

6 Chapter 6: Contracts Disclosure Form

Complete and submit a Contracts Disclosure Form with the proposal as Attachment C.

» Contracts Disclosure Form

Our response to Attachment C, Contracts Disclosure Form is included on the following pages.



Contracts Disclosure Form

This form can be completed online at www.sanantonio.gov/ethics.
If form cannot be completed online, please print, complete and submit
with proposal. All questions must be answered.

For details on use of this form, see Section 2-59 through 2-61 of the City's Ethics Code.

* This is a: ☒ New Submission ☐ Correction ☐ Update to previous submission

* 1) Name of person submitting this disclosure form.

*First Clifton *M.I. F. *Last Douglass Suffix III

* 2) Contract Information

a) Contract or Project Name: Collection of Delinquent Property Taxes (RFP 23-037; RFx 6100016799)

b) Originating Department: City of San Antonio - Finance Department

* 3) Disclosure of parties, owners, and closely related persons.

a) Name of individual(s) or entity(ies) seeking a contract with the city.
(NOTE: Give exact legal name as it will appear on the contract, if awarded.)

Linebarger Goggan Blair & Sampson, LLP

b) Name and title of contract signatory

Clifton F. Douglass III, Managing Partner

c) Name of all owners, board members, executive committee members, and officers of entities listed in question 3a.

David G. Aelvoet, Daniel Albidrez, Jake Battenfield, Douglas Steven Bird, Charles Brady, Kelly Burnette, Lucy G. Canales, Paul Daniel Chapa, Mark Ciavaglia, John Dillman, Clifton F. Douglass III, Corey Fickes, Mark A. Flowers, Elva Galvan, Wade Gent, Lilia Gibson, Cristina Gonzalez, Tara Grundemeier, Lori Gruver, John D. Guevara, James Harris, Mark Harris, Richard Hill, Jim L. Lambeth, Pamela Pope Lee, Glenn O. Lewis, Bridget Moreno Lopez, Edward Lopez Jr., Scott A. McGlasson, Norman J. Nelson, Anthony Nims, Jose Padilla, Carmen I. Perez, Ronald Rocha, Kelly Rivera Salazar, Herbert A. "Trey" Stone, Charles A. "Chip" Sutton, Barbara M. Williams, Tanya F. Eriksson Wood, Christopher B. Young



*** 4) List any individual(s) or entity(ies) that is a partner, parent, joint venture, or subsidiary entity(ies) of the individual or entity listed in Question 3.**

☐ Not applicable. Contracting party(ies) does not have partner, parent, joint venture, or subsidiary entities.

If applicable, list below names and type of relationship (partner, parent, joint venture or subsidiary entities, and all the owners, board members, executive committee members, officers of each entity):

Please see attached pages.

*** 5) List any individuals or entities that will be subcontractors on this contract.**

☐ Not applicable. No subcontractors will be retained for this contract.

☐ Subcontractors may be retained, but have not been selected at the time of this submission.

If applicable, list below subcontractors, including the name of the owner(s), and business name:

Owners Name: Pablo Escamilla and Douglas A. Poneck - Business Name: Escamilla & Poneck, LLP
Owner Name: Katy Bryant - Business Name: Laser Printers and Mailing Services, LLC
Owner Name: Dee Hernandez - Business Name: Universal Pen & Print Inc/Cubie

*** 6) List any attorneys, lobbyists, or consultants retained by any individuals listed in Questions 3, 4, or 5 to assist in seeking this contract.**

☐ Not applicable. No attorneys, lobbyists, or consultants have been retained to assist in seeking this contract.

If applicable, list below names and type (attorneys, lobbyists, or consultants) retained to assist in seeking this contract:

Baltazar Serna, Jr., attorney

*** 7) Disclosure of political contributions.**

List any campaign or officeholder contributions made by the following individuals in the past 24 months to any current member of City Council, former member of City Council, any candidate for City Council, or to any political action committee that contributes to City Council elections:

- a. any individual seeking contract with the city (Question 3)
- b. any owner or officer of entity seeking contract with the city (Question 3)
- c. any individual or owner or officer of an entity listed above as a partner, parent, or subsidiary business (Question 4)
- d. any subcontractor or owner/officer of subcontracting entity retained for the contract (Question 5)
- e. the spouse of any individual listed in response to (a) through (d) above
- f. any attorney, lobbyist, or consultant retained to assist in seeking contract (Question 6)

☐ Not applicable. No campaign or officeholder contributions have been made in preceding 24 months by these individuals.

If applicable, list below name of contributor; to whom; date; and amount:

Please see attached pages.

Updates on Contributions Required

Information regarding contributions must be updated by submission of a revised form from the date of the submission of this form, up through the time City Council takes action on the contract identified in response to Question 2 and continuing for 30 calendar days after the contract has been awarded.

Notice Regarding Contribution Prohibitions for "High-Profile" Contracts

Under Section 2-309 of the Municipal Campaign Finance Code, the following listed individuals are prohibited from making a campaign or officeholder contribution to any member of City Council, candidate for City Council or political action committee that contributes to City Council elections from the 10th business day after a contract solicitation has been released until 30 calendar days after the contract has been awarded:

- a. Any individual seeking a high-profile contract;
- b. Any owner, officer, officer of board, and executive committee member of an entity seeking a high-profile contract, excluding board officers and executive committee members of 501(c)(3), 501(c)(4) and 501(c)(6) non-profit organizations not created or controlled by the City whose board service is done strictly as a volunteer with no financial compensation and no economic gain from the non-profit entity;
- c. The legal signatory of the high-profile contract;
- d. Any attorney, lobbyist or consultant hired or retained to assist the individual or entity in seeking a high-profile contract;
- e. Subcontractors hired or retained to provide services under the high-profile contract; and
- f. Any first-degree member of the household of any person listed in (1), (2), (3) or (5) of this subsection.

Penalty. A high-profile contract cannot be awarded to the individual or entity if a prohibited contribution has been made by any of these individuals during the contribution "black-out" period, which is the 10th business day after a solicitation has been released until 30 calendar days after the contract has been awarded.

* 8) Disclosure of conflict of interest.

Are you aware of any fact(s) with regard to this contract that would raise a "conflict of interest" issue under Sections 2-43 or 2-44 of the City Ethics Code for any City Council member or board/commission member that has not or will not be raised by these city officials?

☒ I am not aware of any conflict(s) of interest issues under Section 2-43 or 2-44 of the City Ethics Code for members of City Council or a city board/commission.

If applicable, provide the conflict(s) of interest below:

* 9) Prohibited Interest in Contracts.

Currently, or within the past twelve (12) months, have you, your spouse, sibling, parent, child or other family member within the first degree of consanguinity or affinity served on a City board or commission?

☐ Yes ☒ No

Currently, or within the past twelve (12) months, has an owner, partner or employee of a business entity in which you, your spouse, parent, child own 10% or more of the voting stock or shares, or 10% or more of the fair market value served on a City board or commission?

☐ Yes ☒ No

Currently, or within the past twelve (12) months, has an owner, partner, or employee of a business entity who owns 10% or more of the voting stock or shares, or 10% or more of the fair market value, that will be a subcontractor for this contract, served on a City board or commission?

☐ Yes ☒ No



If you answered Yes to any questions in Question 9, please list the name of the individual, name of board/commission, and start/end date of service (for each instance).

Notice Regarding Prohibited Interest in Contracts.

Please be aware, the City's Charter and Ethics Code prohibits members of certain more-than-advisory boards and commissions, as well as their close family members and any businesses they or their families hold a 10% or greater ownership interest from obtaining a contract with the City during their board or commission service. The prohibition extends to subcontracts on City contracts, and would also apply to parent, subsidiary or partner businesses owned by the member of the board or commission and their family. Please see Section 141 of the City Charter and Section 2-52 of the City Ethics Code (Prohibited Interests in Contracts) for complete information.

Former members of certain more-than-advisory boards and commissions, their family members and the businesses they own will continue to be prohibited from obtaining any discretionary contracts for one year after leaving City service. Please see Section 2-58 of the City Ethics Code (Prohibited Interest in Discretionary Contracts) for complete information.

Please note that any contract in place at the time the applicant becomes a City officer may remain in effect, but cannot be amended, extended, modified, or changed in any manner during the officer's City service on the more-than-advisory board.

If you have any questions, please contact the Office of the City Attorney to request to speak with a member of the Ethics staff: (210) 207-8940

Acknowledgments

*1. Updates Required

- ☒ I understand that this form must be updated by submission of a revised form if there is any change in the information before the discretionary contract, housing and retail development incentive, or the purchase, sale, or lease of real estate to or from the City is the subject of action by the City Council, and no later than 5 business days after any change has occurred, whichever comes first. This includes information about political contributions made after the initial submission and up until 30 calendar days after contract has been awarded.

*2. No Contact with City Officials or Staff during Contract Evaluation

- ☒ I understand that a person or entity who seeks or applies for a city contract or any other person acting on behalf of that person or entity is prohibited from contacting city officials and employees regarding the contract after a Request for Proposal (RFP), Request for Qualification (RFQ), or other solicitation has been released.

This no-contact provision shall conclude when the contract is posted as a City Council agenda item. If contact is required with city officials or employees, the contact will take place in accordance with procedures incorporated into the solicitation documents. Violation of this prohibited contacts provision set out in Section 2-61 of the City Ethics Code by respondents or their agents may lead to disqualification of their offer from consideration.

***3. Contribution Prohibitions for "High-Profile" Contracts**

☐ This is not a high-profile contract.

If this is a high-profile contract please complete the following questions:

- ☒ I acknowledge that this contract has been designated as a high-profile contract by the city. I further acknowledge that the following individuals are prohibited from making campaign or officeholder contributions to members of City Council, candidates for City Council, or political action committees that make contributions to City Council elections from the 10th business day after the solicitation has been released until 30 calendar days after the contract has been awarded: legal signatory to contract individual(s) seeking the contract, owner or officer of an entity seeking the contract, the spouse of any of these individuals, and any attorney, lobbyist, or consultant retained to assist in seeking the contract.
- ☒ I warrant that no contributions have been made by these individuals in violation of Section 2-309 of the Municipal Campaign Finance Code.

***4. Conflicts of Interest Questionnaire (CIQ)**

Chapter 176 of the Local Government Code requires all contractors and vendors to submit a Conflict of Interest Questionnaire Form (CIQ) to the Office of the City Clerk, even if contract is not designated as "High Profile".

- ☒ I acknowledge that I have been advised of the requirement to file a CIQ form under Chapter 176 of the Local Government Code.

*** Oath**

- ☒ I swear or affirm that the statements contained in this Contracts Disclosure Form, including any attachments, to the best of my knowledge and belief are true, correct, and complete.

***Print Name:** Clifton F. Douglass III

***Signature:** 

Title: Managing Partner

***Date:** June 1, 2023

***Company Name or DBA:** Linebarger Goggan Blair & Sampson, LLP

This form can be completed online at www.sanantonio.gov/ethics.
If form cannot be completed online, please print, complete and submit with proposal. All questions must be answered.

If submitting via regular mail, send to:

Purchasing Department
P.O. Box 839966
San Antonio, Texas 78283-3966



» ***4) List any individual(s) or entity(ies) that is a partner, parent, joint venture, or subsidiary entity(ies) of the individual or entity listed in Question 3.**

Wholly Owned Subsidiaries

The law firm owns five divisions.

- > ITG Services, LLC, our in-house information technology and development division
- > PRC Services, LLC, a title servicing company
- > Appraisal & Collection Technologies, LLC, which develops and markets tax office current collection software
- > Linebarger Analytics & Information Services, LLC, our homestead exemption audit service
- > Linebarger Real Estate 2018, LLC, which manages the law firm's office properties

Joint Ventures

In 1999, Linebarger established an El Paso presence through a joint venture, Delgado Acosta Spencer Linebarger & Perez, LLP (DASLP). A minority-owned firm with 25 employees, DASLP has collected over \$270,000,000 in delinquent tax revenue for its El Paso clients. Its legal team brings over 100 years of combined experience in managing delinquent tax collections and in litigating property tax cases.

In 2021, a merger between Linebarger Goggan Blair & Sampson, LLP and The Law Office of Gary A. Grimes, PC resulted in the creation of Grimes & Linebarger, LLP, a joint venture partnership in which Linebarger Goggan Blair & Sampson, LLP holds the controlling interest.

» * 7) Disclosure of political contributions.

2023 Linebarger COSA RFP Campaign Donation Disclosures

Donations from Clifton and Beth Douglass

DATE	PAYEE	AMOUNT
11/10/21	Ron Nirenberg Campaign	\$1000
11/10/21	Melissa Cabello Havrda Campaign	\$500
4/28/22	Manny Pelaez Campaign	\$500
5/17/22	Phyllis Viagran Campaign	\$500
11/1/22	Melissa Cabello Havrda Campaign	\$500
11/17/22	Ron Nirenberg Campaign	\$1000
2/9/23	John Courage Campaign	\$500
3/8/23	Manny Pelaez Campaign	\$500
3/13/23	Jalen McKee Rodriguez Campaign	\$500
4/6/23	Manny Pelaez Campaign	\$500
4/6/23	Melissa Cabello Havrda Campaign	\$500
4/6/23	Dr. Adriana Rocha Garcia Campaign	\$500
4/6/23	Phyllis Viagran Campaign	\$500

Donations from Partner David Aelvoet

DATE	PAYEE	AMOUNT
11/10/21	Ron Nirenberg Campaign	\$1000
11/22/22	Ron Nirenberg Campaign	\$1000
4/6/23	Manny Pelaez Campaign	\$500
4/6/23	Melissa Cabello Havrda Campaign	\$500
4/6/23	Dr. Adriana Rocha Garcia Campaign	\$500
4/6/23	Phyllis Viagran Campaign	\$500

Linebarger Partners

DATE	DONOR NAME	PAYEE	AMOUNT
11/10/21	Paul Chapa	Ron Nirenberg Campaign	\$1000
11/10/21	Norman Nelson	Ron Nirenberg Campaign	\$1000
11/16/22	Norman Nelson	Ron Nirenberg Campaign	\$1000
11/17/22	Paul Chapa	Ron Nirenberg Campaign	\$1000
11/18/22	Ronald Rocha	Ron Nirenberg Campaign	\$500
11/18/22	Rick Haas	Ron Nirenberg Campaign	\$500
11/19/22	Chris Moehnke	Ron Nirenberg Campaign	\$500
11/22/22	Lilia Gibson	Ron Nirenberg Campaign	\$1000



» * 7) Disclosure of political contributions.

2023 Escamilla & Poneck COSA RFP Campaign Donation Disclosures

Escamilla & Poneck, LLP Political Contributions

July 2020	Ron Nirenberg	1,000	Pablo Escamilla
	Ron Nirenberg	1,000	Douglas Poneck
February 2021	Ron Nirenberg	1,000	Pablo Escamilla
	Ron Nirenberg	1,000	Douglas Poneck
March 2021	Adriana Garcia	500	Pablo Escamilla
April 2021	Ana Sandoval	500	Pablo Escamilla
	Tomas Uresti	500	Pablo Escamilla
May 2021	Roberto Trevino	500	Pablo Escamilla
	John Courage	500	Pablo Escamilla
	Rudy Lopez	500	Pablo Escamilla
	Jada Andrews-Sullivan	500	Pablo Escamilla
	Tomas Uresti	500	Pablo Escamilla
	Ron Nirenberg	1000	Douglas Poneck
	Ron Nirenberg	1000	Pablo Escamilla
June 2021	Mario Bravo	500	Pablo Escamilla
June 2022	Mario Bravo	500	Pablo Escamilla
November 2022	Ron Nirenberg	1,000	Pablo Escamilla
	Ron Nirenberg	1,000	Douglas Poneck
March 2023	Marina Gavito	500	Pablo Escamilla
	Marina Gavito	500	Douglas Poneck
April 2023	Melissa Havdra	500	Pablo Escamilla
	Phyllis Viagran	500	Pablo Escamilla

» * 7) Disclosure of political contributions.

2023 Baltazar R. Serna, Jr. COSA RFP Campaign Donation Disclosures

			Conbibtution
Baltazar Serna	Clayton Perry	12/07/2020	\$500.00
Baltazar Serna	Melissa Cabello Havrda	11/17/2020	\$300.00
Baltazar Serna	Melissa Cabello Havrda	11/17/2020	\$195.77
Baltazar Serna	Ronald Nirenberg	12/29/2020	\$1,000.00
Baltazar Serna	Ana Sandoval	12/21/2020	\$500.00
Walter Serna	Yes for Mobility PAC	10/30/2020	\$1,000.00
Baltazar Serna	Roberto Trevino	12/31/2020	\$500.00
Baltazar Serna	Ready to Work SA	10/30/2020	\$1,000.00
Walter Serna	Manuel Pelaez	10/29/2020	\$400.00
Walter Serna	Manuel Pelaez	10/29/2020	\$100.00
Baltazar Serna	Jada Andrews- Sullivan	03/15/2021	\$500.00
Baltazar Serna	Norberto Landin	03/12/2021	\$500.00
Baltazar Serna	Phyllis Viagran	02/04/2021	\$500.00
Debroah Jean Serna	Manuel Pelaez	03/29/2021	\$500.00
Baltazar Serna	Adriana Garcia	04/13/2021	\$500.00
Jessica Serna	Ronald Nirenberg	03/24/2021	\$100.00
Deborah Serna	Ronald Nirenberg	03/25/2021	\$500.00
Baltazar Serna	Roberto Trevino	05/14/2021	\$500.00
Baltazar Serna	Phyllis Viagran	06/01/2021	\$500.00
Deborah Jean Serna	Phyllis Viagran	06/01/2021	\$500.00
Baltazar Serna	Rudy Lopez	05/27/2021	\$500.00



City of San Antonio- Contractual Performance

Date	Name	Juris	Pol/Chari	Amount	Office Holds/Seeking
05/07/21	Ron Nirenberg Campaign	00001	Political	\$1,000	Mayor
05/07/21	John Courage Campaign	00001	Political	\$500	City Council Dist 9
05/07/21	Roberto Trevino Campaign	00001	Political	\$500	San Antonio City Council Runoff Races
05/11/21	Jada Andrews-Sullivan Campaign	00001	Political	\$500	City Council Dist 2
05/14/21	Rudy Lopez Campaign	00001	Political	\$500	City Council Dist 6
07/28/21	Jalen McKee-Rodriguez	00001	Political	\$500	City Council Dist 2
08/12/21	Clayton Perry Campaign	00001	Political	\$500	City Council Dist 10
08/24/21	Melissa Havrda Campaign	00001	Political	\$500	City Council Dist 6
09/22/21	Mario Bravo Campaign	00001	Political	\$500	City Council Dist 1
10/13/21	Manny Pelaez Campaign	00001	Political	\$500	City Council Dist 8
11/10/21	Phyllis Viagran Campaign	00001	Political	\$500	City Council Dist 3
03/21/22	Build SA PAC	00001	Political	\$5,000	
04/14/22	Melissa Cabello Havrda Campaign	00001	Political	\$500	City Council Dist 6
04/27/22	Build SA PAC	00001	Political	\$5,000	
09/15/22	The Future is Now, PAC	00001	Political	\$5,000	
10/20/22	Melissa Havrda Campaign	00001	Political	\$500	City Council Dist 6
10/20/22	Ron Nirenberg Campaign	00001	Political	\$1,000	Mayor
12/22/22	Mario Bravo Campaign	00001	Political	\$500	City Council Dist 1
02/09/23	John Courage Campaign	00001	Political	\$500	City Council Dist 9
02/17/23	Manny Pelaez Campaign	00001	Political	\$500	City Council Dist 8
02/22/23	Teri Castillo Campaign	00001	Political	\$500	City Councilwoman
3/1/2023	Marc Whyte Campaign	00001	Political	\$500	Candidate for City Council Dist 10
4/3/2023	Phyllis Viagran Campaign	00001	Political	\$500	City Council Pct 3 - From In-House ck tracking
4/4/2023	Marina Alderete Gavito Campaign	00001	Political	\$500	City Council Dist 7 - From In-House ck tracking
4/4/2023	Dr. Adriana Rocha Garcia Campaign	00001	Political	\$500	City Council Dist 4 - From In-House ck tracking
4/4/2023	Jalen McKee-Rodriguez Campaign	00001	Political	\$500	City Council Dist 2 - From In-House ck tracking
				\$27,500	