



**CITY OF SANTA MONICA  
OAKS INITIATIVE  
DISCLOSURE FORM**

In order to facilitate compliance with the requirements of the Oaks Initiative, the City compiles and maintains certain information. That information includes the name of any person or persons who is seeking a "public benefit." If the "public benefit" is sought by an entity, rather than an individual person, the information includes the name of every person who is: (a) trustee, (b) director, (c) partner, (d) officer, or has (e) more than a ten percent interest in the entity.

Public benefits include:

1. Personal services contracts in excess of \$25,000 over any 12-month period;
2. Sale of material, equipment or supplies to the City in excess of \$25,000 over a 12-month period;
3. Purchase, sale or lease of real property to or from the City in excess of \$25,000 over a 12-month period;
4. Non-competitive franchise awards with gross revenue of \$50,000 or more in any 12-month period;
5. Land use variance, special use permit, or other exception to an established land use plan, where the decision has a value in excess of \$25,000;
6. Tax "abatement, exception, or benefit" of a value in excess of \$5,000 in any 12-month period; or
7. Payment of "cash or specie" of a net value to the recipient of \$10,000 in any 12-month period.

Name(s) of persons or entities receiving public benefit:

The company/vendor name belongs here

[NOTE: Doing business with the City is considered a public benefit which is why vendors need to complete the Oaks form.]

Name(s) of trustees, directors, partners, and officers:

List names of any persons meeting the criteria defined above. Every company has at least an owner or officer (ex. President, COO, CEO) - that name would go here.

[NOTE: If the company has a long list of names meeting this criteria, as with some corporations, then indicate "See attached list" in this field and attach the list as backup.]

Name(s) of persons with more than a 10% equity, participation, or revenue interest:

List names of any persons meeting the criteria defined above. This applies to person(s) only, do not list companies or other entities.

[NOTE: If there are no persons with more than a 10% equity, participation, or revenue interest, then indicate "None" in this field.]

Prepared by: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

FOR CITY USE ONLY:

Bid/PO/Contract # \_\_\_\_\_

Permit # \_\_\_\_\_