

Political Consultant Reporting Program
Filing System Instructions and Program Overview
Consultants

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P O R T L A N D
C I T Y A U D I T O R
**Lobbyist Registration
& Political Consultant**



Program Purpose and Authority

The purpose of the Political Consultant Reporting program is to improve transparency by requiring both City elected officials and Political Consultants to disclose activities through registration and quarterly reports.

On April 20, 2016, City Council passed [Ordinance No. 187689](#) creating [City Code Chapter 2.14](#) and requiring reporting by City elected officials (Mayor, Commissioners, and Auditor) and certain Political Consultants.

The program is administered by the City Auditor's Office.

Specifically, the Auditor:

- Is authorized to adopt, amend and repeal administrative rules, policies, procedures and forms for the regulation and enforcement of the program
- Is authorized to conduct appropriate inquiry and audit of reports or statements for completeness and accuracy
- Is authorized to establish fees for late filing or non-filing, and imposing civil penalties for non-compliance
- May obtain confidential and legally privileged information and records held by the City so long as privileged is not waived as to third parties
- May initiate action in Multnomah County Circuit Court to enforce the provisions of program requirements

Use of this Guide

This instructional overview is intended solely as a reference guide. Every effort has been made to present accurate and reliable information; however, information regarding program requirements may change periodically.

Readers should take note that the information contained herein should not be considered as having the same weight and authority as City Code or City Administrative Rules. In the event any information conflicts, this guide is not controlling, and users must instead follow relevant legal authority.

Contact Information

www.portlandoregon.gov/auditor/consultant

Office of the City Auditor

Political Consultant Reporting Program

1221 SW 4th Ave Room 310

Portland, OR 97204-1987

e-mail: consultant@portlandoregon.gov | phone: 503-823-3546

Disclosure Requirements for Political Consultants

Key Definitions:

A Political Consultant is a person or entity that engages in Political Consulting services as a trade or profession and provides these services to a City elected official, successful candidate for City office, or either individual's candidate campaign committee registered with the Secretary of State. The term "Political Consultant" does not include attorneys who provide only legal services, accountants who provide only accounting services, professional fundraisers, or pollsters who provide only polling services.

Political Consulting Services include actions in campaign management and political strategy services, including but not limited to: advocacy and strategy; political polling; advising or assisting in voter contact strategies and services; advising in media strategy, buying and advertisement; providing candidate development, policy training, political image consulting, and designing, implementing and analyzing polls and surveys; performing issues research and opposition research; developing, assisting in strategic communication such as news releases, talking points and speech writing; and advising on negative information handling an political crisis management.

Who must file?

Under the program's code requirements, the following individuals are defined as types of political consultants that must register with the City:

1. Those providing political consultant services on behalf of a City elected official, a successful candidate for City office, or either individual's principal campaign committee.
2. If providing services listed in 1., a political consultant must also provide information on political consultant services related a City-referred ballot measure.

What must be disclosed?

- Date services began
- Name of client or committee
- Relevant contact information
- Names and contact information of principals, employees or contractors providing political consultant services

When must consultants register and terminate registration?

Consultants must register with the Auditor's office within 15 days of providing services as described above and are responsible for updating information. Terminating registration online is required (see page 13) when a political consultant is no longer providing services.

Managing Registration

Log into the online filing system found on the [Auditor's website](#) using a City of Portland account log in affiliated with the consultant or entity. Tip: keep this information as it will be required for logging in, managing the account, and retrieving a password.

The direct filing link is: <https://www.portlandoregon.gov/auditor/consultant/consultant.cfm>.

Once logged in, you will be prompted to file a registration in 5 basic steps: consulting firm/individual information, individual information, campaign service, ballot measure campaign service (if relevant), and review and submittal. The steps are broken down below with instructions and navigations required for each.

In step 1, fill in basic contact information for the entity or consultant, as shown below:

Step 1 of 5: Consulting Firm Registration

[Political consulting firms and individuals](#) must register with the City of Portland if you are a contractor, employee, or principal, provides [political consulting services](#) to the City of Portland office, or either individual's campaign committee registered with the Secretary of State.

— **REGISTRATION TYPE *** _____

Consulting firm
 Individual

— **GENERAL INFORMATION** _____

Entity name *

Political Consultant 1

Address *

1221 SW 4th Ave

Address 2

City *


Portland

State *

OR ▼

ZIP code *

97204

Email * 

consultant@portlandoregon.gov

When finished, click "Continue" toward the bottom of the page.

In step 2, you will be prompted to enter individual consultant(s) information as appropriate, including the staff type (employee, contractor or principal). Note: if registering as an individual rather than an entity, the information in step 1 will be used automatically for this step.

Step 2 of 5: Register Consultants

Please add all individual principals, employees, and contractors provided.

Name	Staff Type	Email
Political Consultant 1	Employee	consultant@portland.gov
Consultant Joe	Principal	consultant@portland.gov

[+ Add Consultant](#)

Continue

Go Back

Add Consultant

CONSULTANT INFORMATION

Staff type *

- Principal
 Employee
 Contractor

Name *

Email *

The individual's address is the same as the consulting firm's address.

Address *

Address 2

City *

State *

ZIP code *

Continue

Cancel

When completed, review the names as entered and press "Continue".

Step 3 requires disclosure of the type of campaign services being provided. Begin this step on the next page by clicking "Add Campaign Service":

Step 3 of 5: Campaign Services

Please add all city elected officials, successful candidates, or campaign committee

Elected Official, Candidate, or Campaign Committee

[+ Add Campaign Service](#)

Continue

Go Back

You will be prompted to 1) pick from a drop down of currently elected City officials, successful candidates, or the name of the committee as filed with the Secretary of State's office in ORESTAR and 2) the date these services began. Click "Continue" when complete:

Add Campaign Service

— RECIPIENT OF POLITICAL CONSULTING SERVICES —

Complete this section by choosing a city elected official/candidate **or** campaign committee

City elected official or candidate

If an elected official or candidate is not displayed, please contact consultant@portlandoregon.gov

— OR —

Campaign committee as listed in Secretary of State's ORESTAR system

— OTHER INFORMATION —

Date services began *

Continue

Cancel

In step 4, you will be prompted to fill out City-referred measure campaign services being provided, if relevant. Follow the same basic steps as above for this campaign service, as shown below in the prompt:

Step 4 of 5: City-referred Measures

Please add all city-referred measures receiving [political consultant services](#).

Ballot Title	Lead Representative/Committee
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[+ Add City-referred Measure](#)

Continue

Go Back

Note: if no City-referred measure campaign services are being provided, click “Continue”.

In the last step, you will be asked to review your submitted information, edit as needed, and submit the registration.

Step 5 of 5: Review & Submit

Please review all information below for accuracy and make any necessary corrections prior

— **CONSULTING FIRM**  [edit](#) —

Registration Type

Consulting firm

Entity name

Political Consultant 1

Address

1221 SW 4th Ave
Portland, OR 97204

Email

consultant@portlandoregon.gov

If the information as entered appears correct, review the final instructions, declarations and acknowledgements. Electronically sign the form with an authorized individual's signature. Click "Submit Registration" once complete. Note: a confirmation email will be sent to the consultant firm's email provided once successfully received.

PUBLIC RECORD DISCLOSURE

Per City Code 2.14.060, the information submitted in this registration report is generally public information and will be posted online. If you would like to have information associated with your personal identity redacted on the report, you must make a request to the City Auditor's Office at consultant@portlandoregon.gov and identify:

1. The information on the report you are requesting for redaction (i.e., physical address, telephone, etc.);
2. A statement that the information, if published, would lead to an unreasonable invasion of your privacy; and
3. Confirmation that the information you are requesting for redaction is not otherwise publicly available.

Please note: The City Auditor's Office follows all laws related to public records disclosure and may be compelled to produce information not published online in an order (for example, a public records order from a court of law following a public records request).

DECLARATION AND SIGNATURE

The following is prohibited conduct under City Code 2.14:

- ▶ A political consultant shall not provide political consulting services without reporting as required under Portland City Code 2.14.
- ▶ No person shall submit false, fraudulent or misleading information on statements, including but not limited to: misrepresenting the scope or nature of services provided or the identity of clients to whom services are provided.
- I acknowledge and affirm under the penalties of false swearing the statements made on this form and that I understand that penalties may be imposed under City Code Chapter 2.14.

Electronic signature of political consulting firm official

Type name to sign

Note:

- ▶ City Code Section 2.14.030 requires a political consulting firm to register with the City Auditor within 15 calendar days after the entity, including any of its co-owners, employees, or principals, provides political consulting services to a City of Portland elected official, successful candidate for elected City office, or either individual on a campaign committee registered with the Secretary of State.
- ▶ The political consulting firm must update their registration information within 15 days if any previously reported information changes.
- ▶ Such registrations remain in effect until terminated by the political consulting firm.

Submit Registration

Go Back

Updating a Consultant Registration

Updates to a political consultant registration, such as changes in individuals involved in a campaign providing political consultant services, types of services being provided, or contact information, are required to be submitted within 15 days of any change. Log into your account by going to the consultant [application log in page](#) to find the menu options below.

Click on “Manage Registration” to be directed to the pages where you can edit the type of organization as well as edit screens for each individual consultant listed and their contact information.

Political Consultant Registration

Consulting Firm Registration



*Update your firm's registration,
consultants, or campaign services, etc.*



Manage Registration

[Review Registration](#)

[Terminate Registration](#)

The option to edit entered information will appear after the organization’s basic contact and type page as shown in step 1 of registering an entity. Once completed, click “Continue”.

Next, click on any consultant or “Add Consultant” links to edit information on registered consultants.

When finished, click “Continue”.

Step 2 of 5: Register Consultants

Please add all individual principals, employees, and contractors providing

Name	Staff Type	Email
Political Consultant 1	Employee	consultant@portlan
Consultant Joe	Principal	consultant@portlan

[+ Add Consultant](#)

Continue

Go Back

The following screen allows for edits to the types of services being provided by the organization or individual. Click on the current service to edit or delete entered information or click “Add Campaign Service” to add a service not currently disclosed.

Step 3 of 5: Campaign Services

Please add all city elected officials, successful candidates, or campaign

Elected Official, Candidate, or Campaign Committee

[Commissioner's Committee](#)

[+ Add Campaign Service](#)

Continue

Go Back

The same option is provided for City-referred measure campaign services on the next screen and edits can be made or services added to the registration:

Step 4 of 5: City-referred Measures

Please add all city-referred measures receiving [political consultant services](#).

Ballot Title

Lead Representative/Committee

[+ Add City-referred Measure](#)


Continue

Go Back

On the final page you can review all entered information and make corrections as needed by clicking “edit” on the side of each item as shown below.

Step 5 of 5: Review & Submit

Please review all information below for accuracy and make any necessary corrections

— CONSULTING FIRM  [edit](#)

Registration Type

Consulting firm

Entity name

Political Consultant 1

Address

1221 SW 4th Ave
Portland, OR 97204

Email

consultant@portlandoregon.gov

Phone

503-823-3546

Once correct, scroll down to read and confirm acknowledgements about program requirements and electronically sign the updated registration to confirm the changes as shown on the following page.

PUBLIC RECORD DISCLOSURE

Per City Code 2.14.060, the information submitted in this registration report is general. If you would like to have information associated with your personal identity redacted, contact the City Auditor's Office at consultant@portlandoregon.gov and identify:

1. The information on the report you are requesting for redaction (i.e., physical address, phone number, etc.)
2. A statement that the information, if published, would lead to an unreasonable invasion of your privacy.
3. Confirmation that the information you are requesting for redaction is not otherwise available to the public.

Please note: The City Auditor's Office follows all laws related to public records disclosure and may require a public records order (for example, a public records order from a court of law following a public records request).

DECLARATION AND SIGNATURE

The following is prohibited conduct under City Code 2.14:

- ▶ A political consultant shall not provide political consulting services without reporting the nature of the services provided.
 - ▶ No person shall submit false, fraudulent or misleading information on statements of the nature of services provided or the identity of clients to whom services are provided.
- I acknowledge and affirm under the penalties of false swearing the statements made above are true and correct. Penalties may be imposed under City Code Chapter 2.14.

Electronic signature of political consulting firm official

Type name to sign

Note:

- ▶ City Code Section 2.14.030 requires a political consulting firm to register with the City Auditor, employees, or principals, provides political consulting services to a City of Portland elected official or campaign committee registered with the Secretary of State.
- ▶ The political consulting firm must update their registration information within 15 days if any principal or employee changes.
- ▶ Such registrations remain in effect until terminated by the political consulting firm.

[Update Registration](#)

[Go Back](#)

You can also skip to this last page to quickly review and edit any part of the registration from the home menu by clicking "Review Registration" from the consultant home page as shown below:

Political Consultant Registration

Consulting Firm Registration



Update your firm's registration, consultants, or campaign services, etc.

Manage Registration

[Review Registration](#)

[Terminate Registration](#)

Terminating a Registration in the Online System

Terminating a registration is required 15 within termination of political consultant services. After a termination request is submitted, the consultant will no longer be listed as an active political consultant in public reports. Follow the below steps to submit a termination of political consultant services using the online filing system. Log into [the consultant application](#) and select "Terminate Registration" from the main menu.

Political Consultant Registration

Consulting Firm Registration



Update your firm's registration, consultants, or campaign services, etc.

Manage Registration

[Review Registration](#)

[Terminate Registration](#)

Confirm that the registration should be terminated and add the date that services ended on the next screen, as shown below:

Consulting Firm Registration Termination

Within 15 days of terminating [political consulting services](#) you must complete a list of active political consultants.

— REGISTRATION TERMINATION —

Are you sure you want to terminate your registration? (You must register again)

Yes, Political Consultant 1 has ended all political consultant services and will terminate their registration.

Date services ended *

Terminate Registration

Cancel

After clicking “Terminate Registration” the application will confirm your termination and you will be logged out of the application.

Questions about these instructions or other aspects of the Political Consultant Reporting program can be directed to: consultant@portlandoregon.gov | phone: 503-823-3546.