS)**

---

**From:** Jordan Santagata <jordan.santagata@sjsu.edu>  
**Sent:** Tuesday, October 26, 2021 12:35 PM  
**To:** SOTF, (BOS)  
**Subject:** Re: SF Living Wage Coalition Information Request  
**Attachments:** image001.png; image002.png

Hello,

Yes, meant to send this as a reply to the email you sent me yesterday. Yes we are looking to open a complaint. This is the only email exchange we have had.

Thanks,  
Jordan Santagata

On Tue, Oct 26, 2021, 12:29 PM SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)> wrote:

Dear Jordan: From this email chain, are you requesting that a complaint file be opened?

Cheryl Leger

Assistant Clerk, Board of Supervisors

[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)

Tel: 415-554-7724

Fax: 415-554-5163

[www.sfbos.org](http://www.sfbos.org)



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The [Legislative Research Center](#) provides 24-hour access to Board of Supervisors legislation, and archived matters since August 1998.

*Disclosures: Personal information that is provided in communications to the Board of Supervisors is subject to disclosure under the California Public Records Act and the San Francisco Sunshine Ordinance. Personal information provided will not be redacted. Members of the public are not required to provide personal identifying information when they communicate with the Board of Supervisors and its committees. All written or oral communications that members of the public submit to the Clerk's Office regarding pending legislation or hearings will be made available to all members of the public for inspection and copying. The Clerk's Office does not redact any information from these submissions. This means that personal information—including names, phone numbers, addresses and similar information that a member of the public elects to submit to the Board and its committees—may appear on the Board of Supervisors website or in other public documents that members of the public may inspect or copy.*

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**Cc:** [sflivingwage@riseup.net](mailto:sflivingwage@riseup.net)  
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Forwarding the email chain with the RET Department (SFERS).

Jordan

----- Forwarded message -----

**From:** RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)>  
**Date:** Thu, Oct 7, 2021 at 11:29 AM  
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**To:** [jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu) <[jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu)>

Good morning,

The requested materials are not subject to public disclosure in accordance with California Government Code 6254.26.

Kind regards,

SFERS





**From:** Jordan Santagata <[jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu)>  
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San Francisco Living Wage Coalition  
2940 16th Street #301  
San Francisco, California 94103

10/5/21

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Article III: Public Information and Public Records

Sec. 67.24. Public Information That Must Be Disclosed.

Notwithstanding a department's legal discretion to withhold certain information under the California Public Records Act, the following policies shall govern specific types of documents and information and shall provide enhanced rights of public access to information and records:

(b) Litigation Material.

(ii) A record previously received or created by a department in the ordinary course of business that was not attorney/client privileged when it was previously received or created;

(e) Contracts, Bids and Proposals

(iii) Any franchise agreements,

All documents exchanged and related to the position of the parties, including draft contracts, shall be made available for public inspection and copying upon request. In the event that no records are prepared or exchanged during negotiations in the above-mentioned categories, or the records exchanged do not provide a meaningful representation of the respective positions, the city attorney or city representative familiar with the negotiations shall, upon a written request by a member of the public, prepare written summaries of the respective positions within five working days following the final day of negotiation of any given

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I am requesting an opportunity to obtain copies of any past or current contracts dated all years 2015 through and including 2021 that detail all contracts between the City of San Francisco and the following vendors:

**Vista Equity Partners**

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\_Sec. 67.25. Immediacy Of Response, requires a response within ten business days. If access to the records I am requesting will take longer, please contact me with information about when I might expect copies or the ability to inspect the requested records.

If you deny any or all of this request, please cite each specific exemption you feel justifies the refusal to release the information and notify me of the appeal procedures available to me under the law.

Thank you for considering my request.

Sincerely,  
Jordan Santagata  
Intern-San Francisco Living Wage Coalition  
[Sflivingwage@riseup.net](mailto:Sflivingwage@riseup.net)

**Leger, Cheryl (BOS)**

---

**From:** Jordan Santagata <jordan.santagata@sjsu.edu>  
**Sent:** Thursday, October 28, 2021 9:09 AM  
**To:** SOTF, (BOS)  
**Subject:** Re: SF Living Wage Coalition Information Request  
**Attachments:** image001.png

SF Employees Retirement System. Also, we would like both my name and Karl Kramer ([sflivingwage@riseup.net](mailto:sflivingwage@riseup.net)) on the complaint.

Thanks,  
Jordan

On Wed, Oct 27, 2021, 5:53 PM SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)> wrote:

I can open a complaint if you tell me what RET is?

Cheryl Leger

Assistant Clerk, Board of Supervisors

[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)

Tel: 415-554-7724

Fax: 415-554-5163

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**To:** SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)>  
**Subject:** Re: SF Living Wage Coalition Information Request

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**Cc:** [sflivingwage@riseup.net](mailto:sflivingwage@riseup.net)  
**Subject:** Fwd: SF Living Wage Coalition Information Request

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**Date:** Thu, Oct 7, 2021 at 11:29 AM  
**Subject:** RE: SF Living Wage Coalition Information Request  
**To:** [jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu) <[jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu)>

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San Francisco Living Wage Coalition  
2940 16th Street #301  
San Francisco, California 94103

10/5/21

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\_(iii) Any franchise agreements,\_

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#### **Vista Equity Partners**

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Thank you for considering my request.

Sincerely,

Jordan Santagata  
Intern-San Francisco Living Wage Coalition  
[Sflivingwage@riseup.net](mailto:Sflivingwage@riseup.net)

--

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SJSU Club Sports Program Assistant



**Leger, Cheryl (BOS)**

---

**From:** San Francisco Living Wage <sflivingwage@gmail.com>  
**Sent:** Monday, November 22, 2021 2:46 PM  
**To:** SOTF, (BOS)  
**Cc:** Jordan Santagata  
**Subject:** Re: FW: SOTF - Complaint Filed with the Sunshine Ordinance Task Force - File No. 21148

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

Hi Cheryl,

Jordan and I discussed this and she could not find any comparable language in the Sunshine Ordinance. The question we have is whether the state law preempts the local law or if the Sunshine Ordinance can be broader.

Regards,  
Karl

On Mon, Nov 22, 2021 at 1:40 PM SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)> wrote:

Please see respondent's response.

Cheryl Leger

Assistant Clerk, Board of Supervisors

[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)

Tel: 415-554-7724

Fax: 415-554-5163

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---

**From:** Worsfold, Stephen (RET) <[stephen.worsfold@sfgov.org](mailto:stephen.worsfold@sfgov.org)>  
**Sent:** Monday, November 22, 2021 1:22 PM  
**To:** SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)>  
**Subject:** RE: SOTF - Complaint Filed with the Sunshine Ordinance Task Force - File No. 21148

Good afternoon,

Please see attached SFERS response to SOTF Complaint File No. 21148. Feel free to send any updates to my email address [stephen.worsfold@sfgov.org](mailto:stephen.worsfold@sfgov.org).

Kind regards,

Stephen Worsfold

SFERS Custodian of Records

---

**From:** SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)>  
**Sent:** Tuesday, November 16, 2021 4:09 PM  
**To:** RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)>  
**Cc:** San Francisco Living Wage <[sflivingwage@gmail.com](mailto:sflivingwage@gmail.com)>; Jordan Santagata <[jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu)>  
**Subject:** SOTF - Complaint Filed with the Sunshine Ordinance Task Force - File No. 21148

Good Afternoon:

The San Francisco Employees Retirement System has been named as a Respondent in the attached complaint filed with the Sunshine Ordinance Task Force (SOTF). In an effort to provide the SOTF information in an easy

to understand format the SOTF has prepared a revised request format for responding to complaints (attached). The SOTF encourages you to use the attached "Respondent – Requested Information and Format" in preparing your response to the attached complaint. Your input into the requested information would be appreciated as the SOTF evaluates the request response format to streamline the complaint process. **The SOTF is requesting that you submit your response to the allegations including any and all supporting documents, recordings, electronic media, etc., to the Task Force within five (5) business days of receipt of this notice.** In developing and submitting your response, please use the attached instructions, "Preparing San Francisco Sunshine Ordinance Task Force Respondents Materials," to address your defense of this complaint. This is your opportunity to provide a detailed explanation to allow the Task Force to be fully informed in considering your response prior to the meeting.

Please include the following information in your response if applicable:

1. List all relevant records with descriptions that have been provided pursuant to the Complainant request.
2. Date the relevant records were provided to the Complainant.
3. Description of the method used, along with any relevant search terms used, to search for the relevant records.
4. Statement/declaration that all relevant documents have been provided, does not exist, or has been excluded.
5. Copy of the original request for records (if applicable).
6. Statement/declaration that all relevant documents have been provided, does not exist, or

Acknowledgement of noncompliance with the Sunshine Ordinance or declaration of no-contest.

Please refer to the File Number when submitting any new information and/or supporting documents pertaining to this complaint.

The Complainant alleges:

*Complaint Attached.*

Cheryl Leger

Assistant Clerk, Board of Supervisors

Tel: 415-554-7724



Click to complete a Board of Supervisors Customer Service Satisfaction form.

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**Leger, Cheryl (BOS)**

---

**From:** San Francisco Living Wage <sflivingwage@gmail.com>  
**Sent:** Wednesday, December 22, 2021 7:16 PM  
**To:** RET - SFERS, Info  
**Cc:** SOTF, (BOS)  
**Subject:** Re: SOTF - Sunshine Task Force Complaint Committee Agenda, December 21, 2021

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

Received. Thank you.

On Wed, Dec 22, 2021 at 4:48 PM RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)> wrote:

Good afternoon,

As discussed during yesterday's meeting please see below a link to the March 11, 2020 CIO report, which lists the most recent disclosure of an investment with Vesta Equity Partners.

<https://mysfers.org/wp-content/uploads/2020/03/03112020-11.pdf>

Kind regards,

SFERS

---

**From:** SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)>  
**Sent:** Friday, December 17, 2021 3:06 PM  
**To:** Claudia Ovalles <[inbox.ovalles@gmail.com](mailto:inbox.ovalles@gmail.com)>; Burke, Robyn (DAT) <[robyn.burke@sfgov.org](mailto:robyn.burke@sfgov.org)>; Boudin, Chesa (DAT) <[chesa@sfgov.org](mailto:chesa@sfgov.org)>; Ahimsa Porter Sumchai MD <[AhimsaPorterSumchaiMD@comcast.net](mailto:AhimsaPorterSumchaiMD@comcast.net)>; Heckel, Hank (MYR) <[hank.heckel@sfgov.org](mailto:hank.heckel@sfgov.org)>; micah.fobbs@hpscac.com; [info@hpscac.com](mailto:info@hpscac.com); [alise@hpscac.com](mailto:alise@hpscac.com); Jordan Santagata <[jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu)>; San Francisco Living Wage <[sflivingwage@gmail.com](mailto:sflivingwage@gmail.com)>; RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)>; Worsfold, Stephen (RET) <[stephen.worsfold@sfgov.org](mailto:stephen.worsfold@sfgov.org)>; Son, Chanbory (CPC) <[chanbory.son@sfgov.org](mailto:chanbory.son@sfgov.org)>; Hillis, Rich (CPC) <[rich.hillis@sfgov.org](mailto:rich.hillis@sfgov.org)>; [dratlerj@gmail.com](mailto:dratlerj@gmail.com); [sfneighborhoods.net](mailto:sfneighborhoods.net) <[info@sfneighborhoods.net](mailto:info@sfneighborhoods.net)>; Gerull, Linda (TIS) <[linda.gerull@sfgov.org](mailto:linda.gerull@sfgov.org)>; PORTER, KATHARINE (CAT) <[Katharine.Porter@sfcityatty.org](mailto:Katharine.Porter@sfcityatty.org)>; COOLBRITH, ELIZABETH (CAT) <[Elizabeth.Coolbrith@sfcityatty.org](mailto:Elizabeth.Coolbrith@sfcityatty.org)>; KWART, JEN (CAT) <[Jen.Kwart@sfcityatty.org](mailto:Jen.Kwart@sfcityatty.org)>; [barbaraqtaylor@gmail.com](mailto:barbaraqtaylor@gmail.com); Sergei Severinov <[serolga@yahoo.com](mailto:serolga@yahoo.com)>; Maunder, Sara (DPA) <[sara.maunder@sfgov.org](mailto:sara.maunder@sfgov.org)>; Rosenstein, Diana (DPA) <[diana.rosenstein@sfgov.org](mailto:diana.rosenstein@sfgov.org)>

**Cc:** Young, Victor (BOS) <[victor.young@sfgov.org](mailto:victor.young@sfgov.org)>

**Subject:** SOTF - Sunshine Task Force Complaint Committee Agenda, December 21, 2021

Good Afternoon:

The agenda and packet for the of the Sunshine Ordinance Task Force Complaint Committee December 21, 2021, 5:30 p.m. meeting is online at the following link:

[https://sfgov.org/sunshine/sites/default/files/complaint\\_122121\\_agenda.pdf](https://sfgov.org/sunshine/sites/default/files/complaint_122121_agenda.pdf)

The packet material is linked to each item listed on the agenda marked with an "attachment". Click anywhere on the title of the item to open the link to the pdf of the packet material in question.

Cheryl Leger

Assistant Clerk, Board of Supervisors

[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)

Tel: 415-554-7724

Fax: 415-554-5163

[www.sfbos.org](http://www.sfbos.org)



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# Respondent's Response

**Leger, Cheryl (BOS)**

---

**From:** Jordan Santagata <jordan.santagata@sjsu.edu>  
**Sent:** Tuesday, October 5, 2021 5:18 PM  
**To:** RET - SFERS, Info  
**Subject:** SF Living Wage Coalition Information Request

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

San Francisco Living Wage Coalition  
2940 16th Street #301  
San Francisco, California 94103

10/5/21

Dear Custodian of Records at the RET Department:

In accordance with the San Francisco Sunshine Ordinance (Chapter 67 of the San Francisco Administrative Code) and the California Public Records Act (California Govt. Code § 6250 et seq.), more specifically:

Article III: Public Information and Public Records

Sec. 67.24. Public Information That Must Be Disclosed.

Notwithstanding a department's legal discretion to withhold certain information under the California Public Records Act, the following policies shall govern specific types of documents and information and shall provide enhanced rights of public access to information and records:

(b) Litigation Material.

(ii) A record previously received or created by a department in the ordinary course of business that was not attorney/client privileged when it was previously received or created;

(e) Contracts, Bids and Proposals

(iii) Any franchise agreements,

All documents exchanged and related to the position of the parties, including draft contracts, shall be made available for public inspection and copying upon request. In the event that no records are prepared or exchanged during negotiations in the above-mentioned categories, or the records exchanged do not provide a meaningful representation of the respective positions, the city attorney or city representative familiar with the negotiations shall, upon a written request by a member of the



public, prepare written summaries of the respective positions within five working days following the final day of negotiation of any given week. The summaries will be available for public inspection and copying. Upon completion of negotiations, the executed contract, including the dollar amount of said contract, shall be made available for inspection and copying. At the end of each fiscal year, each City department shall provide to the Board of Supervisors a list of all sole source contracts entered into during the past fiscal year. This list shall be made available for inspection and copying as provided for elsewhere in this Article.\_

\_(f) Budgets and Other Financial Information. Budgets, whether tentative, proposed or adopted, for the City or any of its departments, programs, projects or other categories, and all bills, claims, invoices, vouchers or other records of payment obligations as well as records of actual disbursements showing the amount paid, the payee and the purpose for which payment is made, other than payments for social or other services whose records are confidential by law, shall not be exempt from disclosure under any circumstances.\_

I am requesting an opportunity to obtain copies of any past or current contracts dated all years 2015 through and including 2021 that detail all contracts between the City of San Francisco and the following vendors:

#### **Vista Equity Partners**

If there are any fees for searching or copying these records, please inform me of the cost, however, I would also like to request a waiver of all fees in that the disclosure of the requested information is in the public interest and will contribute significantly to the public's understanding of your department's allocation of city funds. This information is not being sought for commercial purposes.

\_Sec. 67.25. Immediacy Of Response, requires a response within ten business days. If access to the records I am requesting will take longer, please contact me with information about when I might expect copies or the ability to inspect the requested records.

If you deny any or all of this request, please cite each specific exemption you feel justifies the refusal to release the information and notify me of the appeal procedures available to me under the law.

Thank you for considering my request.

Sincerely,  
Jordan Santagata  
Intern-San Francisco Living Wage Coalition  
[Sflivingwage@riseup.net](mailto:Sflivingwage@riseup.net)



**Leger, Cheryl (BOS)**

---

**From:** Worsfold, Stephen (RET)  
**Sent:** Monday, November 22, 2021 1:22 PM  
**To:** SOTF, (BOS)  
**Subject:** RE: SOTF - Complaint Filed with the Sunshine Ordinance Task Force - File No. 21148  
**Attachments:** SOTF Response File 21148.pdf; SF Living Wage Coalition Information Request

Good afternoon,

Please see attached SFERS response to SOTF Complaint File No. 21148. Feel free to send any updates to my email address [stephen.worsfold@sfgov.org](mailto:stephen.worsfold@sfgov.org).

Kind regards,

Stephen Worsfold  
SFERS Custodian of Records

**From:** SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)>  
**Sent:** Tuesday, November 16, 2021 4:09 PM  
**To:** RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)>  
**Cc:** San Francisco Living Wage <[sflivingwage@gmail.com](mailto:sflivingwage@gmail.com)>; Jordan Santagata <[jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu)>  
**Subject:** SOTF - Complaint Filed with the Sunshine Ordinance Task Force - File No. 21148

Good Afternoon:

The San Francisco Employees Retirement System has been named as a Respondent in the attached complaint filed with the Sunshine Ordinance Task Force (SOTF). In an effort to provide the SOTF information in an easy to understand format the SOTF has prepared a revised request format for responding to complaints (attached). The SOTF encourages you to use the attached "Respondent – Requested Information and Format" in preparing your response to the attached complaint. Your input into the requested information would be appreciated as the SOTF evaluates the request response format to streamline the complaint process. **The SOTF is requesting that you submit your response to the allegations including any and all supporting documents, recordings, electronic media, etc., to the Task Force within five (5) business days of receipt of this notice.** In developing and submitting your response, please use the attached instructions, "Preparing San Francisco Sunshine Ordinance Task Force Respondents Materials," to address your defense of this complaint. This is your opportunity to provide a detailed explanation to allow the Task Force to be fully informed in considering your response prior to the meeting.

Please include the following information in your response if applicable:

1. List all relevant records with descriptions that have been provided pursuant to the Complainant request.
2. Date the relevant records were provided to the Complainant.
3. Description of the method used, along with any relevant search terms used, to search for the relevant records.
4. Statement/declaration that all relevant documents have been provided, does not exist, or has been excluded.
5. Copy of the original request for records (if applicable).

6. Statement/declaration that all relevant documents have been provided, does not exist, or Acknowledgement of noncompliance with the Sunshine Ordinance or declaration of no-contest.

Please refer to the File Number when submitting any new information and/or supporting documents pertaining to this complaint.

The Complainant alleges:  
*Complaint Attached.*

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
Tel: 415-554-7724



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November 22, 2021

Sunshine Ordinance Task Force  
c/o Cheryl Ledger  
Assistant Clerk, Board of Supervisors  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102

Re: File No. 21148

We are in receipt of the above-referenced complaint and are submitting this written response as required. The San Francisco Employees' Retirement System (SFERS) is in receipt of Complaint filed by Karl Kramer and Jordan Santagatas with the Sunshine Ordinance Task Force (SOTF) alleging that SFERS violated Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24, and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.

On October 5, 2021 Jordan Santagatas emailed SFERS requesting an opportunity to obtain copies of any past or current contracts dated all years 2015 through and including 2021 that detail all contracts between the City of San Francisco and the following vendors: Vista Equity Partners.

SFERS responded to this request on October 7, 2021 informing Jordan Santagatas that the requested materials were not subject to public disclosure in accordance to California Government Code Section 6254.26 which provides, in part, as follows:

- (a) Notwithstanding any provision of this chapter or other law, the following records regarding alternative investments in which public investment funds invest shall not be subject to disclosure pursuant to this chapter, unless the information has already been publicly released by the keeper of the information... (6) Alternative investment agreements and all related documents.

Vista Equity Partners is an alternative investment in the SFERS portfolio. SFERS' investment relationship with Vista Equity Partners is as a limited partner (the most common investment structure for alternative investments) with specific non-disclosure covenants. The requested document has not already been publicly released. The requested "alternative investment agreement" is specifically exempted from public disclosure pursuant to California Government Code Section 6254.26(a)(6).

Kind regards,

Stephen Worsfold  
Custodian of Records  
San Francisco Employees' Retirement System

ATTACHMENT: Email correspondence with Jordan Santagatas

**Leger, Cheryl (BOS)**

---

**From:** RET - SFERS, Info  
**Sent:** Tuesday, December 14, 2021 8:33 AM  
**To:** SOTF, (BOS)  
**Subject:** RE: SOTF - Complaint Committee hearing, December 21, 2021; 5:30 PM; remote meeting;

Good morning Cheryl,

I was wondering if our initial response to the complaint will be added to the meeting materials or if we needed to resend. I will need to confirm, but I don't think we have any additional evidence besides what was included in our original response.

Thanks for your help,

Stephen Worsfold

**From:** SOTF, (BOS) <sotf@sfgov.org>  
**Sent:** Tuesday, December 7, 2021 8:59 AM  
**To:** Lynch, Laura (CPC) <laura.lynch@sfgov.org>; Son, Chanbory (CPC) <chanbory.son@sfgov.org>; dratlerj@gmail.com; San Francisco Living Wage <sflivingwage@gmail.com>; Jordan Santagata <jordan.santagata@sjsu.edu>; RET - SFERS, Info <sfersinfo@sfgov.org>  
**Subject:** SOTF - Complaint Committee hearing, December 21, 2021; 5:30 PM; remote meeting;

Good Morning:

Notice is hereby given that the Complaint Committee (Committee) of the Sunshine Ordinance Task Force (Task Force) shall hold hearings on complaints listed below to: 1) determine if the Task Force has jurisdiction; 2) review the merits of the complaints; and/or 3) issue a report and/or recommendation to the Task Force.

**Date:** December 21, 2021

**Location:** Remote Meeting

**Time:** 5:30 p.m.

**Complainants:** Your attendance is required for this meeting/hearing.

**Respondents/Departments:** Pursuant to Section 67.21 (e) of the Ordinance, the custodian of records or a representative of your department, who can speak to the matter, is required at the meeting/hearing.

**File No. 21151:** Complaint filed by Jerry Dratler versus Rich Hillis, Chanbory Son, and the Planning Department for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, by failing to respond to public records request in a timely and/or complete manner.

**File No. 21148:** Complaint filed by Jordan Santagata and Karl Kramer against the San Francisco Employees' Retirement System for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24,


and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.

**Documentation (evidence supporting/disputing complaint)**

For a document to be considered, it must be received at least five (5) working days before the hearing (see attached Public Complaint Procedure).

For inclusion in the agenda packet, supplemental/supporting documents must be received by **5:00 pm, December 16, 2021.**

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
Tel: 415-554-7724

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**Leger, Cheryl (BOS)**

---

**From:** RET - SFERS, Info  
**Sent:** Tuesday, December 14, 2021 5:00 PM  
**To:** SOTF, (BOS)  
**Subject:** RE: SOTF - Complaint Committee hearing, December 21, 2021; 5:30 PM; remote meeting;  
**Attachments:** SF Living Wage Coalition Information Request; SOTF Response File 21148.pdf

Good afternoon,

Thank you so much for your response. We do not have any additional evidence to submit. I have attached an additional copy of our initial response if it is needed.

Kind regards

Stephen Worsfold



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 [Like SFERS on Facebook](#)

**From:** SOTF, (BOS) <sotf@sfgov.org>  
**Sent:** Tuesday, December 14, 2021 8:42 AM  
**To:** RET - SFERS, Info <sfersinfo@sfgov.org>  
**Subject:** RE: SOTF - Complaint Committee hearing, December 21, 2021; 5:30 PM; remote meeting;

Hello: You are welcome to submit additional information that would support your case/position. If you have already submitted your response, that is fine.

Cheryl Leger  
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Fax: 415-554-5163  
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Jordan Santagata  
Intern-San Francisco Living Wage Coalition  
[Sflivingwage@riseup.net](mailto:Sflivingwage@riseup.net)



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Thanks for your help,

Stephen Worsfold

**From:** SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)>

**Sent:** Tuesday, December 7, 2021 8:59 AM

**To:** Lynch, Laura (CPC) <[laura.lynch@sfgov.org](mailto:laura.lynch@sfgov.org)>; Son, Chanbory (CPC) <[chanbory.son@sfgov.org](mailto:chanbory.son@sfgov.org)>; [dratlerj@gmail.com](mailto:dratlerj@gmail.com); San Francisco Living Wage <[sflivingwage@gmail.com](mailto:sflivingwage@gmail.com)>; Jordan Santagata <[jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu)>; RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)>

**Subject:** SOTF - Complaint Committee hearing, December 21, 2021; 5:30 PM; remote meeting;

Good Morning:

Notice is hereby given that the Complaint Committee (Committee) of the Sunshine Ordinance Task Force (Task Force) shall hold hearings on complaints listed below to: 1) determine if the Task Force has jurisdiction; 2) review the merits of the complaints; and/or 3) issue a report and/or recommendation to the Task Force.

Date: December 21, 2021

Location: Remote Meeting

Time: 5:30 p.m.

Complainants: Your attendance is required for this meeting/hearing.

Respondents/Departments: Pursuant to Section 67.21 (e) of the Ordinance, the custodian of records or a representative of your department, who can speak to the matter, is required at the meeting/hearing.

**File No. 21151:** Complaint filed by Jerry Dratler versus Rich Hillis, Chanbory Son, and the Planning Department for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, by failing to respond to public records request in a timely and/or complete manner.


**File No. 21148:** Complaint filed by Jordan Santagata and Karl Kramer against the San Francisco Employees' Retirement System for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24, and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.

**Documentation (evidence supporting/disputing complaint)**

For a document to be considered, it must be received at least five (5) working days before the hearing (see attached Public Complaint Procedure).

For inclusion in the agenda packet, supplemental/supporting documents must be received by **5:00 pm, December 16, 2021.**

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
Tel: 415-554-7724

 Click [here](#) to complete a Board of Supervisors Customer Service Satisfaction form.

The [Legislative Research Center](#) provides 24-hour access to Board of Supervisors legislation, and archived matters since August 1998.

***Disclosures:** Personal information that is provided in communications to the Board of Supervisors is subject to disclosure under the California Public Records Act and the San Francisco Sunshine Ordinance. Personal information provided will not be redacted. Members of the public are not required to provide personal identifying information when they communicate with the Board of Supervisors and its committees. All written or oral communications that members of the public submit to the Clerk's Office regarding pending legislation or hearings will be made available to all members of the public for inspection and copying. The Clerk's Office does not redact any information from these submissions. This means that personal information—including names, phone numbers, addresses and similar information that a member of the public elects to submit to the Board and its committees—may appear on the Board of Supervisors website or in other public documents that members of the public may inspect or copy.*

**Leger, Cheryl (BOS)**

---

**From:** RET - SFERS, Info  
**Sent:** Wednesday, December 22, 2021 4:48 PM  
**To:** sflivingwage@gmail.com  
**Cc:** SOTF, (BOS)  
**Subject:** RE: SOTF - Sunshine Task Force Complaint Committee Agenda, December 21, 2021

Good afternoon,

As discussed during yesterday's meeting please see below a link to the March 11, 2020 CIO report, which lists the most recent disclosure of an investment with Vesta Equity Partners.

<https://mysfers.org/wp-content/uploads/2020/03/03112020-11.pdf>

Kind regards,

SFERS

**From:** SOTF, (BOS) <sotf@sfgov.org>  
**Sent:** Friday, December 17, 2021 3:06 PM  
**To:** Claudia Ovalles <inbox.ovalles@gmail.com>; Burke, Robyn (DAT) <robyn.burke@sfgov.org>; Boudin, Chesa (DAT) <chesa@sfgov.org>; Ahimsa Porter Sumchai MD <AhimsaPorterSumchaiMD@comcast.net>; Heckel, Hank (MYR) <hank.heckel@sfgov.org>; micah.fobbs@hpscac.com; info@hpscac.com; alise@hpscac.com; Jordan Santagata <jordan.santagata@sjsu.edu>; San Francisco Living Wage <sflivingwage@gmail.com>; RET - SFERS, Info <sfersinfo@sfgov.org>; Worsfold, Stephen (RET) <stephen.worsfold@sfgov.org>; Son, Chanbory (CPC) <chanbory.son@sfgov.org>; Hillis, Rich (CPC) <rich.hillis@sfgov.org>; dratlerj@gmail.com; sfneighborhoods.net <info@sfneighborhoods.net>; Gerull, Linda (TIS) <linda.gerull@sfgov.org>; PORTER, KATHARINE (CAT) <Katharine.Porter@sfcityatty.org>; COOLBRITH, ELIZABETH (CAT) <Elizabeth.Coolbrith@sfcityatty.org>; KWART, JEN (CAT) <Jen.Kwart@sfcityatty.org>; barbaraqtaylor@gmail.com; Sergei Severinov <serolga@yahoo.com>; Maunder, Sara (DPA) <sara.maunder@sfgov.org>; Rosenstein, Diana (DPA) <diana.rosenstein@sfgov.org>  
**Cc:** Young, Victor (BOS) <victor.young@sfgov.org>  
**Subject:** SOTF - Sunshine Task Force Complaint Committee Agenda, December 21, 2021

Good Afternoon:

The agenda and packet for the of the Sunshine Ordinance Task Force Complaint Committee December 21, 2021, 5:30 p.m. meeting is online at the following link:

[https://sfgov.org/sunshine/sites/default/files/complaint\\_122121\\_agenda.pdf](https://sfgov.org/sunshine/sites/default/files/complaint_122121_agenda.pdf)

The packet material is linked to each item listed on the agenda marked with an "attachment". Click anywhere on the title of the item to open the link to the pdf of the packet material in question.

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)  
Tel: 415-554-7724  
Fax: 415-554-5163





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# SFERS

San Francisco Employees' Retirement System

City and County of San Francisco  
Employees' Retirement System

## RETIREMENT BOARD CALENDAR SHEET

### Retirement Board Meeting of March 11, 2020

**To:** Retirement Board

**Through:** Jay Huish   
Executive Director

William J. Coaker, Jr. – CFA, MBA   
Chief Investment Officer

**From:** Tiffany Dong   
Investment Analyst

**Date:** March 11, 2020

**Re:** Chief Investment Officer's Report – Plan Value

Best available data as of February 29, 2020

	<u>Value<sup>1</sup></u> (000)	<u>Weight</u> (%)	<u>MTD</u> (%)	<u>QTD</u> (%)	<u>YTD</u> (%)	<u>FYTD</u> (%)
<b>SFERS TOTAL FUND</b>	<b>26,602,443</b>	<b>100.0</b>	<b>-1.94</b>	<b>-2.19</b>	<b>-2.19</b>	<b>3.01</b>
Public Equity	9,025,586	33.9	-6.40	-6.96	-6.96	0.88
Private Equity	5,444,275	20.5	1.14	0.58	0.58	6.78
<b>GROWTH ASSETS</b>	<b>14,469,861</b>	<b>54.4</b>				
Real Assets	4,118,735	15.5	0.31	0.02	0.02	2.49
Absolute Return <sup>2</sup>	3,802,140	14.3	0.00	-0.11	-0.11	2.61
<b>DIVERSIFYING ASSETS</b>	<b>7,920,874</b>	<b>29.8</b>				
Private Credit	1,068,926	4.0	0.55	0.92	0.92	4.99
Fixed Income	2,362,715	8.9	0.96	2.31	2.31	4.51
<b>INCOME GENERATING ASSETS</b>	<b>3,431,641</b>	<b>12.9</b>				
Cash ex Overlay	349,414	1.3	---	---	---	---
Cash Overlay <sup>3</sup>	430,653	1.6	---	---	---	---

<sup>1</sup> Valuations are preliminary and are reported gross of fees. The reported returns are based on prior month-end values that have been audited and adjusted by SFERS' Custody Bank since the last report. For non-daily priced vehicles, performance may include estimates or be proxied using benchmark performance.

<sup>2</sup> Absolute Return performance for most recent month not available and assumed to be 0.0%.

<sup>3</sup> Cash Overlay performance is reflected in Total Fund Performance.



# SFERS - Asset Allocation Summary Report |

As of February 29, 2020

	1/31/2020	Cash In	Cash Out	MV Δ <sup>1</sup>	2/29/2020	Current	LT Target	Range	4/30/2020 Projection			Unfunded
		(\$ Mn)				Weight (%)			Expected Δ <sup>2</sup>	End \$	End %	(\$ Mn)
<b>GROWTH ASSETS</b>	<b>14,948.2</b>	<b>502.2</b>	<b>430.4</b>	<b>-550.1</b>	<b>14,469.9</b>	<b>54.4</b>	<b>49</b>	<b>40 - 60</b>	<b>-316.8</b>	<b>14,153.1</b>	<b>53.6</b>	<b>3,471.9</b>
Public Equity	9,550.5	424.6	338.1	-611.5	9,025.6	33.9	31	25 - 50	-341.4	8,684.1	32.9	
United States	4,275.9	400.0	314.4	-285.6	4,076.0	15.3						
Developed Ex-US	1,223.5	24.5	23.6	-100.4	1,124.1	4.2						
Emerging	1,639.5	0.0	0.0	-66.9	1,572.6	5.9						
Global	2,411.6	0.0	0.1	-158.6	2,252.9	8.5						
Private Equity	5,397.7	77.6	92.4	61.4	5,444.3	20.5	18	13 - 23	24.7	5,468.9	20.7	3,471.9 <sup>3</sup>
<b>DIVERSIFYING ASSETS</b>	<b>7,942.4</b>	<b>67.7</b>	<b>102.0</b>	<b>12.7</b>	<b>7,920.9</b>	<b>29.8</b>	<b>32</b>	<b>19 - 37</b>	<b>90.9</b>	<b>8,011.8</b>	<b>30.3</b>	<b>2,731.1</b>
Real Assets	4,071.5	61.7	27.0	12.5	4,118.7	15.5	17	12 - 22	20.9	4,139.7	15.7	2,473.4 <sup>3</sup>
Absolute Return	3,870.9	6.0	75.0	0.2	3,802.1	14.3	15	5 - 17	70.0	3,872.1	14.7	257.7
<b>INCOME ASSETS</b>	<b>2,169.2</b>	<b>16.0</b>	<b>14.1</b>	<b>8.2</b>	<b>2,179.2</b>	<b>8.2</b>	<b>13</b>	<b>5 - 25</b>	<b>16.1</b>	<b>2,195.3</b>	<b>8.3</b>	<b>1,291.6</b>
Liquid Credit	1,108.3	0.0	0.3	2.3	1,110.3	4.2	3	0 - 10	0.0	1,110.3	4.2	
Private Credit	1,060.9	16.0	13.8	5.9	1,068.9	4.0	10	3 - 15	16.1	1,085.0	4.1	1,291.6 <sup>3</sup>
<b>CAPITAL PRESERVATION</b>	<b>2,175.6</b>	<b>650.6</b>	<b>794.0</b>	<b>0.3</b>	<b>2,032.5</b>	<b>7.6</b>	<b>6</b>	<b>3 - 15</b>	<b>9.8</b>	<b>2,042.3</b>	<b>7.7</b>	<b>0.0</b>
Treasuries	1,232.2	0.1	0.0	20.2	1,252.4	4.7	6	3 - 10	0.0	1,252.4	4.7	
Cash	943.5	650.5	794.0	-19.9	780.1	2.9	0	0 - 5	9.8	789.9	3.0	
Investment Cash	356.9	546.5	690.0	34.4	247.8	0.9			9.8	257.6	1.0	
Dedicated Cash	101.5	104.0	104.0	0.1	101.6	0.4			0.0	101.6	0.4	
Secondary Receivables	380.4	0.0	0.0	0.0	380.4	1.4			0.0	380.4	1.4	
Cash Overlay	104.7	0.0	0.0	-54.5	50.2	0.2			0.0	50.2	0.2	
<b>TOTAL PORTFOLIO</b>	<b>27,235.4</b>	<b>0.0</b>	<b>104.0</b>	<b>-528.9</b>	<b>26,602.4</b>	<b>100.0</b>	<b>100</b>		<b>-200.0</b>	<b>26,402.4</b>	<b>100.0</b>	<b>7,494.5</b>

Notes: Target allocations and ranges were approved by the Board in September 2017 and October 2017, respectively. Beginning and Ending Asset Balances are based on 'Entry Dates'.

<sup>1</sup> For non-daily priced vehicles, performance may include estimates or be proxied using benchmark performance.

<sup>2</sup> Expected Changes include Staff's planned rebalancing activity (for Liquid and Semi-Liquid asset classes) and capital call and distribution projections provided by Torrey Cove (for Illiquid asset classes).

<sup>3</sup> Unfunded commitment estimates for private markets are provided by Torrey Cove as of the current month end.

**San Francisco City and County Employees' Retirement System**  
**Cash Activities and Projections**  
**As of February 29, 2020**

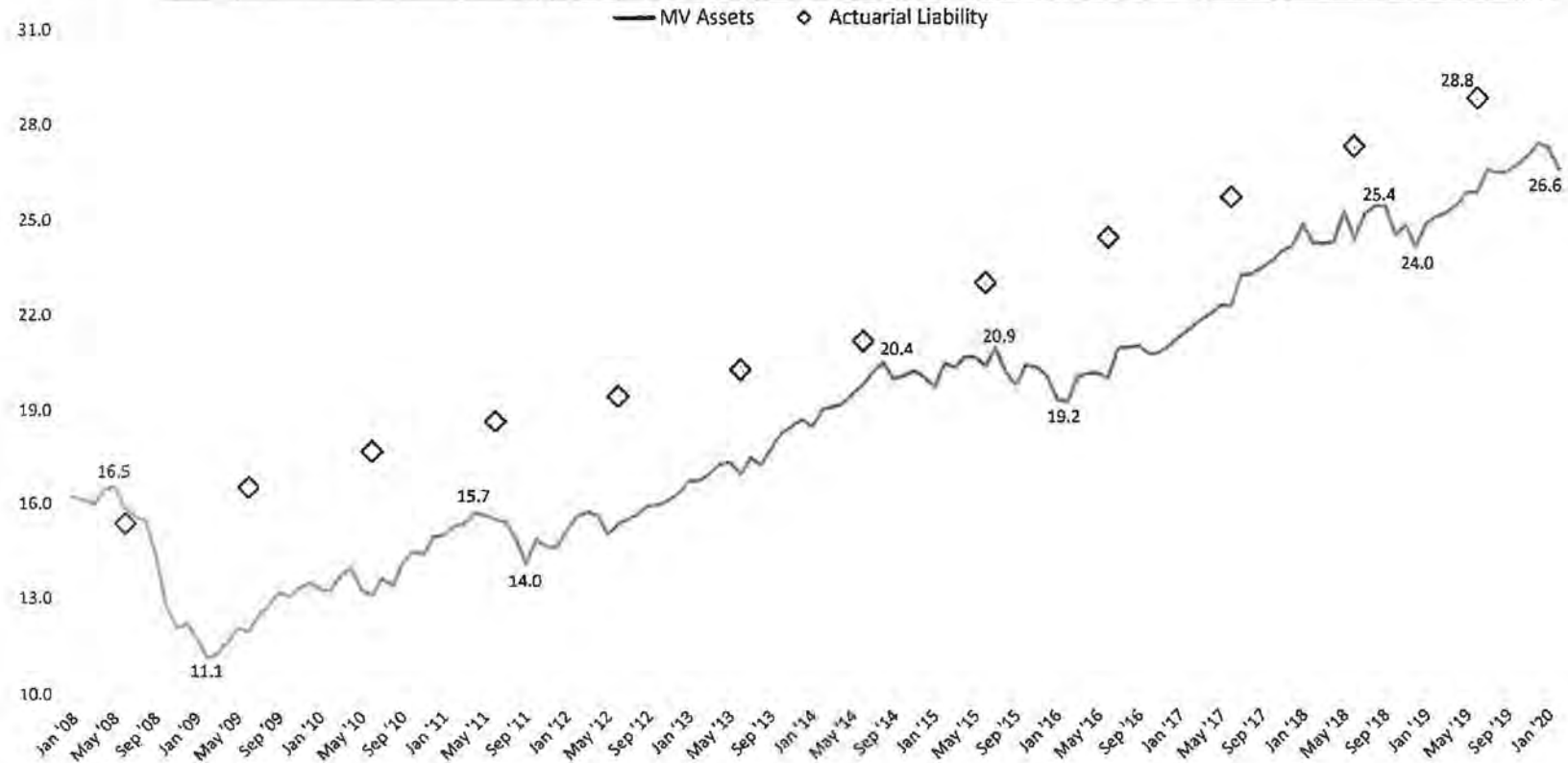
<b>Investment Cash Account (In \$ Million)</b>	
<b>Beginning Balance as of February 1, 2020</b>	<b>356.9</b>
Public Equity Net Flows	-86.6
Private Equity Net Flows	14.8
Real Assets Net Flows	-34.8
Absolute Return Net Flows	69.0
Liquid Credit Net Flows	0.3
Private Credit Net Flows	-2.2
Treasuries Net Flows	-0.1
Funds to Dedicated Cash	-104.0
Funds to Cash Overlay	0.0
Misc. Cash Receipts	34.4
<b>Ending Balance as of February 29, 2020</b>	<b>247.8</b>
<b>2 Month Forward Projections</b>	
Public Equity Estimated Flows	341.4
Private Equity Estimated Flows	-24.7
Real Assets Estimated Flows	-20.9
Absolute Return Estimated Flows	-70.0
Liquid Credit Estimated Flows	0.0
Private Credit Estimated Flows	-16.1
Treasuries Estimated Flows	0.0
Transfer to Dedicated Cash	-200.0
<b>Projected Ending Balance as of April 30, 2020</b>	<b>257.6</b>

<b>Dedicated Cash Account (In \$ Million)</b>	
<b>Beginning Balance as of February 1, 2020</b>	<b>101.5</b>
Benefit Payment for February 2020	-104.0
Received from Investment Cash	104.0
Misc. Cash Receipts	0.1
<b>Ending Balance as of February 29, 2020</b>	<b>101.6</b>
<b>2 Month Forward Projections</b>	
Benefit Payment Reserve for March 2020 and April 2020	-200.0
Received from Investment Cash	200.0
<b>Projected Ending Balance as of April 30, 2020</b>	<b>101.6</b>

Note: Positive sign denotes an inflow into the cash account and a negative sign denotes an outflow from the cash account.

# SFERS - Monthly Assets

1201



Notes: Data from January 31, 2008 through February 29, 2020. Total Plan market values through December 2019 are provided by NEPC. Data starting January 2020 is provided by BNY Mellon and should be considered preliminary.



# SFERS

San Francisco Employees' Retirement System


## San Francisco City and County Employees' Retirement System Chief Investment Officer


William J. Coaker Jr., CFA, MBA

### RETIREMENT BOARD CALENDAR SHEET Retirement Board Meeting of February 12, 2020

**DATE:** March 11, 2020

**TO:** Members of the Retirement Board

**THROUGH:** Jay Huish   
Executive Director

**FROM:** William J. Coaker Jr. – CFA, CFP, MBA   
Chief Investment Officer

**SUBJECT:** CIO Report

---

#### 1 – Investment Returns

##### February 2020:

In February 2020 SFERS portfolio lost -1.94% while the S&P 500 and the MSCI ACWI fell by -8.41% and -8.21%, respectively. The broad equity markets sold off sharply during the month due to concerns over the rapid growth of the coronavirus and its potential effects on economic growth.

Our returns this month were helped by both asset allocation and manager selection. In asset allocation, SFERS has an actual weight to Public Equity of 34% (target weight of 31%), so most of our portfolio was not exposed to the selloff. Further, our Private Equity, Fixed Income, Private Credit and Real Assets portfolios posted gains in February, ranging from 0.31% to 1.14%. Manager selection also helped during the month, particularly in our Public Equity portfolio which lost -6.40% while the MSCI ACWI declined by -8.21%.

##### Fiscal Year-to-Date:

With eight months of FY2020-21 in the books, SFERS has posted a return of 3.01%. Public Equity has been laggard, recording a gain of just 0.88%. All our other asset classes have generated returns ranging from 2.49% (Real Assets) to 6.78% (Private Equity).

## 2 – February 2020 Selloff

### What Happened:

As noted above, this past month the S&P 500 lost -8.41% while the MSCI ACWI fell -8.21%. The sharp decline was due to the rapid growth of the coronavirus, with the number of confirmed infections increasing from about 300 on January 20 and less than 10,000 on January 31 to 89,000 on February 29. Additionally, the number of fatalities soared to 3,044 by February 29. Comparatively, in 2003 the number of people infected with the SARS virus was 8,098 and the number of fatalities was 774.

Beyond the fast-rising number of people infected with the coronavirus, forecasts were trending that the virus would experience a "boom" in new cases. Bill Gates compared the coronavirus to the flu season of 1957 in which more than one million people perished and the 1918 flu pandemic in which an estimated 50 million people lost their lives. Gates estimated that the current coronavirus would be somewhere in between. Health care experts and public health officials also stated they expected the number of confirmed cases would rise dramatically in the next week or so as existing cases are identified.

The virus originated in China and to date approximately 2,800 of the 3,044 fatalities have occurred in China. However, the number of infections has risen quickly, with 60 countries reporting confirmed cases. One piece of hopeful news is that the growth in the number of cases in China has recently begun to slow. Most of the fatalities have been the elderly and people with significant conditions such as heart diseases and other chronic illnesses. Health people and the young have been much less impacted by the virus.

In February investors worried that the number of infected and the number of fatalities would continue to soar, and that it would significantly impact global economic growth. A CNBC survey of forecasters estimated that U.S. GDP would grow by just 1.2% in the first quarter, the OECD warned of recession in Europe and Japan due to the virus, and China's economy has either slowed dramatically or contracted.

The outbreak of the coronavirus brings to mind a report last year by the World Health Organization and the World Bank that there was "a very real threat of a rapidly moving, highly lethal pandemic of a respiratory pathogen killing 50 to 80 million people and wiping out nearly 5% of the world's economy. In the past two decades we have experienced SARS, the avian flu, the Ebola virus, and the coronavirus in relatively close succession.

### SFERS Action:

When fear grips investors and asset value plunge suddenly, it's worth remembering that SFERS has planned and prepared beforehand for sharp selloffs.

In asset allocation, SFERS has meaningfully reduced our exposure to market risk by reducing our exposure to long-only public equity. In manager selection, we have emphasized managers with unique and niche strategies and specialist skill. We also have extra emphasis on sectors such as technology and health care that are secular growth stories and less dependent on economic direction. In other words, SFERS has planned. We have prepared, for unexpected economic developments and sharp declines in equity prices.

In the short-term, if the spread of the coronavirus worsens more than consensus has come to fear, the markets are likely to continue their decline. If officials gain control of the growth of the disease, or if a vaccine is discovered (seven companies are rapidly testing for a vaccine) then the markets will likely quickly recover. In the short-term, the market direction is unknowable.



However, over the long-term, markets have almost always moved higher. The following is a summary of short and long term returns:

**1-Year Returns:**

- Only about 70% of 1-year returns have historically been positive
- Stocks have been about three times as likely to make money in one year as lose money.
- Six times the S&P 500 has lost 25% or more in a calendar year

**20-Year Returns:**

- 100% of annualized 20-year returns have been positive.
- The lowest annualized 20-year return in the S&P 500 has been 3.1%.
- 90% of annualized 20-year returns have been 7.0% or greater.

While we are long-term investors, we are mindful of the damage a large one-year loss would have on our funded status. For example, a 20% loss on our investment in one plus cash outflows for benefits and rising liabilities would result in a punishing 27% decline in our funded status. Hence, our dual objective is to reduce the impact caused by a large market decline while simultaneously earning high long returns.

### **3 - Altimeter Partners Fund, L.P.**

At its meeting on February 12, 2020, the Retirement Board approved in closed session an investment of up to \$200 million in Altimeter Partners Fund, L.P. The investment was approved by the following vote:

Ayes: Commissioners Bridges, Casciato, Chu, Driscoll, Heldfond, Safai, Stansbury

SFERS' investment of \$150 million closed on March 1, 2020. SFERS expects to commit another \$50 million when additional capacity becomes available. The investment is classified as an opportunistic investment within SFERS' public equity portfolio and is SFERS' first investment with Altimeter Capital Management.

More information about Altimeter is available at <https://www.altimeter.com/>.

### **4 - Carlyle Aviation Partners SASOF V, L.P.**

At its meeting on February 12, 2020, the Retirement Board approved in closed session an investment of up to \$50 million in Carlyle Aviation Partners SASOF V, L.P. The investment was approved by the following vote:

Ayes: Commissioners Bridges, Casciato, Chu, Driscoll, Heldfond, Safai, Stansbury

Nays: None

SFERS investment of \$50 million in Carlyle Aviation Partners SASOF V, L.P. closed on February 14, 2020. This investment will be classified as a specialty finance investment within the SFERS' Private Credit Portfolio.

More information about Carlyle Aviation Partners is available at [carlyle.aero](http://carlyle.aero).

## **5 - Presidio Loan Fund, L.P**

At its meeting on November 13, 2019, the Retirement Board approved in closed session a fund-of-one investment of up to \$275 million with HPS in Presidio Loan Fund, L.P. The investment was approved by the following vote:

Ayes: Commissioners Bridges, Chu, Driscoll, Casciato, Safai, Stansbury

Absent: Commissioner Heldfond

SFERS' investment of \$275 million closed on February 25, 2020. This investment will be classified as a global senior debt fund within SFERS' Private Credit Portfolio.

More information about HPS Investment Partners, LLC is available at [www.hpspartners.com](http://www.hpspartners.com).

## **6 - SASOF V LP**

At its meeting on February 12, 2020, the Retirement Board approved in closed session an investment of up to \$50 million in Carlyle Aviation Partners SASOF V, L.P. The investment was approved by the following vote:

Ayes: Commissioners Bridges, Casciato, Chu, Driscoll, Heldfond, Safai, Stansbury

Nays: None

SFERS investment of \$50 million in Carlyle Aviation Partners SASOF V, L.P. closed on September 14, 2020. This investment will be classified as a specialty finance investment within the SFERS' Private Credit Portfolio.

More information about Carlyle Aviation Partners is available at [carlyle.aero](http://carlyle.aero).

## **7 - Vista Foundation Fund IV, L.P.**

At its meeting on January 8, 2020, the Retirement Board approved in closed session an investment of up to \$50 million in Vista Foundation Fund IV, L.P. The investment was approved by the following vote:

Ayes: Commissioners Bridges, Casciato, Driscoll, Heldfond

Absent: Commissioners Chu, Safai, Stansbury

SFERS' investment of \$50 million in Vista Foundation Fund IV, L.P. closed on February 21, 2020.

This investment is classified as a Medium Buyout fund within SFERS' private equity portfolio and is SFERS' eighth investment with Vista Equity Partners.

More information about Vista Equity Partners is available on <https://www.vistaequitypartners.com>



## 8 - Whale Rock Long Opportunities Fund LP

At its meeting on February 12, 2020, the Retirement Board approved in closed session an investment of up to \$300 million in Whale Rock Long Opportunities Fund LP. The investment was approved by the following vote:

Ayes: Commissioners Bridges, Casciato, Chu, Driscoll, Heldfond, Safai, Stansbury

SFERS' investment of \$200 million closed on March 1, 2020. SFERS expects to commit another \$100 million on April 1, 2020. The investment is classified as an opportunistic investment within SFERS' public equity portfolio and is SFERS' first investment with Whale Rock Capital Management.

More information about Whale Rock is available at <https://www.whalerockcapital.com/>.

## 9 – Personnel

Ms. Irene Zhao joined SFERS last month as an Investment Analyst, assisting Justin Lo on our Venture Capital portfolio. Ms. Zhao has one year experience, principally at CalPERS as an Intern. She has four degrees, including the following: Bachelor of Business Administration from Wuhan University of Science and Technology in China; Bachelor of Business in Economics and Finance from the Royal Melbourne Institute of Technology in Australia; Master of Business Analytics specializing in Data Science and Optimization from the University of Melbourne in Australia; and a Master of Financial Engineering from the University of California, Berkeley, Haas School of Business.

The recruitment for our inaugural Manager of Investment Operations is underway as is our search for an Investment Analyst for Public Equity. We plan to begin recruitment for a Senior Portfolio Manager of Private Equity soon.

## 10 – SFERS Plan and Asset Class Updates

### Strategy Updates:

Staff plans to bring the following Strategy updates the Board as follows:

- |                  |  |
|------------------|--|
| - January 2020   | Public Equity and Fixed Income and SFERS Strategic Plan (complete) |
| - April 2020     | Absolute Return  |
| - July 2020      | Private Equity, Real Assets, and Private Credit                    |
| - September 2020 | Asset Allocation, Risk Management, and for the Total SFERS Trust   |
| - October 2020   | ESG  |

**From:** SOTF, (BOS)  
**To:** RET - SFERS, Info  
**Cc:** San Francisco Living Wage; Jordan Santagata  
**Subject:** SOTF - Complaint Filed with the Sunshine Ordinance Task Force - File No. 21148  
**Attachments:** SOTF - Complaint Procedure 2019-10-02 FINAL.pdf; Preparing SOTF Respondent Materials FINAL for PILOT.pdf; 21148 complaint.pdf

Good Afternoon:

The San Francisco Employees Retirement System has been named as a Respondent in the attached complaint filed with the Sunshine Ordinance Task Force (SOTF). In an effort to provide the SOTF information in an easy to understand format the SOTF has prepared a revised request format for responding to complaints (attached). The SOTF encourages you to use the attached "Respondent – Requested Information and Format" in preparing your response to the attached complaint. Your input into the requested information would be appreciated as the SOTF evaluates the request response format to streamline the complaint process. **The SOTF is requesting that you submit your response to the allegations including any and all supporting documents, recordings, electronic media, etc., to the Task Force within five (5) business days of receipt of this notice.** In developing and submitting your response, please use the attached instructions, "Preparing San Francisco Sunshine Ordinance Task Force Respondents Materials," to address your defense of this complaint. This is your opportunity to provide a detailed explanation to allow the Task Force to be fully informed in considering your response prior to the meeting.

Please include the following information in your response if applicable:

1. List all relevant records with descriptions that have been provided pursuant to the Complainant request.
2. Date the relevant records were provided to the Complainant.
3. Description of the method used, along with any relevant search terms used, to search for the relevant records.
4. Statement/declaration that all relevant documents have been provided, does not exist, or has been excluded.
5. Copy of the original request for records (if applicable).
6. Statement/declaration that all relevant documents have been provided, does not exist, or Acknowledgement of noncompliance with the Sunshine Ordinance or declaration of no-contest.

Please refer to the File Number when submitting any new information and/or supporting documents pertaining to this complaint.

The Complainant alleges:  
*Complaint Attached.*

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
Tel: 415-554-7724



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**Leger, Cheryl (BOS)**

---

**From:** SOTF, (BOS)  
**Sent:** Tuesday, December 7, 2021 8:59 AM  
**To:** Lynch, Laura (CPC); Son, Chanbory (CPC); 'dratlerj@gmail.com'; 'San Francisco Living Wage'; 'Jordan Santagata'; RET - SFERS, Info  
**Subject:** SOTF - Complaint Committee hearing, December 21, 2021; 5:30 PM; remote meeting;  
**Attachments:** SOTF - Complaint Procedure 2019-10-02 FINAL.pdf

Good Morning:

Notice is hereby given that the Complaint Committee (Committee) of the Sunshine Ordinance Task Force (Task Force) shall hold hearings on complaints listed below to: 1) determine if the Task Force has jurisdiction; 2) review the merits of the complaints; and/or 3) issue a report and/or recommendation to the Task Force.

Date: December 21, 2021

Location: Remote Meeting

Time: 5:30 p.m.

Complainants: Your attendance is required for this meeting/hearing.

Respondents/Departments: Pursuant to Section 67.21 (e) of the Ordinance, the custodian of records or a representative of your department, who can speak to the matter, is required at the meeting/hearing.

**File No. 21151:** Complaint filed by Jerry Dratler versus Rich Hillis, Chanbory Son, and the Planning Department for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, by failing to respond to public records request in a timely and/or complete manner.

**File No. 21148:** Complaint filed by Jordan Santagata and Karl Kramer against the San Francisco Employees' Retirement System for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24, and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.

**Documentation (evidence supporting/disputing complaint)**

For a document to be considered, it must be received at least five (5) working days before the hearing (see attached Public Complaint Procedure).

For inclusion in the agenda packet, supplemental/supporting documents must be received by **5:00 pm, December 16, 2021.**

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
Tel: 415-554-7724

**Leger, Cheryl (BOS)**

---

**From:** San Francisco Living Wage <sflivingwage@gmail.com>  
**Sent:** Wednesday, December 22, 2021 7:16 PM  
**To:** RET - SFERS, Info  
**Cc:** SOTF, (BOS)  
**Subject:** Re: SOTF - Sunshine Task Force Complaint Committee Agenda, December 21, 2021

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Received. Thank you.

On Wed, Dec 22, 2021 at 4:48 PM RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)> wrote:

Good afternoon,

As discussed during yesterday's meeting please see below a link to the March 11, 2020 CIO report, which lists the most recent disclosure of an investment with Vesta Equity Partners.

<https://mysfers.org/wp-content/uploads/2020/03/03112020-11.pdf>

Kind regards,

SFERS

---

**From:** SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)>  
**Sent:** Friday, December 17, 2021 3:06 PM  
**To:** Claudia Ovalles <[inbox.ovalles@gmail.com](mailto:inbox.ovalles@gmail.com)>; Burke, Robyn (DAT) <[robyn.burke@sfgov.org](mailto:robyn.burke@sfgov.org)>; Boudin, Chesa (DAT) <[chesa@sfgov.org](mailto:chesa@sfgov.org)>; Ahimsa Porter Sumchai MD <[AhimsaPorterSumchaiMD@comcast.net](mailto:AhimsaPorterSumchaiMD@comcast.net)>; Heckel, Hank (MYR) <[hank.heckel@sfgov.org](mailto:hank.heckel@sfgov.org)>; micah.fobbs@hpscac.com; [info@hpscac.com](mailto:info@hpscac.com); [alise@hpscac.com](mailto:alise@hpscac.com); Jordan Santagata <[jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu)>; San Francisco Living Wage <[sflivingwage@gmail.com](mailto:sflivingwage@gmail.com)>; RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)>; Worsfold, Stephen (RET) <[stephen.worsfold@sfgov.org](mailto:stephen.worsfold@sfgov.org)>; Son, Chanbory (CPC) <[chanbory.son@sfgov.org](mailto:chanbory.son@sfgov.org)>; Hillis, Rich (CPC) <[rich.hillis@sfgov.org](mailto:rich.hillis@sfgov.org)>; [dratlerj@gmail.com](mailto:dratlerj@gmail.com); [sfneighborhoods.net](mailto:info@sfneighborhoods.net) <[info@sfneighborhoods.net](mailto:info@sfneighborhoods.net)>; Gerull, Linda (TIS) <[linda.gerull@sfgov.org](mailto:linda.gerull@sfgov.org)>; PORTER, KATHARINE (CAT) <[Katharine.Porter@sfcityatty.org](mailto:Katharine.Porter@sfcityatty.org)>; COOLBRITH, ELIZABETH (CAT) <[Elizabeth.Coolbrith@sfcityatty.org](mailto:Elizabeth.Coolbrith@sfcityatty.org)>; KWART, JEN (CAT) <[Jen.Kwart@sfcityatty.org](mailto:Jen.Kwart@sfcityatty.org)>; [barbaragtaylor@gmail.com](mailto:barbaragtaylor@gmail.com); Sergei Severinov <[serolga@yahoo.com](mailto:serolga@yahoo.com)>; Maunder, Sara (DPA) <[sara.maunder@sfgov.org](mailto:sara.maunder@sfgov.org)>; Rosenstein, Diana (DPA) <[diana.rosenstein@sfgov.org](mailto:diana.rosenstein@sfgov.org)>

Cc: Young, Victor (BOS) <[victor.young@sfgov.org](mailto:victor.young@sfgov.org)>

Subject: SOTF - Sunshine Task Force Complaint Committee Agenda, December 21, 2021

Good Afternoon:

The agenda and packet for the of the Sunshine Ordinance Task Force Complaint Committee December 21, 2021, 5:30 p.m. meeting is online at the following link:

[https://sfgov.org/sunshine/sites/default/files/complaint\\_122121\\_agenda.pdf](https://sfgov.org/sunshine/sites/default/files/complaint_122121_agenda.pdf)

The packet material is linked to each item listed on the agenda marked with an "attachment". Click anywhere on the title of the item to open the link to the pdf of the packet material in question.

Cheryl Leger

Assistant Clerk, Board of Supervisors

[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)

Tel: 415-554-7724

Fax: 415-554-5163

[www.sfbos.org](http://www.sfbos.org)



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**From:** SOTF, (BOS)  
**Sent:** Wednesday, May 18, 2022 11:53 AM  
**To:** Burke, Robyn (DAT); Claudia Ovalles; San Francisco Living Wage; Jordan Santagata; Ionin, Jonas (CPC); dratlerj@gmail.com; Library Users Association; Lambert, Michael (LIB); Shaub, Margot (LIB); Tran, Sophie (DPH); Marc Norton  
**Cc:** Young, Victor (BOS)  
**Subject:** SOTF - Notice of Appearance, June 1, 2022 - Sunshine Ordinance Task Force; 4:00 PM; Remote Meeting  
**Attachments:** SOTF - Complaint Procedure 2019-10-02 FINAL.pdf

Good Morning:

You are receiving this notice because you are named as a Complainant or Respondent in the following complaints scheduled before the Sunshine Ordinance Task Force to: 1) hear the merits of the complaint; 2) issue a determination; and/or 3) consider referrals from a Task Force Committee. ***Please confirm your attendance with the Sunshine Task Force Administrator for this hearing.***

Date: June 1, 2022

Location: Remote Meeting

Time: 4:00 p.m.

Complainants: Your attendance is required for this meeting/hearing.

Respondents/Departments: Pursuant to Section 67.21 (e) of the Ordinance, the custodian of records or a representative of your department, who can speak to the matter, is required at the meeting/hearing.

Complaints:

**File No. 21141:** Complaint filed by Claudia Ovalles against the Office of the District Attorney for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, by failing to respond to a request for public records in a timely and/or complete manner,

**File No. 21148:** Complaint filed by Jordan Santagata and Karl Kramer against the San Francisco Employees' Retirement System for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24, and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.


**File No. 21151:** Complaint filed by Jerry Dratler versus Rich Hillis, Charnbory Son, and the Planning Department for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, by failing to respond to public records request in a timely and/or complete manner.

**File No. 21165:** Complaint filed by Peter Warfield, Library Users Association against City Librarian Michael Lambert and the Public Library for allegedly violating Administrative Code (Sunshine Ordinance), Sections 67.21, by failing to respond to a public records request in a timely and/or complete manner.

**File No. 22005:** Complaint filed by Marc Norton Against the Department of Public Health for allegedly violating Administrator Code (Sunshine Ordinance), Sections 67.21, by failing to respond to a public records request in a timely and/or complete manner.

For inclusion in the agenda packet, supplemental/supporting documents must be received by **5:00 pm, May 26, 2022.**

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
Tel: 415-554-7724

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**Leger, Cheryl (BOS)**

---

**From:** Leger, Cheryl (BOS)  
**Sent:** Thursday, June 2, 2022 11:19 AM  
**To:** San Francisco Living Wage; Jordan Santagata  
**Cc:** Young, Victor (BOS)  
**Subject:** SOTF - Notice of case closure at June 1, 2022 Sunshine Task Force hearing

Dear Karl Kramer and Jordan Santagata: The Sunshine Ordinance Task Force scheduled your complaint, listed below, for a hearing on June 1, 2022, and due to your failure to appear the Task Force tabled your complaint and considers the matter concluded. If you believe that your complaint has been tabled in error please inform the SOTF Administrator with 60 days for instructions regarding possible reconsideration.

**File No. 21148:** Complaint filed by Jordan Santagata and Karl Kramer against the San Francisco Employees' Retirement System for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24, and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.

The Petitioner was not present for the hearing and did not notify the Administrator of their absence.

A representative of the San Francisco Employees Retirement System (Respondent) was present for the hearing.

**Action: Moved by Vice-Chair Wong, seconded by Member Stein to close the matter per Sunshine Ordinance Task Force Complaint Procedures Section 7B.**

Public Comment:

None.

**The motion PASSED by the following vote:**

Ayes: 10 - Wong, Stein, Schmidt, LaHood, Padmanabhan, Hyland, Neighbors, Hill, Wolfe, Yankee

Noes: 0 - None

Please let me know if you have questions. Thank you.

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)  
Tel: 415-554-7724  
Fax: 415-554-5163  
[www.sfbos.org](http://www.sfbos.org)



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**From:** Leger, Cheryl (BOS)  
**Sent:** Thursday, June 2, 2022 11:19 AM  
**To:** San Francisco Living Wage; Jordan Santagata  
**Cc:** Young, Victor (BOS)  
**Subject:** SOTF - Notice of case closure at June 1, 2022 Sunshine Task Force hearing

Dear Karl Kramer and Jordan Santagata: The Sunshine Ordinance Task Force scheduled your complaint, listed below, for a hearing on June 1, 2022, and due to your failure to appear the Task Force tabled your complaint and considers the matter concluded. If you believe that your complaint has been tabled in error please inform the SOTF Administrator with 60 days for instructions regarding possible reconsideration.

**File No. 21148:** Complaint filed by Jordan Santagata and Karl Kramer against the San Francisco Employees' Retirement System for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24, and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.

The Petitioner was not present for the hearing and did not notify the Administrator of their absence.

A representative of the San Francisco Employees Retirement System (Respondent) was present for the hearing.

**Action: Moved by Vice-Chair Wong, seconded by Member Stein to close the matter per Sunshine Ordinance Task Force Complaint Procedures Section 7B.**

Public Comment:

None.

**The motion PASSED by the following vote:**

Ayes: 10 - Wong, Stein, Schmidt, LaHood, Padmanabhan, Hyland, Neighbors, Hill, Wolfe, Yankee

Noes: 0 - None

Please let me know if you have questions. Thank you.

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)  
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**Leger, Cheryl (BOS)**

---

**From:** Leger, Cheryl (BOS)  
**Sent:** Friday, June 3, 2022 11:24 AM  
**To:** San Francisco Living Wage  
**Cc:** myankee.sotf@gmail.com; jenn.sotf@gmail.com  
**Subject:** RE: SOTF - Notice of case closure at June 1, 2022 Sunshine Task Force hearing

Mr. Kramer: Thank you for your response. We will keep File No. 21148 open as requested.

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)  
Tel: 415-554-7724  
Fax: 415-554-5163  
[www.sfbos.org](http://www.sfbos.org)



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**From:** San Francisco Living Wage <[sflivingwage@gmail.com](mailto:sflivingwage@gmail.com)>  
**Sent:** Friday, June 3, 2022 11:18 AM  
**To:** Leger, Cheryl (BOS) <[cheryl.leger@sfgov.org](mailto:cheryl.leger@sfgov.org)>  
**Subject:** Re: SOTF - Notice of case closure at June 1, 2022 Sunshine Task Force hearing

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Hi Cheryl,

There was confusion on my part. When I saw the email that our items were being pulled off the agenda, I thought it was all of our items and did not check to see the remaining item. I apologize because I had confirmed earlier that I would be attending. We aren't challenging the closure of the case.

Regards,  
Karl Kramer

On Thu, Jun 2, 2022 at 11:19 AM Leger, Cheryl (BOS) <[cheryl.leger@sfgov.org](mailto:cheryl.leger@sfgov.org)> wrote:

Dear Karl Kramer and Jordan Santagata: The Sunshine Ordinance Task Force scheduled your complaint, listed below, for a hearing on June 1, 2022, and due to your failure to appear the Task Force tabled your complaint and considers the matter concluded. If you believe that your complaint has been tabled in error please inform the SOTF Administrator with 60 days for instructions regarding possible reconsideration.

**File No. 21148:** Complaint filed by Jordan Santagata and Karl Kramer against the San Francisco Employees' Retirement System for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24, and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.

The Petitioner was not present for the hearing and did not notify the Administrator of their absence.

A representative of the San Francisco Employees Retirement System (Respondent) was present for the hearing.

**Action: Moved by Vice-Chair Wong, seconded by Member Stein to close the matter per Sunshine Ordinance Task Force Complaint Procedures Section 7B.**

Public Comment:

None.

**The motion PASSED by the following vote:**

Ayes: 10 - Wong, Stein, Schmidt, LaHood, Padmanabhan, Hyland, Neighbors, Hill, Wolfe, Yankee

Noes: 0 - None

Please let me know if you have questions. Thank you.

**Leger, Cheryl (BOS)**

---

**From:** Leger, Cheryl (BOS)  
**Sent:** Friday, June 3, 2022 11:24 AM  
**To:** San Francisco Living Wage  
**Cc:** myankee.sotf@gmail.com; jenn.sotf@gmail.com  
**Subject:** RE: SOTF - Notice of case closure at June 1, 2022 Sunshine Task Force hearing

Mr. Kramer: Thank you for your response. We will keep File No. 21148 open as requested.

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)  
Tel: 415-554-7724  
Fax: 415-554-5163  
[www.sfbos.org](http://www.sfbos.org)

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**From:** San Francisco Living Wage <[sflivingwage@gmail.com](mailto:sflivingwage@gmail.com)>  
**Sent:** Friday, June 3, 2022 11:18 AM  
**To:** Leger, Cheryl (BOS) <[cheryl.leger@sfgov.org](mailto:cheryl.leger@sfgov.org)>  
**Subject:** Re: SOTF - Notice of case closure at June 1, 2022 Sunshine Task Force hearing

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Hi Cheryl,

There was confusion on my part. When I saw the email that our items were being pulled off the agenda, I thought it was all of our items and did not check to see the remaining item. I apologize because I had confirmed earlier that I would be attending. We aren't challenging the closure of the case.

Regards,  
Karl Kramer

On Thu, Jun 2, 2022 at 11:19 AM Leger, Cheryl (BOS) <[cheryl.leger@sfgov.org](mailto:cheryl.leger@sfgov.org)> wrote:

Dear Karl Kramer and Jordan Santagata: The Sunshine Ordinance Task Force scheduled your complaint, listed below, for a hearing on June 1, 2022, and due to your failure to appear the Task Force tabled your complaint and considers the matter concluded. If you believe that your complaint has been tabled in error please inform the SOTF Administrator with 60 days for instructions regarding possible reconsideration.

**File No. 21148:** Complaint filed by Jordan Santagata and Karl Kramer against the San Francisco Employees' Retirement System for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24, and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.

The Petitioner was not present for the hearing and did not notify the Administrator of their absence.

A representative of the San Francisco Employees Retirement System (Respondent) was present for the hearing.

**Action: Moved by Vice-Chair Wong, seconded by Member Stein to close the matter per Sunshine Ordinance Task Force Complaint Procedures Section 7B.**

Public Comment:

None.

**The motion PASSED by the following vote:**

Ayes: 10 - Wong, Stein, Schmidt, LaHood, Padmanabhan, Hyland, Neighbors, Hill, Wolfe, Yankee

Noes: 0 - None

Please let me know if you have questions. Thank you.



Cheryl Leger

Assistant Clerk, Board of Supervisors

[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)

Tel: 415-554-7724

Fax: 415-554-5163

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## ***San Francisco Living Wage Coalition***

***2940 – 16<sup>th</sup> Street #301***

***San Francisco, CA 94103***

***ph. 415-863-1225 • fax 863-1927 • email: [sflivingwage@gmail.com](mailto:sflivingwage@gmail.com)***

***[www.livingwage-sf.org](http://www.livingwage-sf.org)***



**From:** SOTF, (BOS)  
**Sent:** Monday, June 20, 2022 11:50 AM  
**To:** Jordan Santagata; San Francisco Living Wage; Scott, William (POL); Reilly, Lynn (POL); 81412-71801448@requests.muckrock.com; director@thepatternistheproof.org; johnwtempleton blackmoney.com; Ionin, Jonas (CPC); 81227-34819567@requests.muckrock.com  
**Cc:** Young, Victor (BOS)  
**Subject:** SOTF - Notice of Appearance, July 6, 2022 - Sunshine Ordinance Task Force; 4:00 PM; Remote Meeting  
**Attachments:** SOTF - Complaint Procedure 2019-10-02 FINAL.pdf

Good Morning:

You are receiving this notice because you are named as a Complainant or Respondent in the following complaints scheduled before the Sunshine Ordinance Task Force to: 1) hear the merits of the complaint; 2) issue a determination; and/or 3) consider referrals from a Task Force Committee. ***Please confirm your attendance.***

Date: July 6, 2022

Location: Remote Meeting

Time: 4:00 p.m.

Complainants: Your attendance is required for this meeting/hearing.

Respondents/Departments: Pursuant to Section 67.21 (e) of the Ordinance, the custodian of records or a representative of your department, who can speak to the matter, is required at the meeting/hearing.


Complaints:

1. **File No. 21148:** Complaint filed by Jordan Santagata and Karl Kramer against the San Francisco Employees' Retirement System for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24, and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.
2. **File No. 19124:** Complaint filed by Anonymous against Chief William Scott and Lt. R. Andrew Cox and the Police Department for violating Administrative Code (Sunshine Ordinance), Section 67.26, by failing to key by footnote or other clear reference for the appropriate justification for withholdings.
3. **File No. 19112:** Complaint filed by Anonymous against Chief William Scott and Lt. R. Andrew Cox and the Police Department for violating Administrative Code (Sunshine Ordinance), Sections 67.25, 67.26, 67.27, by failing to respond to an Immediate Disclosure Request in a timely and/or complete manner, failing to justify withholding of records and failing to maintain a Proposition G calendar.

4. **File No. 22004:** Complaint filed by Karioki Uhuru against the Police Department for allegedly violating Administrator Code (Sunshine Ordinance), Sections 67.21, by failing to respond to a public records request in a timely and/or complete manner.
5. **File No. 22027:** Complaint filed by John Templeton against the Planning Department for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.7; 67.21, and 67.29-7, by failing to post an agenda containing a meaningful description of each item of business to be transacted or discussed at the meeting; failing to respond to a request for public records in a timely and/or complete manner; and failing to maintain and preserve all documents in a professional manner.
6. **File No. 22028:** Complaint filed by John Templeton against the Historic Preservation Commission for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.7; 67.21, and 67.29-7, by failing to post an agenda containing a meaningful description of each item of business to be transacted or discussed at the meeting; failing to respond to a request for public records in a timely and/or complete manner; and failing to maintain and preserve all documents in a professional manner.

For inclusion in the agenda packet, supplemental/supporting documents must be received by **5:00 PM, June 29, 2022**.

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
Tel: 415-554-7724

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**Leger, Cheryl (BOS)**

---

**From:** San Francisco Living Wage <sflivingwage@gmail.com>  
**Sent:** Monday, June 20, 2022 4:33 PM  
**To:** SOTF, (BOS)  
**Subject:** Re: SOTF - Notice of Appearance, July 6, 2022 - Sunshine Ordinance Task Force; 4:00 PM; Remote Meeting

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

Hi Cheryl,

I confirm my attendance. Thank you.

Regards,  
Karl Kramer



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On Mon, Jun 20, 2022 at 11:51 AM SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)> wrote:

Good Morning:

You are receiving this notice because you are named as a Complainant or Respondent in the following complaints scheduled before the Sunshine Ordinance Task Force to: 1) hear the merits of the complaint; 2) issue a determination; and/or 3) consider referrals from a Task Force Committee. ***Please confirm your attendance.***

Date: July 6, 2022

Location: Remote Meeting

Time: 4:00 p.m.

Complainants: Your attendance is required for this meeting/hearing.

Respondents/Departments: Pursuant to Section 67.21 (e) of the Ordinance, the custodian of records or a representative of your department, who can speak to the matter, is required at the meeting/hearing.

Complaints:

1. **File No. 21148:** Complaint filed by Jordan Santagata and Karl Kramer against the San Francisco Employees' Retirement System for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24, and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.


2. **File No. 19124:** Complaint filed by Anonymous against Chief William Scott and Lt. R. Andrew Cox and the Police Department for violating Administrative Code (Sunshine Ordinance), Section 67.26, by failing to key by footnote or other clear reference for the appropriate justification for withholdings.
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## ***San Francisco Living Wage Coalition***

***2940 – 16<sup>th</sup> Street #301***

***San Francisco, CA 94103***

***ph. 415-863-1225 · fax 863-1927 • email: [sflivingwage@gmail.com](mailto:sflivingwage@gmail.com)***

***[www.livingwage-sf.org](http://www.livingwage-sf.org)***



Virus-free, [www.avast.com](http://www.avast.com)



**Leger, Cheryl (BOS)**

---

**From:** Worsfold, Stephen (RET)  
**Sent:** Thursday, June 30, 2022 6:38 PM  
**To:** SOTF, (BOS); Leger, Cheryl (BOS)  
**Cc:** RET - SFERS, Info  
**Subject:** RE: SOTF - Sunshine Ordinance Task Force June 1, 2022 Meeting - Agenda and Packet Online

Good evening,

Can we please reschedule our hearing until October? We currently don't have someone to represent the Retirement System because of the fourth of July holiday.

Kind regards,

Stephen Worsfold

**From:** SOTF, (BOS) <sotf@sfgov.org>  
**Sent:** Thursday, June 30, 2022 3:14 PM  
**To:** Jordan Santagata <jordan.santagata@sjsu.edu>; San Francisco Living Wage <sflivingwage@gmail.com>; RET - SFERS, Info <sfersinfo@sfgov.org>; Karioki Uhuru <director@thepatternistheproof.org>; Reilly, Lynn (POL) <Lynn.Reilly@sfgov.org>; Waaland, Kathryn (POL) <kathryn.waaland@sfgov.org>; johnwtempleton blackmoney.com <johnwtempleton@blackmoney.com>; Ionin, Jonas (CPC) <jonas.ionin@sfgov.org>; Lynch, Laura (CPC) <laura.lynch@sfgov.org>; Son, Chanbory (CPC) <chanbory.son@sfgov.org>  
**Cc:** Young, Victor (BOS) <victor.young@sfgov.org>  
**Subject:** SOTF - Sunshine Ordinance Task Force June 1, 2022 Meeting - Agenda and Packet Online


Good Afternoon:

The agenda and packet for the of the Sunshine Ordinance Task Force July 6, 2022 4:00 p.m. meeting is online at the following link:

[https://sfgov.org/sunshine/sites/default/files/sotf\\_070622\\_agenda.pdf](https://sfgov.org/sunshine/sites/default/files/sotf_070622_agenda.pdf)

The packet material is linked to each item listed on the agenda marked with an "attachment". Click anywhere on the title of the item to open the link to the pdf of the packet material in question.

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)  
Tel: 415-554-7724  
Fax: 415-554-5163  
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**Leger, Cheryl (BOS)**

---

**From:** San Francisco Living Wage <sflivingwage@gmail.com>  
**Sent:** Tuesday, July 5, 2022 1:50 PM  
**To:** SOTF, (BOS)  
**Cc:** Jordan Santagata  
**Subject:** Re: FW: SOTF - Sunshine Ordinance Task Force June 1, 2022 Meeting - Agenda and Packet Online

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

Hi Cheryl,

That would be fine.

Regards,  
Karl

On Tue, Jul 5, 2022 at 10:35 AM SOTF, (BOS) <sotf@sfgov.org> wrote:

Gentlemen: Please see the request for a postponement below. Are you willing to wait until October for this hearing as requested by the Respondent? Thank you.

I will be out of the office on July 1 and August 5 through August 8. For questions regarding the Sunshine Ordinance, please contact Victor Young at [Victor.Young@sfgov.org](mailto:Victor.Young@sfgov.org).

Cheryl Leger

Assistant Clerk, Board of Supervisors

[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)

Tel: 415-554-7724

Fax: 415-554-5163

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---

**From:** Worsfold, Stephen (RET) <[stephen.worsfold@sfgov.org](mailto:stephen.worsfold@sfgov.org)>  
**Sent:** Tuesday, July 5, 2022 10:28 AM  
**To:** SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)>; Leger, Cheryl (BOS) <[cheryl.leger@sfgov.org](mailto:cheryl.leger@sfgov.org)>  
**Cc:** RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)>  
**Subject:** RE: SOTF - Sunshine Ordinance Task Force June 1, 2022 Meeting - Agenda and Packet Online

Good morning,

I just wanted to follow up with my request to move the hearing date for the Retirement System to a later date. We do not have a representative available from our department to attend tomorrow's SOTF meeting.

Thank you,

Steve

---

**From:** Worsfold, Stephen (RET)  
**Sent:** Thursday, June 30, 2022 6:38 PM  
**To:** SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)>; Leger, Cheryl (BOS) <[cheryl.leger@sfgov.org](mailto:cheryl.leger@sfgov.org)>  
**Cc:** RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)>  
**Subject:** RE: SOTF - Sunshine Ordinance Task Force June 1, 2022 Meeting - Agenda and Packet Online

Good evening,

Can we please reschedule our hearing until October? We currently don't have someone to represent the Retirement System because of the fourth of July holiday.

Kind regards,

Stephen Worsfold

---

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**Sent:** Thursday, June 30, 2022 3:14 PM  
**To:** Jordan Santagata <[jordan.santagata@sjsu.edu](mailto:jordan.santagata@sjsu.edu)>; San Francisco Living Wage <[sflivingwage@gmail.com](mailto:sflivingwage@gmail.com)>; RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)>; Karioki Uhuru <[director@thepatternistheproof.org](mailto:director@thepatternistheproof.org)>; Reilly, Lynn (POL) <[Lynn.Reilly@sfgov.org](mailto:Lynn.Reilly@sfgov.org)>; Waaland, Kathryn (POL) <[kathryn.waaland@sfgov.org](mailto:kathryn.waaland@sfgov.org)>; johnwtempleton <[blackmoney.com](mailto:blackmoney.com)> <[johnwtempleton@blackmoney.com](mailto:johnwtempleton@blackmoney.com)>; Ionin, Jonas (CPC) <[jonas.ionin@sfgov.org](mailto:jonas.ionin@sfgov.org)>; Lynch, Laura (CPC) <[laura.lynch@sfgov.org](mailto:laura.lynch@sfgov.org)>; Son, Chanbory (CPC) <[chanbory.son@sfgov.org](mailto:chanbory.son@sfgov.org)>  
**Cc:** Young, Victor (BOS) <[victor.young@sfgov.org](mailto:victor.young@sfgov.org)>  
**Subject:** SOTF - Sunshine Ordinance Task Force June 1, 2022 Meeting - Agenda and Packet Online

Good Afternoon:

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Cheryl Leger

Assistant Clerk, Board of Supervisors

**Leger, Cheryl (BOS)**

---

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**Sent:** Tuesday, July 5, 2022 10:28 AM  
**To:** SOTF, (BOS); Leger, Cheryl (BOS)  
**Cc:** RET - SFERS, Info  
**Subject:** RE: SOTF - Sunshine Ordinance Task Force June 1, 2022 Meeting - Agenda and Packet Online

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Thank you,

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**Sent:** Thursday, June 30, 2022 6:38 PM  
**To:** SOTF, (BOS) <sotf@sfgov.org>; Leger, Cheryl (BOS) <cheryl.leger@sfgov.org>  
**Cc:** RET - SFERS, Info <sfersinfo@sfgov.org>  
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Stephen Worsfold

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**To:** Jordan Santagata <jordan.santagata@sjsu.edu>; San Francisco Living Wage <sflivingwage@gmail.com>; RET - SFERS, Info <sfersinfo@sfgov.org>; Karioki Uhuru <director@thepatternistheproof.org>; Reilly, Lynn (POL) <Lynn.Reilly@sfgov.org>; Waaland, Kathryn (POL) <kathryn.waaland@sfgov.org>; johnwtempleton blackmoney.com <johnwtempleton@blackmoney.com>; Ionin, Jonas (CPC) <jonas.ionin@sfgov.org>; Lynch, Laura (CPC) <laura.lynch@sfgov.org>; Son, Chanbory (CPC) <chanbory.son@sfgov.org>  
**Cc:** Young, Victor (BOS) <victor.young@sfgov.org>  
**Subject:** SOTF - Sunshine Ordinance Task Force June 1, 2022 Meeting - Agenda and Packet Online

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Cheryl Leger

Assistant Clerk, Board of Supervisors

[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)

Tel: 415-554-7724

Fax: 415-554-5163

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**From:** SOTF, (BOS)  
**Sent:** Thursday, September 22, 2022 11:22 AM  
**To:** yulihuang@gmail.com; Steinberg, David (DPW); Anonymous; Jung, Charles (REG); Arntz, John (REG); San Francisco Living Wage; gizellejane215@gmail.com; Fletcher, Karen (ADP); Tullock, Cristel (ADP); Worsfold, Stephen (RET)  
**Cc:** Young, Victor (BOS); Somera, Alisa (BOS); mark.price.wolf@sfcityatty.org; RIES, DAVID (CAT); Calvillo, Angela (BOS)  
**Subject:** SOTF - Notice of Appearance, October 5, 2022 - Sunshine Ordinance Task Force; 4:00 PM; Remote Meeting  
**Attachments:** SOTF - Complaint Procedure 2019-10-02 FINAL.pdf

Good Morning:

You are receiving this notice because you are named as a Complainant or Respondent in the following complaints scheduled before the Sunshine Ordinance Task Force to: 1) hear the merits of the complaint; 2) issue a determination; and/or 3) consider referrals from a Task Force Committee. ***Please confirm your attendance.***

Date: October 5, 2022

Location: Remote Meeting

Time: 4:00 p.m.

Complainants: Your attendance is required for this meeting/hearing.

Respondents/Departments: Pursuant to Section 67.21 (e) of the Ordinance, the custodian of records or a representative of your department, who can speak to the matter, is required at the meeting/hearing.

Complaints:

**File No. 22013: Hearing Regarding Request for Reconsideration of Complaint 22013.** Complaint filed by Yuli Huang against David Steinberg and Public Works for finding no violation of Administrative Code (Sunshine Ordinance), Section 67.21, by failing to respond to a public records request in a timely and/or complete manner.

**File No. 22104: Hearing Regarding Request for Reconsideration of Complaint No. 22036:** Complaint filed by Anonymous (ARE) against Charles Jung (Elections Commission) for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.25, by failing to respond to an Immediate Disclosure Request in a timely and/or complete manner.


**File No. 22030:** Complaint filed by Gizelle Rabi and Karl Kramer against Karen Fletcher and the Adult Probation Department for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21 by failing to respond to a request for public records in a timely and/or complete manner.

**File No. 21148:** Complaint filed by Jordan Santagata and Karl Kramer against the San Francisco Employees' Retirement System for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24,

and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.

For inclusion in the agenda packet, supplemental/supporting documents must be received by **5:00 PM, September 29, 2022.**

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
Tel: 415-554-7724

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**Leger, Cheryl (BOS)**

---

**From:** Leger, Cheryl (BOS)  
**Sent:** Thursday, September 22, 2022 12:08 PM  
**To:** yulihuang@gmail.com; Steinberg, David (DPW); Anonymous; Jung, Charles (REG); Arntz, John (REG); San Francisco Living Wage; gizellejane215@gmail.com; Fletcher, Karen (ADP); Tullock, Cristel (ADP); Worsfold, Stephen (RET)  
**Cc:** Young, Victor (BOS); Somera, Alisa (BOS); mark.price.wolf@sfcityatty.org; RIES, DAVID (CAT); Calvillo, Angela (BOS)  
**Subject:** FW: SOTF - Notice of Appearance, October 5, 2022 - Sunshine Ordinance Task Force SPECIAL MEETING; 7:00 PM; Remote Meeting  
**Attachments:** SOTF - Complaint Procedure 2019-10-02 FINAL.pdf

Dear Parties and SOTF Members: This Sunshine Task Force meeting is a ***Special Meeting and will begin at 7:00 PM, not the usual 4:00 PM.***

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)  
Tel: 415-554-7724  
Fax: 415-554-5163  
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**Sent:** Thursday, September 22, 2022 11:22 AM  
**To:** yulihuang@gmail.com; Steinberg, David (DPW) <david.steinberg@sfdpw.org>; Anonymous <arecordsrequestor@protonmail.com>; Jung, Charles (REG) <charles.jung@sfgov.org>; Arntz, John (REG) <john.arntz@sfgov.org>; San Francisco Living Wage <sflivingwage@gmail.com>; gizellejane215@gmail.com; Fletcher, Karen (ADP) <karen.fletcher@sfgov.org>; Tullock, Cristel (ADP) <cristel.tullock@sfgov.org>; Worsfold, Stephen (RET) <stephen.worsfold@sfgov.org>  
**Cc:** Young, Victor (BOS) <victor.young@sfgov.org>; Somera, Alisa (BOS) <alisa.somera@sfgov.org>; mark.price.wolf@sfcityatty.org; RIES, DAVID (CAT) <David.Ries@sfcityatty.org>; Calvillo, Angela (BOS) <angela.calvillo@sfgov.org>  
**Subject:** SOTF - Notice of Appearance, October 5, 2022 - Sunshine Ordinance Task Force; 4:00 PM; Remote Meeting

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Date: October 5, 2022

Location: Remote Special Meeting

Time: 7:00 p.m.

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Complaints:

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For inclusion in the agenda packet, supplemental/supporting documents must be received by **5:00 PM, September 29, 2022.**

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
Tel: 415-554-7724

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**Leger, Cheryl (BOS)**

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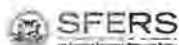
**From:** Worsfold, Stephen (RET)  
**Sent:** Thursday, September 22, 2022 3:30 PM  
**To:** SOTF, (BOS); San Francisco Living Wage; RET - SFERS, Info  
**Subject:** RE: SOTF - Sunshine Task Force October 5, 2022 hearing.

Good afternoon,

Either myself or another representative from SFERS will present for the hearing. Can we please confirm a representative from SF Living Wage will be in attendance? If not we would be fine with pushing the hearing out again.

Thanks,

Stephen Worsfold



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**From:** SOTF, (BOS) <sotf@sfgov.org>  
**Sent:** Thursday, September 22, 2022 3:25 PM  
**To:** Worsfold, Stephen (RET) <stephen.worsfold@sfgov.org>; San Francisco Living Wage <sflivingwage@gmail.com>; RET - SFERS, Info <sfersinfo@sfgov.org>  
**Subject:** RE: SOTF - Sunshine Task Force October 5, 2022 hearing.

Dear Mr. Worsfold and Mr. Kramer: I just received word from Mr. Kramer that he will be out of the country and unavailable for the October Task Force hearing regarding file no. 22030. He has requested a postponement.

Regarding file no. 21148, Mr. Kramer stated that someone else will be appearing for that item. Mr. Worsfold, will you be appearing for this item? Thanks gentlemen.

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)  
Tel: 415-554-7724  
Fax: 415-554-5163  
[www.sfbos.org](http://www.sfbos.org)



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**From:** Worsfold, Stephen (RET) <[stephen.worsfold@sfgov.org](mailto:stephen.worsfold@sfgov.org)>  
**Sent:** Monday, September 19, 2022 11:55 AM  
**To:** SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)>; San Francisco Living Wage <[sflivingwage@gmail.com](mailto:sflivingwage@gmail.com)>; RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)>  
**Subject:** RE: SOTF - Sunshine Task Force October 5, 2022 hearing.

Good morning,

I believe SFERS requested to postpone until the October meeting because of scheduling conflicts. I am not aware any requests for an exchange of records, but I am happy to send along any additional materials, provided we are in possession and are allowed to disclose.

Kind regards,

Stephen Worsfold

**From:** SOTF, (BOS) <[sotf@sfgov.org](mailto:sotf@sfgov.org)>  
**Sent:** Monday, September 19, 2022 11:25 AM  
**To:** San Francisco Living Wage <[sflivingwage@gmail.com](mailto:sflivingwage@gmail.com)>; RET - SFERS, Info <[sfersinfo@sfgov.org](mailto:sfersinfo@sfgov.org)>; Worsfold, Stephen (RET) <[stephen.worsfold@sfgov.org](mailto:stephen.worsfold@sfgov.org)>  
**Subject:** SOTF - Sunshine Task Force October 5, 2022 hearing.

Dear Mr. Kramer and Mr. Worsfold:

At the July 6, 2022 Sunshine Task Force hearing, the following discussion was taken in matter no. 21148.

**File No. 21148:** Complaint filed by Jordan Santagata and Karl Kramer against the San Francisco Employees' Retirement System for allegedly violating Administrative Code (Sunshine Ordinance), Section(s) 67.21, 67.24, and 67.25 and California Public Records Act, Section(s) 6254.26, by failing to respond to a request for public records in a timely and/or complete manner.

The SOTF discussed the agenda and noted that regarding Item 7, the Petitioner and the Respondent agreed to postpone the matter until the October meeting pending an exchange of records.

Has there been an exchange of records? Thank you.

Cheryl Leger  
Assistant Clerk, Board of Supervisors  
[Cheryl.Leger@sfgov.org](mailto:Cheryl.Leger@sfgov.org)  
Tel: 415-554-7724  
Fax: 415-554-5163  
[www.sfbos.org](http://www.sfbos.org)

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