

July 17, 2024

Clerk of the Board

2024 Local Agency Biennial Notice

Name of Agency: Fillmore Unified School District
Mailing Address: 425 Orchard Street, Fillmore, CA 93015
Contact Person: Irma Mendez Phone No. 805-524-6038
Email: imendez@fillmoreusd.org Alternate Email: _____

Accurate disclosure is essential to monitor whether officials have conflicts of interest and to help ensure public trust in government. The biennial review examines current programs to ensure that the agency's code includes disclosure by those agency officials who make or participate in making governmental decisions.

This agency has reviewed its conflict of interest code and has determined that (check one BOX):

☒ **An amendment is required. The following amendments are necessary:**

(Check all that apply.)

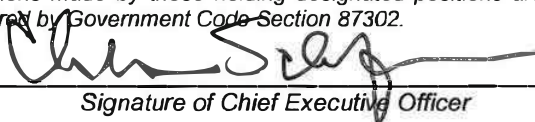
- ☒ Include new positions
☐ Revise disclosure categories
☐ Revise the titles of existing positions
☒ Delete titles of positions that have been abolished and/or positions that no longer make or participate in making governmental decisions
☐ Other (describe) _____

☐ **The code is currently under review by the code reviewing body.**

☐ **No amendment is required.** (If your code is over five years old, amendments may be necessary.)

Verification (to be completed if no amendment is required)

This agency's code accurately designates all positions that make or participate in the making of governmental decisions. The disclosure assigned to those positions accurately requires that all investments, business positions, interests in real property, and sources of income that may foreseeably be affected materially by the decisions made by those holding designated positions are reported. The code includes all other provisions required by Government Code Section 87302.



Signature of Chief Executive Officer

July 16, 2024

Date

All agencies must complete and return this notice regardless of how recently your code was approved or amended. Please return this notice no later than **October 1, 2024**, or by the date specified by your agency, if earlier, to: **E-Mail to: form700clerk@ventura.org**

or
**Mail to: Clerk of the Board of Supervisors
800 S. Victoria Avenue, L# 1920
Ventura, CA 93009-1920**

PLEASE DO NOT RETURN THIS FORM TO THE FPPC.

www.fppc.ca.gov
FPPC Advice: advice@fppc.ca.gov (866.275.3772)
Page 1 of 1

Redlined
Conflict of Interest Code

OCT 20 2022

Clerk of the Board

**CONFLICT OF INTEREST CODE
FILLMORE UNIFIED SCHOOL DISTRICT**

The Political Reform Act, Government Code section 81000 et seq., requires local government agencies to adopt and promulgate Conflict of Interest Codes. The Fair Political Practices Commission has adopted a regulation (2 Cal. Code Regs., § 18730) which contains the terms of a standard Conflict of Interest Code, which may be amended by the Fair Political Practices Commission to conform to amendments in the Political Reform Act after public notice and hearings.

The terms of California Code of Regulations, Title 2, Section 18730, and any amendment to it duly adopted by the Fair Political Practices Commission, are hereby incorporated by reference as the Conflict of Interest Code for the **FILLMORE UNIFIED SCHOOL DISTRICT**, and along with the attached Exhibit A, which designates positions requiring disclosure and Exhibit B, which sets forth disclosure categories for each designated position, constitute the Conflict of Interest Code of the **FILLMORE UNIFIED SCHOOL DISTRICT**. Persons holding positions designated in Exhibit A shall file Form 700 Statements of Economic Interests with the Filing Officer specified for that position in Exhibit A.

IN PREPARING THE FORM 700, DESIGNATED FILERS NEED ONLY DISCLOSE THOSE FINANCIAL INTERESTS FALLING WITHIN THE DISCLOSURE CATEGORIES DESIGNATED FOR THAT FILER'S POSITION AS STATED IN EXHIBITS A AND B.

APPROVED AND ADOPTED this 18th day of October 2022:

By: 
Olivia Palacio
Clerk, Governing Board, Fillmore USD

EXHIBIT A – DESIGNATED POSITIONS AND FILING OFFICERS

# of POSITIONS	POSITION TITLE	DISCLOSURE CATEGORIES (From Exhibit B)	FILING OFFICER (Designate County Clerk of Board [COB] or Local Agency's Clerk [AC])
5	Members of the Governing Board	1	COB
1	Superintendent of Schools	1	COB
1	Assistant Superintendent of Business Services	1	COB
1	Assistant Superintendent of Educational Services	1	COB
1	Assistant Superintendent of Human Resources and Student Services	1	COB
7	Principals	4,6	COB
1	Director of Child Development	4,6	COB
1	Director of Child Nutrition	4,6	COB
1	Director of Curriculum, Assessment and Instruction	4,6	COB
1	Director of Expanded Learning Programs	4,6	COB
1	Director of Expanded Learning, Multilingual Learners and Quality Programs	4,6	COB
1	Director of Fiscal Services	4,6	COB
1	Director of Human Resources	4,6	COB
1	Director of Maintenance, Operations, Transportation	4,6	COB
1	Director of Special Education	4,6	COB
1	Director of Special Projects and Student Services	4,6	COB
1	Director of Technology	4,6	COB
1	Bond/Facilities Project Manager	3,4,6	COB
1	Child Nutrition Services Manager	4,6	COB
1	Maintenance Manager	4,6	COB
1	Manager of Technology	4,6	COB
1	Purchasing Manager (Business Office)	4,6	COB
1	Transportation Manager	4,6	COB
Consultants ¹			

¹ The disclosure, if any, required of a consultant will be determined on a case-by-case basis by the head of the agency or designee. The determination of whether a consultant has disclosure requirements should be made in writing on a Fair Political Practices Commission Form 805. The determination should include a description of the consultant's duties and based upon that description, a statement of the extent, if any, of the disclosure requirements. Each Form 805 is a public record and

**RESOLUTION ADOPTING A
CONFLICT OF INTEREST CODE**

WHEREAS, the Political Reform Act, Government Code 87300-87313, requires each public agency in California to adopt a conflict of interest code; and

WHEREAS, the Governing Board of the Fillmore Unified School District has previously adopted a local conflict of interest code; and

WHEREAS, past and future amendments to the Political Reform Act and implementing regulations may require conforming amendments to be made to the district's conflict of interest code; and

WHEREAS, a regulation adopted by the Fair Political Practices Commission, 2 CCR 18730, provides that incorporation by reference of the terms of that regulation, along with an agency-specific appendix designating positions and disclosure categories shall constitute the adoption and amendment of a conflict of interest code in conformance with Government Code 87300 and 87306; and

WHEREAS, the Fillmore Unified School District has recently reviewed its positions, and the duties of each position, and has determined that changes to the current conflict of interest code are necessary; and


WHEREAS, any earlier resolutions, bylaws, and/or appendices containing the district's conflict of interest code shall be rescinded and superseded by this resolution and Appendix; and

NOW THEREFORE BE IT RESOLVED that the Fillmore Unified School District Governing Board adopts the following Conflict of Interest Code including its Appendix of Designated Employees and Disclosure Categories.

PASSED AND ADOPTED this 18th day of October 2022 at a meeting by the following vote:

AYES: 4
NOES: 0
ABSENT: 1

Attest:



Tricia Gradias, President, Governing Board
Fillmore Unified School District

CONFLICT OF INTEREST CODE OF THE FILLMORE UNIFIED SCHOOL DISTRICT

The provisions of 2 CCR 18730 and any amendments to it adopted by the Fair Political Practices Commission, together with the attached Appendix specifying designated positions and disclosure categories, are incorporated by reference and shall constitute the district's conflict of interest code.

Governing Board members and designated employees shall file a Statement of Economic Interest/Form 700 in accordance with the disclosure categories listed in the attached Appendix. The Statement of Economic Interest shall be filed with the district's filing officer and/or, if so required, with the district's code reviewing body. The district's filing officer shall make the statements available for public review and inspection.

APPENDIX

Disclosure Categories

The terms *italicized* below have specific meaning under the Political Reform Act. In addition, the financial interests of a spouse, domestic partner and dependent children of the public official holding the designated position may require reporting. Consult the instructions and reference pamphlet of the Form 700 for explanation.

Category 1 – BROADEST DISCLOSURE

[SEE FORM 700 SCHEDULES A-1, A-2, B, C, D and E]

- (1) All sources of *income, gifts, loans and travel payments*;
- (2) All *interests in real property*; and
- (3) All *investments and business positions in business entities*.

Category 2 – REAL PROPERTY

[SEE FORM 700 SCHEDULE B]

All *interests in real property*, including *interests in real property* held by *business entities* and trusts in which the public official holds a business position or has an *investment* or other financial interest.

Category 3 – LAND DEVELOPMENT, CONSTRUCTION AND TRANSACTION

[SEE FORM 700 SCHEDULES A-1, A-2, C, D and E]

All *investments, business positions* and sources of *income, gifts, loans and travel payments*, from sources which engage in land development, construction, or real property acquisition or sale.

Category 4 – PROCUREMENT

[SEE FORM 700 SCHEDULES A-1, A-2, C, D and E]

All *investments, business positions* and sources of *income, gifts, loans and travel payments*, from sources which provide services, supplies, materials, machinery or equipment which the designated position procures or assists in procuring on behalf of their agency or department.

Category 5 – REGULATION AND PERMITTING

[SEE FORM 700 SCHEDULES A-1, A-2, C, D and E]

All *investments, business positions* and sources of *income, gifts, loans* and *travel payments*, from sources which are subject to the regulatory, permitting or licensing authority of, or have an application or license pending before, the designated position's agency or department.

Category 6 – FUNDING

[SEE FORM 700 SCHEDULES A-1, A-2, C, D and E]

All *investments, business positions* and sources of *income, gifts, loans* and *travel payments*, from sources which receive grants or other funding from or through the designated position's agency or department.

DESIGNATED POSITIONS AND FILING OFFICERS

Based on the foregoing, the following agency positions and/or consultants qualify as "other officials who manage public investments" and shall file Statements of Economic Interests (Form 700) pursuant to Government Code section 87200 et seq. with the below-designated Filing Officers:

Designated Positions Titles/Consultants	Disclosure Category	<u>Filing Officer</u> (Designate County Clerk of Board [COB] or Local Agency's Clerk [AC])
Members of the Governing Board	1	COB
Superintendent of Schools	1	COB
Assistant Superintendent of Business Services	1	COB
Assistant Superintendent of Educational Services	1	COB
Principals	4,6	COB
Director of Child Development	4,6	COB
Director of Child Nutrition	4,6	COB
Director of Curriculum, Assessment and Instruction	4,6	COB
Director of Expanded Learning Programs	4,6	COB
Director of Fiscal Services	4,6	COB
Director of Human Resources	4,6	COB
Director of Maintenance, Operations, Transportation	4,6	COB
Director of Special Education	4,6	COB
Director of Special Projects and Student Services	4,6	COB
Director of Technology	4,6	COB
Bond/Facilities Project Manager	3,4,6	COB
Child Nutrition Services Manager	4,6	COB
Maintenance Manager	4,6	COB
Manager of Technology	4,6	COB
Purchasing Manager (Business Office)	4,6	COB

Disclosures for Consultants

Consultants are designated employees who must disclose financial interests as determined on a case-by-case basis by the Superintendent or designee. The Superintendent or designee's written determination shall include a description of the consultant's duties and a statement of the extent of disclosure requirements based upon that description. All such determinations are public records and shall be retained for public inspection along with this conflict of interest code.

A consultant is an individual who, pursuant to a contract with the district, makes a governmental decision whether to: (2 CCR 18700.3)

1. Approve a rate, rule, or regulation
2. Adopt or enforce a law
3. Issue, deny, suspend, or revoke any permit, license, application, certificate, approval, order, or similar authorization or entitlement
4. Authorize the district to enter into, modify, or renew a contract that requires district approval
5. Grant district approval to a contract that requires district approval and in which the district is a party, or to the specifications for such a contract
6. Grant district approval to a plan, design, report, study, or similar item
7. Adopt or grant district approval of district policies, standards, or guidelines

A consultant is also an individual who, pursuant to a contract with the district, serves in a staff capacity with the district and in that capacity participates in making a governmental decision as defined in 2 CCR 18704, subsections (a) and (b), or performs the same or substantially all the same duties for the district that would otherwise be performed by an individual holding a position specified in the district's conflict of interest code. (2 CCR 18700.3)

EXHIBIT B – DISCLOSURE CATEGORIES

The terms *italicized* below have specific meaning under the Political Reform Act. In addition, the financial interests of a spouse, domestic partner and dependent children of the public official holding the designated position may require reporting. Consult the instructions and reference pamphlet of the Form 700 for explanation.

Category 1 – BROADEST DISCLOSURE

[SEE FORM 700 SCHEDULES A-1, A-2, B, C, D and E]

- (1) All sources of *income, gifts, loans* and *travel payments*;
- (2) All *interests in real property*; and
- (3) All *investments* and *business positions* in *business entities*.

Category 2 – REAL PROPERTY

[SEE FORM 700 SCHEDULE B]

All interests in real property, including interests in real property held by business entities and trusts in which the public official holds a business position or has an investment or other financial interest.

Category 3 – LAND DEVELOPMENT, CONSTRUCTION AND TRANSACTION

[SEE FORM 700 SCHEDULES A-1, A-2, C, D and E]

All investments, business positions and sources of income, gifts, loans and travel payments, from sources which engage in land development, construction, or real property acquisition or sale.

Category 4 – PROCUREMENT

[SEE FORM 700 SCHEDULES A-1, A-2, C, D and E]

All investments, business positions and sources of income, gifts, loans and travel payments, from sources which provide services, supplies, materials, machinery or equipment which the designated position procures or assists in procuring on behalf of their agency or department.

Category 5 – REGULATION AND PERMITTING

[SEE FORM 700 SCHEDULES A-1, A-2, C, D and E]

All investments, business positions and sources of income, gifts, loans and travel payments, from sources which are subject to the regulatory, permitting or licensing authority of, or have an application or license pending before, the designated position's agency or department.

Category 6 – FUNDING

[SEE FORM 700 SCHEDULES A-1, A-2, C, D and E]

All investments, business positions and sources of income, gifts, loans and travel payments, from sources which receive grants or other funding from or through the designated position's agency or department.

APPENDIX - DESIGNATING OFFICIALS WHO MANAGE PUBLIC INVESTMENTS

Pursuant to Government Code section 87200 et seq., certain city and county officials, as well as all "other officials who manage public investments," are required to disclose their economic interests in accordance with the Political Reform Act. This Appendix provides the relevant definitions for determining which public officials qualify as "other officials who manage public investments," designates the agency's positions which qualify as such, and states the Filing Officer for each designated position.

APPLICABLE DEFINITIONS

As set forth in 2 California Code of Regulations section 18701, the following definitions apply for the purposes of Government Code section 87200:

(1) "Other public officials who manage public investments" means:

(A) Members of boards and commissions, including pension and retirement boards or commissions, or of committees thereof, who exercise responsibility for the management of public investments;

(B) High-level officers and employees of public agencies who exercise primary responsibility for the management of public investments, such as chief or principal investment officers or chief financial managers. This category shall not include officers and employees who work under the supervision of the chief or principal investment officers or the chief financial managers; and

(C) Individuals who, pursuant to a contract with a state or local government agency, perform the same or substantially all the same functions that would otherwise be performed by the public officials described in subdivision (1)(B) above.

(2) "Public investments" means the investment of public moneys in real estate, securities, or other economic interests for the production of revenue or other financial return.

(3) "Public moneys" means all moneys belonging to, received by, or held by, the state, or any city, county, town, district, or public agency therein, or by an officer thereof acting in his or her official capacity, and includes the proceeds of all bonds and other evidences of indebtedness, trust funds held by public pension and retirement systems, deferred compensation funds held for investment by public agencies, and public moneys held by a financial institution under a trust indenture to which a public agency is a party.

(4) "Management of public investments" means the following non-ministerial functions: directing the investment of public moneys; formulating or approving investment policies; approving or establishing guidelines for asset allocations; or approving investment transactions.

DESIGNATED POSITIONS AND FILING OFFICERS

Based on the foregoing, the following agency positions and/or consultants qualify as “other officials who manage public investments” and shall file Statements of Economic Interests (Form 700) pursuant to Government Code section 87200 et seq. with the below-designated Filing Officers:

# of POSITIONS	POSITION TITLE/CONSULTANT	FILING OFFICER (Designate County Clerk of Board [COB] or Local Agency’s Clerk [AC])

June 17, 2024

Agency Report of:
New Positions

Clerk of the Board

A Public Document

California
Form

804

1. Agency Name (Also include, Division, Department, or Region (if applicable))

Fillmore Unified School District

Agency Contact

Christine Schieferle, Superintendent

Phone Number

805-524-6038

Email

christine.schieferle@fillmoreusd.org.

☐ Amendment

Date of Original Filing: _____

(month, day, year)

2. New Position Information

Position Title/Classification and Job Summary	Assigned Category	OR	Disclosure Requirement	Assuming/Start Date (Optional)
Assistant Superintendent of Human Resources and Student Services	Category 1 - Broadest Disclosure			Start <u>07</u> / <u>01</u> / <u>24</u> m / d / yr
Director of Expanded Learning, Multilingual Learners and Quality Programs	Categories 4 and 6			Start <u>07</u> / <u>01</u> / <u>24</u> m / d / yr
				Start ____/____/____ m / d / yr
				Start ____/____/____ m / d / yr
				Start ____/____/____ m / d / yr
				Start ____/____/____ m / d / yr
				Start ____/____/____ m / d / yr
				Start ____/____/____ m / d / yr

3. Verification

I have read and understand FPPC Regulations 18700.3 and 18734. I have verified that the disclosure assignment(s) set forth above, is in accordance with its provisions.


Signature

Christine Schieferle

Name

Superintendent

Title

06/13/2024

(month, day, year)

Comment: (Use this space or an attachment for any additional information.)

Print

Clear

**Amended
Conflict of Interest Code**

CONFLICT OF INTEREST CODE
FILLMORE UNIFIED SCHOOL DISTRICT

The Political Reform Act, Government Code section 81000 et seq., requires local government agencies to adopt and promulgate Conflict of Interest Codes. The Fair Political Practices Commission has adopted a regulation (2 Cal. Code Regs., § 18730) which contains the terms of a standard Conflict of Interest Code, which may be amended by the Fair Political Practices Commission to conform to amendments in the Political Reform Act after public notice and hearings.

The terms of California Code of Regulations, Title 2, Section 18730, and any amendment to it duly adopted by the Fair Political Practices Commission, are hereby incorporated by reference as the Conflict of Interest Code for the ***FILLMORE UNIFIED SCHOOL DISTRICT***, and along with the attached Exhibit A, which designates positions requiring disclosure and Exhibit B, which sets forth disclosure categories for each designated position, constitute the Conflict of Interest Code of the ***FILLMORE UNIFIED SCHOOL DISTRICT***. Persons holding positions designated in Exhibit A shall file Form 700 Statements of Economic Interests with the Filing Officer specified for that position in Exhibit A.

IN PREPARING THE FORM 700, DESIGNATED FILERS NEED ONLY DISCLOSE THOSE FINANCIAL INTERESTS FALLING WITHIN THE DISCLOSURE CATEGORIES DESIGNATED FOR THAT FILER'S POSITION AS STATED IN EXHIBITS A AND B.

APPROVED AND ADOPTED this 16th day of July 2024:

By: 
Print Name: Lucy Rangel
Clerk, Governing Board, Fillmore USD

EXHIBIT A – DESIGNATED POSITIONS AND FILING OFFICERS

# of POSITIONS	POSITION TITLE	DISCLOSURE CATEGORIES (From Exhibit B)	FILING OFFICER (Designate County Clerk of Board [COB] or Local Agency's Clerk [AC])
5	Members of the Governing Board	1	COB
1	Superintendent of Schools	1	COB
1	Assistant Superintendent of Business Services	1	COB
1	Assistant Superintendent of Educational Services	1	COB
1	Assistant Superintendent of Human Resources and Student Services	1	COB
7	Principals	4,6	COB
1	Director of Child Development	4,6	COB
1	Director of Child Nutrition	4,6	COB
1	Director of Curriculum, Assessment and Instruction	4,6	COB
1	Director of Expanded Learning, Multilingual Learners and Quality Programs	4, 6	COB
1	Director of Fiscal Services	4,6	COB
1	Director of Human Resources	4,6	COB
1	Director of Maintenance, Operations, Transportation	4,6	COB
1	Director of Special Education	4,6	COB
1	Director of Technology	4,6	COB
1	Bond/Facilities Project Manager	3,4,6	COB
1	Child Nutrition Services Manager	4,6	COB
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Consultants ¹			

¹ The disclosure, if any, required of a consultant will be determined on a case-by-case basis by the head of the agency or designee. The determination of whether a consultant has disclosure requirements should be made in writing on a Fair Political Practices Commission Form 805. The determination should include a description of the consultant's duties and based upon that description, a statement of the extent, if any, of the disclosure requirements. Each Form 805 is a public record and should be retained for public inspection either in the same manner and location as the Conflict-of-Interest Code, or with appropriate documentation at the location where the Conflict of Interest Code is maintained, cross-referencing to the Form 805.

EXHIBIT B – DISCLOSURE CATEGORIES

The terms *italicized* below have specific meaning under the Political Reform Act. In addition, the financial interests of a spouse, domestic partner and dependent children of the public official holding the designated position may require reporting. Consult the instructions and reference pamphlet of the Form 700 for explanation.

Category 1 – BROADEST DISCLOSURE

[SEE FORM 700 SCHEDULES A-1, A-2, B, C, D and E]

- (1) All sources of *income, gifts, loans and travel payments*;
- (2) All *interests in real property*; and
- (3) All *investments and business positions in business entities*.

Category 2 – REAL PROPERTY

[SEE FORM 700 SCHEDULE B]

All interests in real property, including interests in real property held by business entities and trusts in which the public official holds a business position or has an investment or other financial interest.

Category 3 – LAND DEVELOPMENT, CONSTRUCTION AND TRANSACTION

[SEE FORM 700 SCHEDULES A-1, A-2, C, D and E]

All investments, business positions and sources of income, gifts, loans and travel payments, from sources which engage in land development, construction, or real property acquisition or sale.

Category 4 – PROCUREMENT

[SEE FORM 700 SCHEDULES A-1, A-2, C, D and E]

All investments, business positions and sources of income, gifts, loans and travel payments, from sources which provide services, supplies, materials, machinery or equipment which the designated position procures or assists in procuring on behalf of their agency or department.

Category 5 – REGULATION AND PERMITTING

[SEE FORM 700 SCHEDULES A-1, A-2, C, D and E]

All investments, business positions and sources of income, gifts, loans and travel payments, from sources which are subject to the regulatory, permitting or licensing authority of, or have an application or license pending before, the designated position's agency or department.

Category 6 – FUNDING

[SEE FORM 700 SCHEDULES A-1, A-2, C, D and E]

All investments, business positions and sources of income, gifts, loans and travel payments, from sources which receive grants or other funding from or through the designated position's agency or department.

APPENDIX - DESIGNATING OFFICIALS WHO MANAGE PUBLIC INVESTMENTS

Pursuant to Government Code section 87200 et seq., certain city and county officials, as well as all “other officials who manage public investments,” are required to disclose their economic interests in accordance with the Political Reform Act. This Appendix provides the relevant definitions for determining which public officials qualify as “other officials who manage public investments,” designates the agency’s positions which qualify as such, and states the Filing Officer for each designated position.

APPLICABLE DEFINITIONS

As set forth in 2 California Code of Regulations section 18701, the following definitions apply for the purposes of Government Code section 87200:

(1) “Other public officials who manage public investments” means:

(A) Members of boards and commissions, including pension and retirement boards or commissions, or of committees thereof, who exercise responsibility for the management of public investments;

(B) High-level officers and employees of public agencies who exercise primary responsibility for the management of public investments, such as chief or principal investment officers or chief financial managers. This category shall not include officers and employees who work under the supervision of the chief or principal investment officers or the chief financial managers; and

(C) Individuals who, pursuant to a contract with a state or local government agency, perform the same or substantially all the same functions that would otherwise be performed by the public officials described in subdivision (1)(B) above.

(2) “Public investments” means the investment of public moneys in real estate, securities, or other economic interests for the production of revenue or other financial return.

(3) “Public moneys” means all moneys belonging to, received by, or held by, the state, or any city, county, town, district, or public agency therein, or by an officer thereof acting in his or her official capacity, and includes the proceeds of all bonds and other evidences of indebtedness, trust funds held by public pension and retirement systems, deferred compensation funds held for investment by public agencies, and public moneys held by a financial institution under a trust indenture to which a public agency is a party.

(4) “Management of public investments” means the following non-ministerial functions: directing the investment of public moneys; formulating or approving investment policies; approving or establishing guidelines for asset allocations; or approving investment transactions.

DESIGNATED POSITIONS AND FILING OFFICERS

Based on the foregoing, the following agency positions and/or consultants qualify as “other officials who manage public investments” and shall file Statements of Economic Interests (Form 700) pursuant to Government Code section 87200 et seq. with the below-designated Filing Officers:

# of POSITIONS	POSITION TITLE/CONSULTANT	FILING OFFICER (Designate County Clerk of Board [COB] or Local Agency’s Clerk [AC])
		COB

Exhibit 9270-E(1): Conflict Of Interest

Status: DRAFT

Original Adopted Date: Pending

**RESOLUTION ADOPTING A
CONFLICT OF INTEREST CODE**

WHEREAS, the Political Reform Act, Government Code 87300-87313, requires each public agency in California to adopt a conflict of interest code; and

WHEREAS, the Governing Board of the Fillmore Unified School District has previously adopted a local conflict of interest code; and

WHEREAS, past and future amendments to the Political Reform Act and implementing regulations may require conforming amendments to be made to the district's conflict of interest code; and

WHEREAS, a regulation adopted by the Fair Political Practices Commission, 2 CCR 18730, provides that incorporation by reference of the terms of that regulation, along with an agency-specific appendix designating positions and disclosure categories shall constitute the adoption and amendment of a conflict of interest code in conformance with Government Code 87300 and 87306; and

WHEREAS, the Fillmore Unified School District has recently reviewed its positions and the duties of each position and has determined that changes to the current conflict of interest code are necessary; and

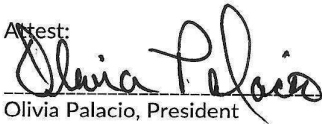
WHEREAS, any earlier resolutions, bylaws, and/or appendices containing the district's conflict of interest code shall be rescinded and superseded by this resolution and Appendix; and

NOW THEREFORE BE IT RESOLVED that the Fillmore Unified School District Governing Board adopts the following Conflict of Interest Code including its Appendix of Designated Employees and Disclosure Categories.

PASSED AND ADOPTED this 16th day of July 2024 at a meeting by the following vote:

AYES: Scott Beylik, Tricia Gradias, Sean Morris, Olivia Palacio, Lucy Rangel
NOES: 0
ABSENT: 0

Attest:



Olivia Palacio, President
Governing Board

CONFLICT OF INTEREST CODE OF THE FILLMORE UNIFIED SCHOOL DISTRICT

The provisions of 2 CCR 18730 and any amendments to it adopted by the Fair Political Practices Commission, together with the attached Appendix specifying designated positions and disclosure categories, are incorporated by reference and shall constitute the district's conflict of interest code.

Governing Board members and designated employees shall file a Statement of Economic Interest/Form 700 in accordance with the disclosure categories listed in the attached Appendix. The Statement of Economic Interest shall be filed with the district's filing officer and/or, if so required, with the district's code reviewing body. The district's filing officer shall make the statements available for public review and inspection.

APPENDIX

Disclosure Categories

The terms *italicized* below have specific meaning under the Political Reform Act. In addition, the financial interests of a spouse, domestic partner and dependent children of the public official holding the designated position may require reporting. Consult the instructions and reference pamphlet of the Form 700 for explanation.

Category 1 – BROADEST DISCLOSURE

[See Form 700 Schedules A-1, A-2, B, C, D and E]

- (1) All sources of *income, gifts, loans and travel payments*;
- (2) All *interests in real property*; and
- (3) All *investments and business positions in business entities*.

Category 2 – REAL PROPERTY

[See Form 700 Schedule B]

All *interests in real property*, including *interests in real property* held by *business entities* and trusts in which the public official holds a business position or has an *investment* or other financial interest.

Category 3 – LAND DEVELOPMENT, CONSTRUCTION AND TRANSACTION

[See Form 700 Schedules A-1, A-2, C, D and E]

All *investments, business positions* and sources of *income, gifts, loans and travel payments*, from sources which engage in land development, construction, or real property acquisition or sale.

Category 4 – PROCUREMENT

[See Form 700 Schedules A-1, A-2, C, D and E]

All *investments, business positions* and sources of *income, gifts, loans and travel payments*, from sources which provide services, supplies, materials, machinery or equipment which the designated position procures or assists in procuring on behalf of their agency or department.

Category 5 – REGULATION AND PERMITTING

[See Form 700 Schedules A-1, A-2, C, D and E]

All *investments, business positions* and sources of *income, gifts, loans and travel payments*, from sources which are subject to the regulatory, permitting or licensing authority of, or have an application or license pending before, the designated position's agency or department.

Category 6 – FUNDING

[See Form 700 Schedules A-1, A-2, C, D and E]

All *investments, business positions* and sources of *income, gifts, loans and travel payments*, from sources which receive grants or other funding from or through the designated position's agency or department.

Designated Positions

POSITION	DISCLOSURE CATEGORIES
Members of the Governing Board	1
Superintendent of Schools	1
Assistant Superintendent of Business Services	1
Assistant Superintendent of Educational Services	1
Assistant Superintendent of Human Resources and Student Services	1
Principals	4, 6
Director of Child Development	4, 6
Director of Child Nutrition	4, 6
Director of Curriculum, Assessment and Instruction	4, 6
Director of Expanded Learning, Multilingual Learners and Quality Programs	4, 6
Director of Fiscal Services	4, 6
Director of Human Resources	4, 6
Director of Maintenance, Operations, Transportation	4, 6
Director of Special Education	4, 6
Director of Technology	4, 6

Bond/Facilities Project Manager	3, 4, 6
Child Nutrition Services Manager	4, 6
Maintenance Manager	4, 6
Manager of Technology	4, 6
Transportation Manager	4, 6
Consultants ^[1]	

^[1] The disclosure, if any, required of a consultant will be determined on a case-by-case basis by the head of the agency or designee. The determination of whether a consultant has disclosure requirements should be made in writing on a Fair Political Practices Commission Form 805. The determination should include a description of the consultant's duties and based upon that description, a statement of the extent, if any, of the disclosure requirements. Each Form 805 is a public record and should be retained for public inspection either in the same manner and location as the Conflict of Interest Code or with appropriate documentation at the location where the Conflict of Interest Code is maintained, cross-referencing to the Form 805.

Disclosures for Consultants

Consultants are designated employees who must disclose financial interests as determined on a case-by-case basis by the Superintendent or designee. The Superintendent or designee's written determination shall include a description of the consultant's duties and a statement of the extent of disclosure requirements based upon that description. All such determinations are public records and shall be retained for public inspection along with this conflict of interest code.

A consultant is an individual who, pursuant to a contract with the district, makes a governmental decision whether to: (2 CCR 18700.3)

1. Approve a rate, rule, or regulation
2. Adopt or enforce a law
3. Issue, deny, suspend, or revoke any permit, license, application, certificate, approval, order, or similar authorization or entitlement
4. Authorize the district to enter into, modify, or renew a contract that requires district approval
5. Grant district approval to a contract that requires district approval and in which the district is a party, or to the specifications for such a contract
6. Grant district approval to a plan, design, report, study, or similar item
7. Adopt or grant district approval of district policies, standards, or guidelines

A consultant is also an individual who, pursuant to a contract with the district, serves in a staff capacity with the district and in that capacity participates in making a governmental decision as defined in 2 CCR 18704, subsections (a) and (b), or performs the same or substantially all the same duties for the district that would otherwise be performed by an individual holding a position specified in the district's conflict of interest code. (2 CCR 18700.3)

Policy Reference Disclaimer: These references are not intended to be part of the policy itself, nor do they indicate the basis or authority for the board to enact this policy. Instead, they are provided as additional resources for those interested in the subject matter of the policy.

State References

2 CCR 18110-18997
2 CCR 18438.1-18438.8
2 CCR 18700-18760
2 CCR 18722-18740
2 CCR 18753-18756
Ed. Code 1006

Description

Regulations of the Fair Political Practices Commission
Campaign contribution-based conflicts of interest
Conflicts of Interest
Disclosure of interests
Conflict of interest codes
[Prohibition against school district employees serving on county board of education](#)

State References

Ed. Code 35107
 Ed. Code 35230-35240
 Ed. Code 35233
 Ed. Code 41000-41003
 Ed. Code 41015
 Fam. Code 297.5
 Gov. Code 1090-1099
 Gov. Code 1125-1129
 Gov. Code 53234-53235.2
 Gov. Code 81000-91014
 Gov. Code 82011
 Gov. Code 82019
 Gov. Code 82028
 Gov. Code 82030
 Gov. Code 82033
 Gov. Code 82034
 Gov. Code 84308
 Gov. Code 87100-87103.6
 Gov. Code 87200-87210
 Gov. Code 87300-87313
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 Gov. Code 89501-89503
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 Pub. Cont. Code 6102
 Rev. & Tax Code 203

Management Resources References

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[School district employees](#)
[Corrupt practices](#)
[Prohibitions applicable to members of governing boards](#)
[Moneys received by school districts](#)
[Investments](#)
[Rights, protections, and benefits of registered domestic partners](#)
[Prohibitions applicable to specified officers](#)
[Incompatible activities](#)
[Ethics training](#)
[Political Reform Act](#)
[Code reviewing body](#)
[Definition: designated employee](#)
[Definition: gift](#)
[Definition: income](#)
[Definition: interest in real property](#)
[Definition: investment](#)
[Campaign Disclosure](#)
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[Disclosure](#)
[Conflict of interest code](#)
[Statement of economic interests](#)
[Honoraria and gifts](#)
[Ethics; travel](#)
[Enforcement](#)
[Bribes](#)
[Bribery of public official; voidable contract](#)
[Taxable and exempt property - colleges](#)

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105 Ops.Cal.Atty.Gen.69 (2022)
 63 Ops.Cal.Atty.Gen. 868 (1980)
 65 Ops.Cal.Atty.Gen. 606 (1982)
 68 Ops.Cal.Atty.Gen. 171 (1985)
 69 Ops.Cal.Atty.Gen. 255 (1986)
 80 Ops.Cal.Atty.Gen. 320 (1997)
 81 Ops.Cal.Atty.Gen. 327 (1998)
 82 Ops.Cal.Atty.Gen. 83 (1999)
 85 Ops.Cal.Atty.Gen. 60 (2002)
 86 Ops.Cal.Atty.Gen. 138(2003)
 89 Ops.Cal.Atty.Gen. 217 (2006)

Management Resources References

Attorney General Opinion

Attorney General Opinion

Court Decision

Court Decision

Court Decision

Court Decision

Court Decision

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Fair Political Practices Commission Publication

Institute For Local Government Publication

Institute for Local Government Publication

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Cross References

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1340

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4312.8

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92 Ops.Cal.Atty.Gen. 19 (2009)

92 Ops.Cal.Atty.Gen. 26 (2009)

Davis v. Fresno Unified School District (2015) 237 Cal.App.4th 261

Klistoff v. Superior Court (2007) 157 Cal.App.4th 469

Kunec v. Brea Redevelopment Agency (1997) 55 Cal.App.4th 511

McGee v. Balfour Beatty Construction, LLC, et al. (2016) 247 Cal. App. 4th 235

Thorpe v. Long Beach Community College District (2000) 83 Cal.App.4th 655

Conflict of Interest: Overview of Key Issues for Governing Board Members, Fact Sheet, July 2010

Can I Vote? A Basic Overview of Public Officials' Obligations Under the Conflict-of-Interest Rules, 2005

Understanding the Basics of Public Service Ethics: Personal Financial Gain Laws, 2009

Understanding the Basics of Public Service Ethics: Transparency Laws, 2009

[CSBA District and County Office of Education Legal Services](#)[Institute for Local Government](#)[Fair Political Practices Commission](#)[CSBA](#)**Description**[Access To District Records](#)[Access To District Records](#)[Relations Between Private Industry And The Schools](#)[Federal Grant Funds](#)[Federal Grant Funds](#)[Expenditures And Purchases](#)[Bids](#)[Bids](#)[Management Of District Assets/Accounts](#)[Management Of District Assets/Accounts](#)[Investing](#)[Debt Issuance And Management](#)[Consultants](#)[Employment Of Relatives](#)[Resignation](#)[Nonschool Employment](#)[Employment Of Relatives](#)[Resignation](#)[Nonschool Employment](#)[Employment Of Relatives](#)

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4317.2
4336
6161.1
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