

**CONFLICT OF INTEREST CODE FOR THE CITY COUNCIL DEPARTMENTS,
COUNCIL ADMINISTRATION, AND OFFICE OF INDEPENDENT BUDGET ANALYST**

APPENDIX A

<u>Position</u>	<u>Duties</u>	<u>Category</u>
Executive Assistant	Acts as principal assistant to the Councilmember with administrative responsibilities for the operation of the Council office. Performs research and analysis of issues and makes recommendations thereon. Provides staff support to the Councilmember as required.	1
Council Representatives I and II	Responsible for constituent services. Represents the Councilmember before community groups and other organizations. Performs research and analysis of issues and makes recommendations thereon.	1
Program Coordinator	Will assist all City Council offices on public communication matters and will serve as liaison between the Council Administration Department, City Council communication staff, and the City's Communications Department. Will assist with the development and implementation of City Council communication policies, develop a strategy for communicating Council Work Plan priorities to the public and develop Council Policies to support City Council's communication efforts.	1
Program Manager	Administers IT-related policies and recommends changes; develops and implements IT-related contracts and contract management. Reviews issues brought before the appropriate Standing City Council Committee; reviews policy and procedures and municipal codes related to the Standing Committees and makes recommended revisions or develops new procedures as needed.	1
	Will serve as City Council's liaison to the City's Government Affairs Department and will make recommendations on pending and proposed federal and state legislation to assist the City Council with decision-making; serve as a representative of the Council President or City Council before organizations and agencies on the City Council's role or position on federal or state legislative matters; develop procedures to identify state, federal, and local intergovernmental policy priorities for inclusion into the annual legislative	1

platform and Council President's Work Plan for the City Council; and review, update, and develop Council Policies relating to government affairs.

Independent Budget Analyst	Acts as principal legislative and budgetary resource to the City Council as a whole by providing fiscal and legislative analyses. Makes recommendations regarding proposals brought by the Mayor and executive departments. Assists Council in drafting legislation. Makes presentations to Council and provides review and analyses on all budgeting proposals and the City's annual budget process. Represents the City Council in the labor negotiations process.	1
Deputy Director, Independent Budget Analyst	Reporting to the Independent Budget Analyst, oversees staff and operations of the Office of the IBA. Performs research and analysis of issues and makes recommendations thereon.	1
Budget/Legislative Analyst I & II	Reporting to the Independent Budget Analyst, performs research and analysis of issues and makes recommendations consistent with the duties of the Independent Budget Analyst.	1

Consultant/New Positions
(Category to be determined on a case-by-case basis)

Consultant and new positions shall be included in the list of designated employees and shall disclose pursuant to the disclosure category in the code subject to the following limitation:

The Councilmember may determine in writing that a particular consultant or new position, although a “designated position,” is hired to perform a range of duties that is limited in scope and thus is not required to fully comply with the disclosure requirements described in this section. Such written determination shall include a description of the consultant’s or new position’s duties and, based upon that description, a statement of the extent of disclosure requirements. The Councilmember’s determination is a public record and shall be retained for public inspection in the same manner and location as this conflict of interest code.

The following classifications are not subject to this Conflict of Interest Code and shall not be required to file economic disclosure forms:

1. Uncompensated Interns
2. Hourly employees (interns) who do not fall into one of the categories listed above and who are not permanent employees

**CONFLICT OF INTEREST CODE FOR THE CITY COUNCIL DEPARTMENTS,
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APPENDIX B

As used in Appendix B, “the City” means the City of San Diego.

Category 1: Investments and business positions in any business entity located in or doing business with the City.

Income and gifts from sources located in or doing business with the City.

Interests in real property located in the City, including property located within a two-mile radius of any property owned or used by the City.

Category 2: Consultants and new positions shall be included in the list of designated employees and shall (As required) disclose pursuant to the broadest disclosure category in the code subject to the following limitation:

The Councilmember may determine in writing that a particular consultant or new position, although a “designated position,” is hired to perform a range of duties that is limited in scope and thus is not required to fully comply with the disclosure requirements described in this section. Such written determination shall include a description of the consultant’s or new position’s duties and, based upon that description, a statement of the extent of disclosure requirements. The Councilmember’s determination is a public record and shall be retained for public inspection in the same manner and location as this conflict of interest code.

**Agency Report of:
New Positions**

A Public Document

**California
Form 804**

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

City Council, Council Administration, and Independent Budget Analyst

Amendment

Date of Original Filing:

(month, day, year)

Agency Contact

Jackeline Montilla

Phone Number

619-236-6441

Email

jmontilla@sandiego.gov

2. New Position Information

Position Title/Classification and Job Summary	Assigned Category	OR	Disclosure Requirement	Assuming/Start Date (Optional)
Program Manager	1			Start <u> </u> / <u> </u> / <u> </u> <u>m</u> / <u>d</u> / <u>yr</u>
Program Coordinator	1			Start <u> </u> / <u> </u> / <u> </u> <u>m</u> / <u>d</u> / <u>yr</u>
				Start <u> </u> / <u> </u> / <u> </u> <u>m</u> / <u>d</u> / <u>yr</u>
				Start <u> </u> / <u> </u> / <u> </u> <u>m</u> / <u>d</u> / <u>yr</u>
				Start <u> </u> / <u> </u> / <u> </u> <u>m</u> / <u>d</u> / <u>yr</u>
				Start <u> </u> / <u> </u> / <u> </u> <u>m</u> / <u>d</u> / <u>yr</u>

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.

Mary Ann Wallace

Signature

Mary Ann Wallace

Name

Director of Council Administrati

12/9/25

(month, day, year)

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

Print

Clear

Agency Report of: New Positions

A Public Document

California
Form 804

State and local government agencies may use this form to identify new positions that will make or participate in making governmental decisions on behalf of the agency. An individual in a newly created position must file a Statement of Economic Interests (Form 700) within 30 days of assuming office.

This form identifies the Statement of Economic Interests, Form 700, disclosure requirements for individuals serving in new positions. This form is for the agency's internal use and should be maintained by the agency in the same manner as the agency's conflict of interest code. For more information, refer to the FPPC website www.fppc.ca.gov and Regulations 18700.3 and 18734.

Disclosure Requirements

- Disclosure requirements should conform to the range of duties.
- Alternatively, the agency must require an individual to file under the broadest disclosure category in the agency's conflict of interest code or, if the agency does not have a conflict of interest code, full disclosure.

Full disclosure includes reporting all investments, business positions, and interests in real property held on the date of assuming office and income received during the 12 months immediately preceding assuming office.

When a new position is added, in addition to completing this form, the agency should begin the process to amend the conflict of interest code.

Examples:

An agency added a new data processing manager position. The individual will be assigned the same disclosure category that the agency's other IT staff are assigned.

An agency implemented a new licensing program and a new manager position was added. Because this was a new program, the agency provided a written description of the individual's disclosure requirements which included sources subject to the licensing procedures.

An agency reorganized and changed the duties of several positions listed in the conflict of interest code. This form is not required as positions are not new. The agency should begin to amend its conflict of interest code if the range of authority and types of decisions changed.

An agency changed the titles but not the duties and responsibilities of several positions. This form is not required. The agency must file an amendment to update the conflict of interest code.

Instructions

Part 1

Identify the agency, contact information, and provide the amendment explanation in the comment section when applicable.

Part 2

Identify the new position(s) and describe the position's duties. Identify the disclosure by:

- Assigning an existing category(s) in the agency's code, or
- Writing a disclosure requirement.

Complete if the agency knows the employment date.

Part 3

The agency's conflict of interest code should identify the position that is responsible for the verification.

Example

Agency Report of: New Positions		A Public Document		California Form 804
1. Agency Name (Also include Division, Department, or Region if applicable) CA Joint Powers Authority		<input type="checkbox"/> Amendment		Date of Original Filing: (month, day, year)
Agency Contact Smith, Adam Executive Director				
Phone Number 555-555-5555	Email adam.smith@cjpa.ca.gov			
2. New Position Information				
Position Title/Classification and Job Summary	Assigned Category	OR	Disclosure Requirement Assuming/Start Date (Optional)	
Data Processing Manager (manages IT Dept)	3		Start <u>3</u> / <u>8</u> / <u>xx</u> <u>m</u> / <u>d</u> / <u>yr</u>	
Licensing Director (duty statement attached)	3	All investments, business positions in business entities, and sources	Start <u>3</u> / <u>8</u> / <u>xx</u> <u>m</u> / <u>d</u> / <u>yr</u>	
Licensing Director (duty statement attached)	3	of income, including gifts, loans, and travel payments, from entities	Start <u>1</u> / <u>1</u> / <u>xx</u> <u>m</u> / <u>d</u> / <u>yr</u>	
Licensing Director (duty statement attached)	3	that are of the type subject to licensing by the Department or are subject	Start <u>1</u> / <u>1</u> / <u>xx</u> <u>m</u> / <u>d</u> / <u>yr</u>	
Licensing Director (duty statement attached)	3	to regulation by the Department.	Start <u>1</u> / <u>1</u> / <u>xx</u> <u>m</u> / <u>d</u> / <u>yr</u>	
Licensing Director (duty statement attached)	3	(Alternately, attach a written explanation.)	Start <u>1</u> / <u>1</u> / <u>xx</u> <u>m</u> / <u>d</u> / <u>yr</u>	
			Start <u>1</u> / <u>1</u> / <u>xx</u> <u>m</u> / <u>d</u> / <u>yr</u>	
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.				

Adam Smith
Signature _____ Name _____ Title _____

3-10-XX
(month, day, year)

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

Position Detail: Program Manager

Overarching categories of work

- Data
- Learning and Development
- Policy
- Budget Equity Framework

Data

- Develop new, and enhance existing, data driven tools to identify and track the impacts of disparities, gaps and deficiencies in support of the City's ability to make equitable budget, policy and operational decisions.

Learning and Development

- Integrate an Operationalizing Equity Model through providing learning and Development, equity-centered coaching, and technical assistance to departments to advance citywide racial equity outcomes.

Policy

- Provide social equity research and analysis on the City of San Diego's policies.

Budget Equity Framework

- Apply a citywide Budget Equity Framework to review and analyze across City Processes that have budget equity implications to reduce disparities, gaps, and deficiencies across the four Equity Factors: Access, Assets, Neighborhoods, and Processes.

Supervision job duties:

- The Programs Manager has distinct supervisory duties that involve directing staff to achieve organizational objectives through training, performance evaluation, and daily operational management to guide the implementation of Citywide Tactical Equity Plans. The operational oversight for Program Managers includes managing daily tasks, Division Workplan workflow deliverables, and supervising Program Coordinators, interns, fellows, and other staff as assigned. Program Managers create an equitable and inclusive workforce by utilizing servant-leadership skills to ensure the work climate fosters an environment where emotional intelligence drives

2026 Race and Equity Job Duties: Program Manager

the mechanics of all assigned duties. Team development includes addressing employee issues and opportunities for growth, mediating conflicts, and acting as a bridge to the division leadership.

Division Workplan Oversight Management:

- Program Managers are responsible for overseeing Division Workplans, which involve monitoring programs and initiatives, providing long-term direction, integrating key performance indicators, goals, and objectives, and ensuring execution aligns with the division's mission and values. Strategic adaptability is a key component of aligning overlapping priorities within each program area to ensure all departments are implementing Tactical Equity Plans. Programs Manager are assigned departments to provide technical assistance to ensure city staff is creating strategies and deliverable on equitable outcomes to address gaps, disparities, and deficiencies. Program Managers provide guidance to Program Coordinators to enhance technical assistance offering provided to departments.

City Council and Mayor's Office: IBA staff role

- Program Managers will provide budgetary and policy analysis for the City Council during committee meetings and ongoing council meetings. Program Managers will assess equity implications during a formal, comprehensive review and analysis of the Mayor's proposed annual budget and City Council docketed items. Program Managers gather and organize Tactical Equity Plan strategies to critique the equity impact on budgetary issues. The gathering of information includes reviewing comparative studies of other cities related to municipal finance and operational practices and partnering with departments to gather relevant information to inform how we address inequitable outcomes. The construction of formal reports identifying equity implications is a primary duty assigned to Program Managers, which includes reviewing the economic effects of proposed legislation and outlining concise recommendations. Program Managers provide oversight to Programs Coordinators to help with the development of policy analysis for the City Council during committee meetings and ongoing council meetings.

2026 Race and Equity Job Duties: Program Coordinator

Position Detail: Program Coordinator

Overarching categories of work

- Data
- Learning and Development
- Policy
- Budget Equity Framework

Data

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Learning and Development

- Integrate an Operationalizing Equity Model through providing learning and Development, equity-centered coaching, and technical assistance to departments to advance citywide racial equity outcomes.

Policy

- Provide social equity research and analysis on the City of San Diego's policies.

Budget Equity Framework

- Apply a citywide Budget Equity Framework to review and analyze across City Processes that have budget equity implications to reduce disparities, gaps, and deficiencies across the four Equity Factors: Access, Assets, Neighborhoods, and Processes.

Division Workplan

- Program Coordinators are assigned tasks and responsibilities to support the implementation of Division Workplans within each assigned program area. Program Coordinators work on the guidance of Program Managers to integrating key performance indicators, goals, and objectives, and ensuring execution aligns with the division's mission and values. Programs Coordinators are assigned departments to provide technical assistance to ensure city staff is creating strategies and deliverable on equitable outcomes to address gaps, disparities, and deficiencies.

City Council and Mayor's Office: IBA staff role

2026 Race and Equity Job Duties: Program Coordinator

- Program Coordinators will receive guidance from Program Managers to create budgetary and policy analysis for the City Council during committee meetings and ongoing council meetings. Program coordinators will help identify equity implications during a formal, comprehensive review and analysis of the Mayor's proposed annual budget and City Council docketed items. Program coordinators gather and organize Tactical Equity Plan strategies to critique the equity impact on budgetary issues. The gathering of information includes reviewing comparative studies of other cities on municipal finance and operational practices, and partnering with departments to gather relevant information to inform how we address inequitable outcomes. The construction of formal reports identifying equity implications will be submitted to Program Managers for formal review, with concise recommendations outlined.