MapLight

November 18, 2022

Senator Steven M. Glazer, Chair, and Committee Members Senate Standing Committee on Elections and Constitutional Amendments State Capitol, Room 410 Sacramento, CA 95814

Dear Chair Glazer and Committee Members,

Thank you for the opportunity to provide testimony for your oversight hearing about the CAL-ACCESS Replacement System (CARS), scheduled for November 29, 2022. Please include this letter in the record as part of my testimony.

MapLight is a nonprofit, nonpartisan organization focused on transparency for money in politics. I cofounded the organization in 2005, 17 years ago, and we work both in California and nationally. MapLight has extensive experience working with CAL-ACCESS data and making it available to journalists and the public.

As part of MapLight's work to improve transparency for campaign finance, MapLight worked with the two previous secretaries of state, Secretary Alex Padilla and Secretary Debra Bowen, to make the data in CAL-ACCESS more accessible to the public. In 2015 MapLight and Secretary Padilla launched "Power Search," a

search engine for California campaign finance data, build by MapLight, that has dramatically improved access to California campaign finance. Prior to Power Search, a citizen who wanted to see how much a particular contributor contributed to California legislators had to download *two hundred* separate Excel spreadsheets and somehow try to combine them. With Power Search, all this information is available on the Secretary of State's website with a few clicks of this mouse. For seven years now, Power Search has been a main way that journalists and citizens make use of CAL-ACCESS data.

"MapLight put together a system that allows the public to quickly sort and view political contributions by candidate, donor, geography, dollar amounts and time frame. It's now possible to instantly check not only contributions by a corporation and its political action committee, but contributions from its employees as well. The donations are updated daily. Its performance has gone from that of a VW Bug to a Tesla."

-San Francisco Chronicle

Why is it important for the public to be able to access campaign finance data? It is important because information about who is supporting our elected representatives is foundational to a healthy democracy. Oversight hearings are public. How lawmakers vote is public information. The money that candidates raise to run for office is public information too. We as citizens need transparency to know who is backing our elected officials as part of holding them accountable in a democracy. Campaign finance information from CAL-ACCESS is an essential tool for journalists, nonprofit groups, and grassroots citizens to shine a light on the forces that affect the laws and lawmakers than govern our state. Campaign finance information on who is backing candidates and ballot measure is also vital for voters to make informed decisions on how to vote

on those candidates and ballot measures. That's why disclosure of the money contributed to campaigns is the law in every state in the country.

But such disclosure matters little when it's difficult or impossible for citizens to obtain and make use of the information. For example, having to download two hundred separate spreadsheets to answer basic questions is "transparency" in name only, not in reality. The public's need for transparency is why it's so important for the state to deliver a CARS system as soon as possible that is both powerful and easy-to-use for the public.

The current CAL-ACCESS legacy system risks outages, as has happened previously, depriving the public of important transparency. The existing legacy system is also cumbersome to use, and impossible to adapt to improved and changing transparency regulations.

MapLight and California Common Cause sent a letter to the Secretary of State in 2018, during the first attempt to implement a CARS system. The letter outlines our recommendations for features to be included to make an easy-to-use and powerful public interface, so that the transparency goals of the system can be appropriately met. A copy of that letter is attached. The recommendations in it are still current today.

In addition to the recommendations in the letter, MapLight also recommends that:

- The CARS project include, as the system is developed, **user testing with citizens**, **journalists**, **and nonprofit groups** for the proposed public interfaces, to make sure that these interfaces meet the needs of public stakeholders.
- After the system launches to the public, there should **be an additional round of user testing and gathering input** from the public, journalists, nonprofits, and other public stakeholders, **with an additional phase of public interface improvements implemented** based on this feedback.

We applaud Secretary Weber's decision to commission an independent analysis of the two previous failed efforts to implement a CARS system. We appreciate the work the Secretary of State staff are undertaking to implement a modern CARS system that serves the public. We are pleased to offer MapLight as a resource for a successful CARS implementation to improve transparency for all Californians.

Sincerely,

Daniel G. Newman President & Co-Founder MapLight

About MapLight

MapLight, a 501(c)(3) nonprofit organization, has been developing and operating innovative technology in the public interest since our founding in 2005. Highlights of our work include:

• **Campaign finance information systems** for government that provide unprecedented transparency for the public and industry-leading efficiency for agency staff. Our clients include the City and County of Denver, Colorado and the State of Maine.

- Voter information systems, including **Voter's Edge** (votersedge.org), a nonpartisan voting guide serving two million voters in California each election season. Voter's Edge is a partnership of MapLight and the League of Women Voters of California Education Fund.
- **Innovative data tools** that combine campaign contributions and votes in Congress. Our data tools and research services highlight patterns of special-interest influence, for transparency and accountability.
- Analysis and journalism about the influence of special interest on government. MapLight's data and reporting have appeared in more than 13,000 news stories and been seen, read, or heard over 300 million times via outlets including ABC News, Bloomberg, the Chicago Tribune, CNN, Fox Business News, Huffington Post, The Intercept, International Business Times, Newsweek, Politico, the Wall Street Journal, the Washington Post, The New York Times, and hundreds more.

Awards

- Society of Professional Journalists Northern California Board of Directors' Distinguished Service to Journalism Award, 2015
- World Affairs Council NextGen Changemakers: Civic Innovation, 2014
- American Library Association's MARS: Emerging Technologies in Reference Best Free Reference Web Site, 2012
- James Madison Freedom of Information Award from the Northern California Chapter of the Society of Professional Journalists 2009
- Library Journal Best Reference, 2008
- Knight-Batten Award for Innovations in Journalism Honorable Mention, 2008
- NetSquared Innovation Awards Finalist, 2008
- Webby Awards Best Politics Website Nominee, 2008
- Stockholm Challenge Award for Public Administration Finalist, 2008
- U.N. World Summit Award for e.Government Winner, 2007





September 14, 2018

The Honorable Alex Padilla Secretary of State 1500 11th Street Sacramento, CA 95814 via email to PRDCARS@sos.ca.gov

Dear Secretary Padilla,

Thank you for your work to improve the CAL-ACCESS system through the CAL-ACCESS Replacement System (CARS) project currently underway. As you know, MapLight and California Common Cause are two public interest organizations who share your goal of making CARS as useful to the public as possible.

We have surveyed the field of campaign finance disclosure systems in other governments and have put together in this letter a list of the most important user interface features — the specific search tools, charts, maps, and other display features that are most important for the public to have so that CARS is most useful. We request that the CARS system your office is building include all the features described in this letter.

The CARS system integrator contract specifies that the CARS system must include charts and maps, but it does not say which ones specifically, and it gives considerable leeway to how the user interface is designed. The purpose of this letter is to help ensure that the final user interface design is as useful as possible to the public.

We would welcome the opportunity to meet with you or your team to discuss these recommendations. Thank you.

Sincerely,

Nicholas Heidorn Policy and Legal Director California Common Cause *NHeidorn@commoncause.org* Daniel Newman President & Co-Founder MapLight dan@maplight.org

I. Searching campaign contributions

The existing Secretary of State Power Search website allows the public to search by nearly all of the criteria below. The CARS website should allow users to search by, at minimum, by these criteria:

- A. Contributions <u>from</u>:
 - 1. One, many, or all contributors
 - 2. Any specific U.S. state of contributor
 - 3. All contributors from states outside California
- B. Contributions <u>to</u>:

1. All recipient committees (Candidates, Ballot Measures, and Other Committees)

- 2. Candidates only:
 - a) One, many or all candidates
 - b) Candidates seeking a specific office (e.g. Governor, or State Senator)
 - c) All candidates from a given political party
- 3. Ballot measures:
 - a) Search by specific text in the measure's title

b) Choose a ballot measure from a drop-down list of all measures, ordered by election date

c) View contributions supporting the measure, opposing the measure, or both

d) Optional checkbox to "Exclude Contributions Between Allied Committees," to avoid misleading double counting of results in cases where committees working on the same ballot measure transfer funds between each other

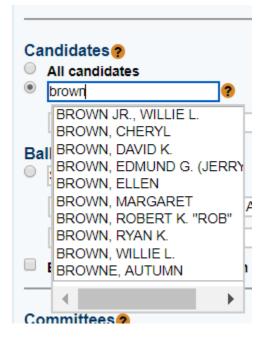
- C. Dates: contribution dates can be selected by:
 - 1. All contribution dates
 - 2. Date range specified by user
 - 3. One or more election cycles

D. Comprehensive contributions data

The search results should include all available data without returning duplicates. Contributions reported in late contribution reports should be included along with those reported in periodic campaign statements.

E. Entering a candidate's name

When a user types a candidate name, the system should provide them with a list of standardized, matching autocomplete options as they type, to facilitate accurate searches. In this example image from Power Search, the user types "brown" and is presented with a list of candidates with "brown" in the name":



II. Search results display

- A. Search results should display, at minimum, the following columns:
 - 1. Recipient committee name*
 - 2. Recipient committee ID*
 - 3. Recipient candidate name*
 - 4. Office sought* (i.e. "State Assembly")
 - 5. District (for state assembly and state senate offices--i.e. "12"

for 12th senate district)

- 6. Ballot measure(s)*
- 7. Contributor name*
- 8. Contributor ID* This should be available whenever applicable. In the current system it is not always available.
- 9. Amount*
- 10. Date*
- 11. Contributor employer*
- 12. Contributor occupation*
- 13. Contributor state*
- 14. Contributor ZIP Code
- 15. Contributor city
- 16. Transaction type
- 17. Election date
- 18. Election cycle

We recommend that the columns marked with a "*" above be displayed by default, with the rest of the columns shown if the user clicks a button to "show more fields."

B. The user should be able to paginate through search results.

C. The user should be able to sort each column in either ascending or descending order, chosen by the user. Ideally this would be done by clicking on each column heading.

D. Prominently displayed in each search result should be a button to download the results as a CSV file (Comma-Separated Value file). Downloaded results should always include all available fields, not just currently displayed fields.

E. At the top of search results a summary should be displayed of the sum of dollars in the search results, and the number of contributions found.

F. When searching for a contributor, the summary at the top of the search results should display results subtotaled by employee and organizational contributions, subdivided by contributions to candidates, ballot measures, and other committees. For example, see this image from Power Search showing results for all contributions that include the text "COMCAST":

 Results Summary

 \$5,306,056.51 in 1,755 contributions ?

 Important - Adjustments may apply for ballot measure. Find out more.

 COMCAST has contributed

 Employee Contributions

 \$232,173.40 to candidates

 \$11,136.00 to ballot measures

 \$66,487.50 to other committees

 Organizational Contributions

 \$1,529,550.69 to candidates

 \$193,100.00 to ballot measures

 \$3,273,608.92 to other committees

G. When searching for a candidate, the summary at the top of the search results should display results subtotaled by committee and election cycle. For examples, see this image from Power Search for a search for Jerry Brown:

Results Summary

\$78,129,478.61 in 29,843 contributions 🥐

Important - Adjustments may apply for ballot measure. Find out more.

BROWN, EDMUND G. (JERRY) has received

(1265698) BROWN FOR ATTORNEY GENERAL has raised \$9,429,049.52 in 5,953 contributions
(1292687) Brown for Attorney General 2010 has raised \$4,005,626.06 in 1,629 contributions
(1292687) JERRY BROWN 2010 has raised \$3,420,335.43 in 868 contributions
(1292687) JERRY BROWN FOR ATTORNEY GENERAL has raised \$41,384.64 in 14 contributions
(1321867) Brown for Governor 2010 has raised \$35,953,598.57 in 18,981 contributions
(1321867) Brown for Governor 2010 Exploratory Committee has raised \$4,499,767.09 in 900 contributions
(1333789) Brown for Governor 2014 has raised \$20,779,717.30 in 1,498 contributions

H. When searching for candidates for a specific office, the summary at the top of the search results should display results subtotaled by specific candidate (top 5 candidates shown, ordered by total contributions). For example, see this image from Power Search for a search for Attorney General candidates for all election cycles since 2001:

Results Summary

Posulte Summary

\$92,817,805.93 in 58,124 contributions 🕐

Important - Adjustments may apply for ballot measure. Find out more.

Top 5 Candidates for ATTORNEY GENERAL have received KELLY, CHRIS in 2009 has raised \$12,822,099.51 in 670 contributions BROWN, EDMUND G. (JERRY) in 2009 has raised \$8,491,843.15 in 2,524 contributions LOCKYER, BILL in 2001 has raised \$8,457,866.88 in 2,507 contributions BROWN, EDMUND G. (JERRY) in 2005 has raised \$7,872,640.70 in 4,670 contributions HARRIS, KAMALA D. in 2009 has raised \$7,569,129.35 in 7,714 contributions

I. When searching for ballot measures in a given election, the summary should display results subtotaled by ballot measure and by support and opposition. For example, see this image from Power Search for a search for June 5, 2018 ballot measures:

\$41,940,109.60 in 1,457 contributions 🥐	
Important - Adjustments may apply for ballot measure. Find out more.	
Ballot Measures on the June 2018 ballot have received	
PROPOSITION 068 - AUTHORIZES BONDS FUNDING PARKS, NATURAL I	RESOURCES PROTECTION, CLIMATE ADAPTATION, WATER QUALITY AND
SUPPLY, AND FLOOD PROTECTION.	
\$9,322,696.63 total raised - 330 contributions	
 Support: \$9,322,696.63 raised - 330 contributions 	
 Oppose: \$0.00 raised - 0 contributions 	
	REVENUES BE USED FOR TRANSPORTATION PURPOSES. LEGISLATIVE
CONSTITUTIONAL AMENDMENT.	
\$26,025,870.62 total raised - 282 contributions	
- Support: \$26,025,870.62 raised - 282 contributions	
- Oppose: \$0.00 raised - 0 contributions	
PROPOSITION 070 - REQUIRES LEGISLATIVE SUPERMAJORITY VOTE A	PPROVING USE OF CAP-AND-TRADE RESERVE FUND. LEGISLATIVE
CONSTITUTIONAL AMENDMENT.	
\$55,346.09 total raised - 40 contributions	
 Support: \$0.00 raised - 0 contributions Oppose: \$55,346.09 raised - 40 contributions 	
	STRUCTED RAIN-CAPTURE SYSTEMS FROM PROPERTY-TAX REASSESSMEN
REQUIREMENT, LEGISLATIVE CONSTITUTIONAL AMENDMENT.	STRUCTED RAIN-CAFTURE STSTEMS FROM FROFERTT-TAX REASSESSMEN
\$96.324.28 total raised - 32 contributions	
- Support: \$96,324.28 raised - 32 contributions	
- Oppose: \$0.00 raised - 0 contributions	
SENATE DISTRICT 29 - SPECIAL RECALL ELECTION	
\$6,439,871.98 total raised - 773 contributions	
- Support: \$131.698.87 raised - 66 contributions	
- Oppose: \$6,308,173.11 raised - 707 contributions	

J. Search results for contributions to ballot measures should clearly show contributions to committees related to more than one ballot measure. For example, see the second row of this image from Power Search:

California Association of Health Facilities, Defend MICRA on the November Ballot Committee, No on 46	1367047	OPPOSED: PROPOSITION 046 - DRUG AND ALCOHOL TESTING OF DOCTORS. MEDICAL NEGLIGENCE LAWSUITS. INITIATIVE STATUTE.	California Association of Health Facilities		\$105.00	Dec 14, 2014
Consumer Watchdog Campaign - Yes on 45 & 46, a coalition of consumer advocates, attorneys and caretakers	1336069	SUPPORTED: PROPOSITION 046 - DRUG AND ALCOHOL TESTING OF DOCTORS. MEDICAL NEGLIGENCE LAWSUITS. INITIATIVE STATUTE. SUPPORTED: PROPOSITION 045	Consumer Watchdog Campaign - Yes on 46	1369500	\$10,000.00	Dec 9, 2014
		- APPROVAL OF HEALTHCARE INSURANCE RATE CHANGES. INITIATIVE STATUTE.				

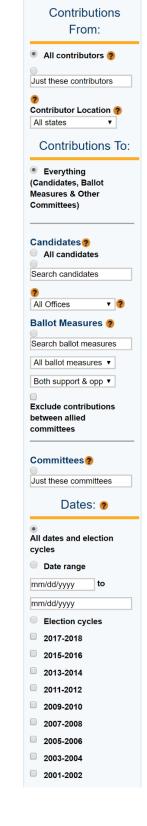
K. In addition to the search functions listed above, there should be a "Quick Search" screen or screens to allow novice users to conduct searches easily without being overwhelmed by options. For example, see this Quick Search screen from the current Power Search site:

Quick Search

Search Options	
Candidates	
Amount Received by Candidates	How much has Search candidates received?
	Search Candidates
Ballot Measures	
Amount Raised for Measures	How much has been raised for all measures on the November 6, 2018 ▼ ballot?
	Search Ballot Measures
Contributors	
Amount Company, Organization, or Person	How much has Company, organization, or person contributed?
Has Contributed	Search Contributors

III. Interface examples

A. This image shows the search controls for the existing Power Search site, as an example of how to create a useful interface in the CARS system:



B. As a second example of a user interface that we recommend copying because is easy to use and powerful, here is the search interface for Federal Election Commission website:

Home > Campaign finance data > Advanced data > Individual contributions							
😑 Edit filters 🛛 🖣	Individual	contributions		Use bulk data to export more than	1 500,000 records.	ے Export	±.
RECIPIENT NAME OR ID	Viewing about 51,988,000 filtered results for: 01/01/2017 - 08/28/2018						
CONTRIBUTOR NAME	Contributor name	Recipient	State	Employer	Receipt v	Amount –	
	TRIOLO, JACOB	FRIENDS OF TODD YOUNG, INC.	VA	CAPITOL TAX PARTNERS	08/28/2018	\$500.00	0
2017-2018 V	ACTBLUE	O'ROURKE FOR CONGRESS	MA		08/21/2018	\$50.00	0
Beginning Ending	ACTBLUE	O'ROURKE FOR CONGRESS	MA		08/21/2018	\$100.00	0
01/01/2017 - 08/28/2018	DAMORA, NATALIE	O'ROURKE FOR CONGRESS	PA	СНИВВ	08/18/2018	\$100.00	0
Contributor details Transaction details	KELLY, KARIN	LISA BLUNT ROCHESTER FOR CONGRESS		SELF-EMPLOYED	08/17/2018	\$2,018.00	0
	FALLETTA, CHARLES	LISA BLUNT ROCHESTER FOR	DE	CERMET MATERIALS INC.	08/17/2018	\$1,000.00 Feedback	0

IV. Additional notes on Search criteria

The examples above were related to search for **campaign contributions**. Similar features and levels of detail should be available for searching for **independent expenditures**, **campaign expenditures**, and **lobbying disclosures** as well.

In addition, it is desirable to have one search interface that covers all four data sets, so that a user can quickly search all the data available on CAL-ACCESS in one place. Users should be able to search for an organization or individual's name in one place and find all records relating to that entity, including contributions to or from the entity, expenditures, and lobbying by that entity.

A. Regarding Lobbying data:

- 1. Users should be able to search by, at minimum:
 - a) Lobbyist name
 - b) Employer
 - c) Client
 - d) Topic or bill
 - e) Government entity lobbied
 - f) Time, by specific date or by legislative cycle

2. Search results should include all of the information above as well as the amount spent on lobbying, and whether the lobbying was in-house or via an external lobbying firm. Search results should include subtotal amounts, similar to the contribution search. Users should be able to define the results they are looking for, so that they can easily find searches such as:

- a) All clients for a given lobbyist
- b) Total spending per lobbying client
- c) Quarterly spending totals for a given client
- d) All lobbyists employed by a given employer
- e) All clients and lobbyists lobbying on a specific topic or bill
- f) Link from named bills to the bill's information on LegInfo

B. Regarding **Campaign Expenditure** data:

- 1. Users should be able to search by, at minimum:
 - a) Spending committee name or ID number
 - b) Affiliated candidate or ballot measure
 - c) Payee name
 - d) Expenditure date or election cycle
 - e) Expenditure code

2. The search results should include the search terms above and the following:

- a) Payee state
- b) Payee city
- c) Payee zip code
- d) Expenditure description
- e) Amount

3. The user should be able to sort each column in either ascending or descending order, chosen by the user. Ideally this would be done by clicking on each column heading.

4. Among other expenditures, payments via contractors (schedule G) should be included with information about the agent or contractor.

C. Regarding **Independent Expenditure** data:

- 1. Users should be able to search by, at minimum:
 - a) Spender name or ID number
 - b) Affected candidate or ballot measure
 - c) Affected candidate office
 - d) Position
 - e) Payee name
 - f) Expenditure date or election cycle

2. The user should be able to sort each column in either ascending or descending order, chosen by the user. Ideally this would be done by clicking on each column heading.

3. The independent expenditure data should include records from all available filings, including committee statements, late independent expenditure reports, and records from the no longer required supplemental independent expenditure report.

D. Regarding **E530 Forms** (communications identifying state candidates) – these should be easily accessible and searchable (a deficiency of the current system).

V. Top contributor lists

A. Top contributors lists from T10 filings should be made available online, by bulk download, and by API.

B. Contributions data for a given committee accessible via searches should be able to replicate the information provided in the top 10 contributor lists.

C. Information about a committee should clearly indicate whether a committee is required to report their top contributors to the FPPC.

VI. Data availability: API with real-time filings

Media organizations, public interest organizations, and members of the public should have the ability to obtain all the data from the system via an API.

Importantly, the API should have data that is as up-to-date as the data displayed on the CARS site. Especially around election season, important reports are filed throughout the day, and the

public should have access to these reports in an API immediately, and should not have to wait until the following day.

VII. Maps

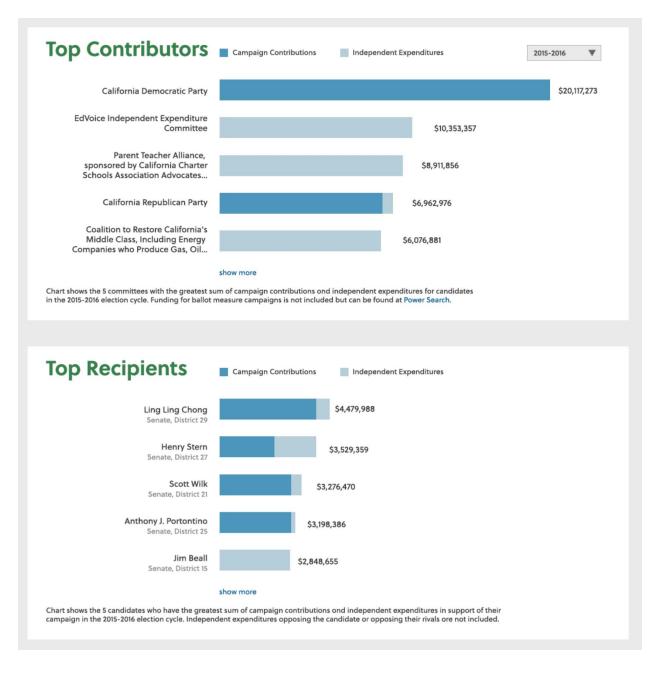
The system should include, at minimum, these geographic maps:

A. Maps of all contributions from one contributor, so, for example, when mapping one contributor who gave to 5 State Senate races, there will be 5 bubbles on a map, centered on 5 different Senate districts. Each bubble will be proportional in size to the amount contributed.

B. Maps of all contributions to one legislator, with a bubble shown for each contribution, proportional in size to the amount contributed.

VIII. Charts

A. To facilitate public understanding, we recommend displaying campaign contributions and independent expenditures together, in a way that users can still distinguish between the two of them. See these example displays:



B. The system should include a chart that that displays which contributors have contributed the most money (see example above).

C. The system should include a chart that displays which recipients (candidates and committees) have received the most money (see example above).

IX. Summary information for a candidate

When viewing a candidate "page" or other summary information for candidate, summary information shown should include:

- A. Candidate name
- B. Candidate ID number and committee ID numbers
- C. Candidate party
- D. Office and district held, if applicable
- E. Office and district sought this cycle
- F. Current election cycle:
 - 1. Total raised
 - 2. Total raised in unitemized contributions (i.e. small contributions)
- G. Top 5 contributors
- H. Top 5 independent spenders in support
- I. Top 5 independent spenders in opposition
- J. Campaign contribution summary data for previous cycles available by selecting the cycle or following a link
- K. Summary of election results from previous cycles
- L. Links to full campaign finance data
- M. Include the charts shown below. Note that they display both campaign contributions and independent expenditures, to give the most complete picture of support for and opposition to a candidate:

losh Newman
2016 General Election 🔻
Candidate for Senate District 29 🔻 (won)
Democratic Party
Overview Support Opposition Timeline Filings
Financial Overview
Support for Josh Newman
\$3,016,523
Opposition to Josh Newman
\$5,919,209
Includes contributions to and expenditures supporting: • Ling Ling Chang anter, consecteur salet adipiscing elit.
Campaign Contributions C Independent Expenditures I Independent Expenditures opposing other candidates
Campaign Contributions to other candidates Independent Expenditures supporting other candidates Independent Expenditures opposing John Newman

Who supports Josh Newman?

Top contributors 🛛

1	California Democratic Party	\$1,729,313
2	San Luis Obispo Democratic Party	\$155,000

\$141,098

- 2 San Luis Obispo Democratic Party
- 3 Newman, Josh
- 4 Santa Barbara County Democratic Central Committee \$115,000
- 5 Humboldt County Democratic Central Committee \$105,000

See all contributions

Top independent spenders in support $^{\textcircled{O}}$

- 1 CALIFORNIA ASSOCIATION OF PSYCHIATRIC TECHNICIANS PAC \$33,043
- 2 Professional Engineers in California Government PEGG PAC \$3,838
- 3 We Are Califonia. A Sponsored Committee of Mobilize the Immigrant Vote Action Fund \$1,445
- 4 DEMOCRATIC PARTY OF ORANGE COUNTY \$390
- See all independent expenditures

Who opposes Josh Newman?

Top independent spenders in opposition [©]

- 1 Coalition to Restore California's Middle \$408,681 Class, Including Energy Companies who Produce Gas, Oil, Jobs ond Pay Toxes
- 2 JOBSPAC, A BI-PARTISAN COALITION \$362,405 OF CALIFORNIA EMPLOYERS
- 3 Califomia Alliance for Progress and Education, on alliance of small business organizations \$312,888
- 4 KEEPING CALIFORNIANS WORKING, DENTISTS, HOUSING PROVIDERS, ENERGY AND INSURANCE AGENTS \$250,929
- 5 Califonia Medical Association Independent Expenditure Committee \$99,315

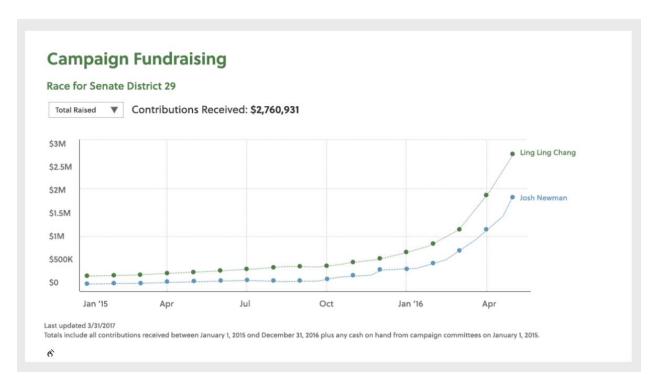
See all independent expenditures

Examine the money behind candidates running against Josh Newman

Ling Ling Chang

X. Comparison chart

A. The system should display a chart comparing fundraising from all candidates in a given race. Here is an example:



XI. Sitewide General Items

A. Use hyperlinks to facilitate navigation, such as linking from a committee named in a campaign finance or lobbying filing to the named committee's filing

B. Offer subscription options (e.g., RSS or email) to be notified of future statements by a filer

C. Display text following standard capitalization rules, rather than in all capital letters

XII. Finding candidates

To make the information on CAL-ACCESS more accessible and relevant to ordinary voters, we request that there be a tool to look up candidates and elected officials by street address or ZIP Code in addition to searching by name, or by office and district. Enter your address (or ZIP Code) and receive a list of the officeholders and candidates for state senate and state assembly for that address, as well as a list of statewide officeholders and candidates. For example, see the FEC website, which does a good job with this:

Search

ELECTION	
2018	
FIND BY ZIP CODE 94709 Q Search Example: 90210	FIND BY STATE AND DISTRICT ₪ Select state ▼ Select district ▼ Q
Results 2017-2018 CANDIDATES IN ZIP CODE 94709	el Sobrante Co H East Richmond Heights Wal
This page shows campaign finance data by district. If no candidates have filed (or if candidates have filed but not yet reported financial data), the district may not show up here.	Tiburon Sausalito Piedmont Oakland
California Senate	San Francisco Broadmoor Brisbane
General election: November 6th, 2018 Current candidates: Show all »	Haywa
California House District 13	Hillsborough

District maps on this page are approximate.

General election: November 6th, 2018

Current candidates: Show all »

XIII. Filing System - General

A. Provide an intuitive step-by-step filing experience, beginning with questions about the filer's activity in the reporting period, rather than the choice of which form to file

B. Automatically suggest and fill the dates for a statement's filing period

C. Save basic information about the filer and pre-populate future filings

D. Customize the filing experience by showing only fields that are relevant to the specific filer type

E. Integrate form instructions into the online filing system and link to relevant manual sections

F. Automatically sum total amounts (e.g., year-to-date totals)

G. Flag potential data entry errors or violations for the user's review

H. Add an optional comment field to each entry for filer remarks

I. Email reminders of upcoming filing deadlines to registered filers

J. Automatically save entered data without the filer needing to click a button

K. Consider providing one-stop filer services (e.g., messaging, fee payment)

XIV. Campaign Finance Filing

A. Automatically sum total amounts (e.g., year-to-date totals)

B. Email correspondence from the Secretary of State to the filer and save in online message center

C. Allow users to save a draft statement while working on another statement (e.g., save a draft of a Form 460, begin work on a Form 497, then return to the draft Form 460)

D. Save entities (e.g. contributors, vendors, etc.) from previous filings and auto-fill future entries

E. Confirm the user's intention via a dialog box before deleting entered information or cancelling a draft statement

F. Save a copy of deleted draft statements (e.g., "Trash") so users can recover if erroneously deleted

G. Ensure navigation buttons are placed in consistent locations (e.g., don't sometimes put the "Cancel" button where the "Back" button usually is)

H. Carry forward all data entered on a draft statement, including zeroes

I. Explore the feasibility of importing data from common accounting software such as Excel or QuickBooks (e.g., by providing a template file and offering an upload option)

J. Design to be compatible with potential future fully-electronic filing, if the Political Reform Act is amended to eliminate paper filing requirements (e.g., allow filing Form 410 online)

XV. Lobbying Filing

A. Save a copy of deleted draft statements (e.g., "Trash") so users can recover if erroneously deleted

B. Create data fields for bills, regulations, and agencies lobbied, and standardize entries to facilitate searches

- C. Add data fields for subcategories of other payments to influence
- D. Automatically save when the user moves to the next page
- E. Offer an option to prepopulate with information from the previous filing

(End of document.)