

## **QUARTERLY PUBLIC OFFICIAL DISCLOSURE FORM INSTRUCTIONS**

**NOTE:** This form is to be filed only by those individuals who are also required to file an Annual Verified Statement of Economic Interest as defined in ORS 244.050.

Place a checkmark in the box at the top of the page that corresponds to the quarter you are reporting.

### **SECTION 1 –**

(a) Please use the same name, jurisdiction and position information that appears on the label of your Statement of Economic Interest form. If your mailing address has changed, please place a checkmark in the address correction box. If you are a new appointee, please make sure that the jurisdiction you are serving has provided your information to the Government Ethics Commission.

(b) You must sign and date the form. Please provide a telephone number in the event that we may need to contact you.

### **SECTION 2 –**

Provide the information requested in items A, B, C and D. Please indicate "N/A" if the item does not apply to you. You may attach additional sheets if necessary.

Items A and B do not require disclosure of expenses reimbursed to you by your public employer for official business purposes.

Please use the following definitions and statutory references to assist you when completing the form:

### **DEFINITIONS**

1. **"Income"** means income of any nature derived from any source, including but not limited to any salary, wage, advance, payment, dividend, interest, rent, honorarium, return of capital, forgiveness of indebtedness, income from government sources (i.e., social security, your public salary, etc.), retirement income, real estate transactions, inheritance income, or anything of economic value received as income.
2. **"Legislative or Administrative Interest"** means an economic interest, distinct from that of the general public, in one or more bills, resolutions, regulations, proposals or other matters subject to the action or vote of the public official.
3. **"Member of Household"** means any person who resides with the public official.
4. **"Relative"** means the spouse or domestic partner of the public official; any children, siblings, spouses of siblings or parents of the public official or of the public official's spouse; any individual for whom the public official has a legal support obligation; or an individual for whom the public official provides benefits arising from the public official's public employment or from whom the public official receives benefits arising from that individual's employment.
5. **"Honoraria"** means a payment of something of economic value given to a public official in exchange for services upon which custom or propriety prevents the setting of a price. Services include, but are not limited to, speeches or other services rendered in connection with an event.

### **STATUTORY REFERENCES**

**ITEM A - ORS 244.020(5)(b)(F)** – Reasonable expenses paid by any unit of the federal government, a state or local government, a Native American tribe that is recognized by federal law or formally acknowledged by a state, a membership organization to which a public body as defined in ORS 174.109 pays membership dues or a not-for-profit corporation that is tax exempt under section 501(c)(3) of the Internal Revenue Code and that receives less than five percent of its funding from for-profit organizations or entities, for attendance at a convention, fact-finding mission or trip, or other meeting if the public official is scheduled to deliver a speech, make a presentation, participate on a panel or represent state government as defined in ORS 174.111, a local government as defined in ORS 174.116 or a special government body as defined in ORS 174.117.

**ITEM B - ORS 244.020(5)(b)(H)** – Reasonable food, travel or lodging expenses provided to a public official, a relative of the public official accompanying the public official, a member of the household of the public official accompanying the public official or a staff member of the public official accompanying the public official, when the public official is representing state government as defined in ORS 171.111, a local government as defined in ORS 174.116 or a special government body as defined in ORS 174.117.

**ITEM C - ORS 244.042 –**

(1) Except as provided in subsection (3) of this section, a public official may not solicit or receive, whether directly or indirectly, honoraria for the public official or any member of the household of the public official if the honoraria are solicited or received in connection with the official duties of the public official.

(2) Except as provided in subsection (3) of this section, a candidate for public office may not solicit or receive, whether directly or indirectly, honoraria for the candidate or any member of the household of the candidate if the honoraria are solicited or received in connection with the official duties of the public office for which the person is a candidate.

(3) This section does not prohibit:

(a) The solicitation or receipt of an honorarium or a certificate, plaque, commemorative token or other item with a value of \$50 or less; or

(b) The solicitation or receipt of an honorarium for services performed in relation to the private profession, occupation, avocation or expertise of the public official or candidate.

**NOTICES**

Providers of expenses or honoraria reported in Section 2, A and C of the disclosure form are required to provide a notice of value to you within 10 days of the event. Please attach a copy of the notice provided to you or indicate why the notice is not available.

**ORS 244.100(2)(a)** Any organization or unit of government that provides a public official with expenses with an aggregate value exceeding \$50 for an event described in ORS 244.020(5)(b)(F) shall notify the public official in writing of the amount of the expense. The organization or unit shall provide the notice to the public official within 10 days from the date the expenses are incurred. *(See Section 2-A of the disclosure form.)*

**ORS 244.100(2)(b)** Any person that provides a public official or a member of the household of a public official with an honorarium or other item allowed under ORS 244.042 with a value exceeding \$15 shall notify the public official in writing of the value of the honorarium or other item. The person shall provide the notice within 10 days after the date of the event for which the honorarium or other item was received. *(See Section 2-C of the disclosure form.)*

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\*\* Please make a copy of the completed form and retain it for your own records.

\*\* Failure to complete and file this form by the final date for filing may subject you to an automatic civil penalty of \$10 for each of the first 14 days the statement is late and \$50 for each day thereafter, up to a maximum of \$5,000.

\*\* Please return the completed form to the address below, postmarked not later than the 15<sup>th</sup> of the month following the quarter you are reporting. Please contact the OGE at **503-378-5105** if you have questions.

**Oregon Government Ethics Commission  
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