

**PERFORMANCE & ANALYTICS  
 CONFLICT OF INTEREST CODE**

**APPENDIX A**  
**DESIGNATED POSITIONS, DUTIES, AND CATEGORIES**

<u>Position</u>	<u>Duties</u>	<u>Category</u>
Director	<ul style="list-style-type: none"> <li>• Direct the Performance &amp; Analytics Department.</li> <li>• Serve as the lead for the City’s performance management and organizational efficiency and effectiveness programs and initiatives, including open data implementation, analytics, and customer experience and service delivery solutions.</li> <li>• Manage the City’s performance using a variety of tools, such as reengineering, Lean Six Sigma, competitive bidding, strategic planning, open data, analytics, internal performance reviews, training and education, rewards and discipline, employee wellness, and feedback instruments.</li> <li>• Participate in Meet and Confer discussions with labor organizations and management, as needed.</li> <li>• Present recommendations and report on the results of initiatives and programs to the Mayor’s Office, City Council, labor organizations, and public.</li> <li>• Prepare budgets and approve expenditures.</li> </ul>	1
Program Manager	<ul style="list-style-type: none"> <li>• Manage Performance &amp; Analytics Department programs.</li> <li>• Assist the Director by developing, implementing, and/or monitoring the City’s performance management and organizational efficiency and effectiveness programs and initiatives, including open data implementation, analytics, and customer experience and service delivery solutions.</li> <li>• Direct studies and research, establish and facilitate internal or external working groups and meetings, and conduct analysis.</li> <li>• Formulate recommendations for improvement for consideration by the Mayor and City Council.</li> <li>• Prepare budgets and approve expenditures and provide administrative oversight.</li> </ul>	1

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<u>Position</u>	<u>Duties</u>	<u>Category</u>
	<ul style="list-style-type: none"> <li>• Undertake special assignments, including participation in internal or external working groups and committees, as assigned.</li> </ul>	
Program Coordinator	<ul style="list-style-type: none"> <li>• Assist Program Managers and the Director in developing, implementing, and/or monitoring the City’s performance management and organizational efficiency and effectiveness programs and initiatives, including open data implementation, analytics, and customer experience and service delivery solutions.</li> <li>• Manage research and study efforts in support of the City’s performance management programs and organizational efficiency and effectiveness initiatives, including open data, analytics, and customer experience and service delivery solutions.</li> <li>• Assist in formulating recommendations for improvement for consideration by the Mayor and City Council.</li> <li>• Make budget and expenditure recommendations.</li> <li>• Undertake special assignments, including participation in internal or external working groups and committees, as assigned.</li> </ul>	2
Consultant/ New Position	<ul style="list-style-type: none"> <li>• Perform consulting or staff services in support of programs managed by the Performance &amp; Analytics Department.</li> </ul>	3

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**APPENDIX B  
DISCLOSURE CATEGORIES**

**CATEGORY 1**

1. All reportable investments, business positions, and income (including gifts) from any firm or business entity located in or doing business with the City of San Diego.
2. All reportable interests in real property located in the City of San Diego, including property located within a two-mile radius of any property owned or used by the City.
3. All reportable interests in real property owned or used by any person or business entity that supplies goods or services to the City of San Diego, is a tenant of the City of San Diego, or is granted authority by the City of San Diego to use City facilities.
4. All reportable income, including gifts, from any person or business entity that supplies goods or services to the City of San Diego or is granted authority by the City of San Diego to use City facilities.

**CATEGORY 2**

1. All reportable investments and business positions in any firm or business entity that supplies goods or services to the City, is a tenant of the City, is an adverse party to the City in a legal proceeding, or is granted authority by the City to use City facilities.
2. All reportable income, including gifts, from any person or business entity that supplies goods or services to the City, is a tenant of the City, is an adverse party to the City in a legal proceeding, or is granted authority by the City to use City facilities.
3. All reportable interests in real property owned or used by any person or business entity that supplies goods or services to the City, is a tenant of the City, is an adverse party to the City in a legal proceeding or is granted authority by the City of San Diego to use City facilities.

**CATEGORY 3**

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

The Director may determine in writing that a particular consultant/new position, although a “designated person,” 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/new position’s duties and, based upon that description, a statement of the extent of disclosure requirements. The Director’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.