

2008 LOCAL AGENCY BIENNIAL NOTICE

OCT 01 2008

Name of Agency: Santa Maria Joint Union High School District

Mailing Address: 2560 Skyway Drive, Santa Maria, CA 93455

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This agency has reviewed its conflict-of-interest code and has determined that:

An amendment is required. The following amendments are necessary:

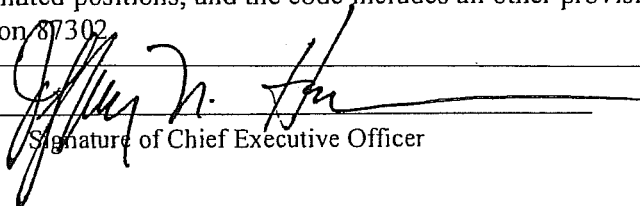
(Check all that apply)

- Include new positions (including consultants) that must be designated
- Delete positions that manage public investments from the list of designated positions
- Revise disclosure categories
- Revise the titles of existing positions
- Delete titles of positions that have been abolished
- Other *(describe)* _____

Code is currently under review by the code-reviewing body.

No amendment is required.

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


Signature of Chief Executive Officer

9/17/2008
Date

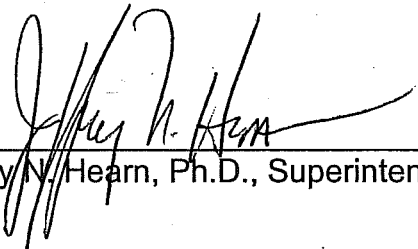
Complete this notice regardless of how recently your code was approved or amended.

Please return this report *no later than* October 1, 2008 to:

SANTA BARBARA COUNTY ELECTIONS
P.O. Box 159
Santa Barbara, CA 93102-0159
Attn: Suzanne Jackson

DECLARATION OF CHIEF EXECUTIVE OFFICER

As the Chief Executive Officer for the Santa Maria Joint Union High School District, I am declaring that the Conflict of Interest Code for the Santa Maria Joint Union High School District specifically enumerates each of the positions within the agency which involve the making or participating in the making of decisions which may foreseeably have a material financial effect on any financial interest and that this agency has satisfied the requirements of subsection (c) of Regulation 18750.1 preliminary to formulation of the code.



Jeffrey N. Hearn, Ph.D., Superintendent

WRITTEN EXPLANATION OF REASONS FOR AMENDMENT
to the
CONFLICT OF INTEREST CODE
for the
SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT
2008

The Santa Maria Joint Union High School District is amending its Conflict of Interest Code to bring it current with the existing organizational structure of the agency. The specific amendments and an explanation of each proposed change is as follows:

The "Assistant Director of Fiscal Services" position is a new classification and is being amended into the code. The Assistant Director of Fiscal Services oversees and coordinates the accounting, budget control, fiscal record management and reporting activities and functions of the district, and is under the supervision of the Assistant Superintendent of Business Services.

The "Energy Manager" position is a new classification and is being amended into the code. The Energy Manager works to establish accountability for energy consumption and is responsible for developing and monitoring the district's energy management program. The Energy Manager is under the supervision of the Assistant Superintendent of Business Services.

CONFLICT OF INTEREST CODE
for the
SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT

The Political Reform Act, Government Code Section 81000, et. seq., requires state and local government agencies to adopt and promulgate Conflict of Interest Codes. The Fair Political Practices Commission has adopted a regulation (2 California Code of Regulations Section 18730) which contains the terms of a standard Conflict of Interest Code, which can be incorporated by reference in an agency's code. After public notice and hearing, it may be amended by the Fair Political Practices Act. Therefore, the terms of 2 California Code of Regulations Section 18730 and any amendments to it duly adopted by the Fair Political Practices Commission, are hereby incorporated by reference. This regulation and the attached Appendix designating officials and employees and establishing disclosure categories, shall constitute the conflict of interest code of the **SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT**.

Designated employees shall file statements of economic interests with the SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT who will make the statements available for public inspection and reproduction. (Government Code §81008).

DISCLOSURE CATEGORIES

Category 1

Designated employees assigned to this category must report:

(a) Interests in real property which are located in whole or in part: (1) within the boundaries of the District, (2) within two miles of the boundaries of the District, or (3) within two miles of any land owned or used by the District, including any leasehold, beneficial or ownership interest or option to acquire such interest in real property.

(b) Investments and business positions, in business entities or income from sources which engage in the acquisition or disposal of real property within the jurisdiction.

(c) Investments and business positions, in business entities or income from sources which: (1) are contractors or subcontractors engaged in the performance of work or services of the type utilized by the District, or (2) which manufacture or sell supplies, books, machinery or equipment of the type utilized by the District.

Category 2

Designated employees assigned to this category must report:

Investments and business positions in business entities and income from sources which: (1) are contractors or subcontractors engaged in the performance of work or services of the type utilized by the employee's department, or (2) which manufacture or sell supplies, books, machinery or equipment of the type utilized by the employee's department. For the purpose of this category, a principal's department is his entire school.

CONFLICT OF INTEREST CODE
for the
SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT

<u>Designated Positions</u>	<u>Disclosure Category</u>
Board Members	1
Superintendent	1
Assistant Superintendent of Human Resources	2
Assistant Superintendent of Programs, Testing & Curriculum	2
Assistant Superintendent of Business Services	2
Principal	2
Director of Alternative Education	2
Director of Student Services	2
Assistant Principal	2
Director of English Language Learning Programs	2
Director of Facilities and Operations	2
Director of Information Systems	2
Director of Fiscal Services	2
<u>Assistant Director of Fiscal Services</u>	2
<u>Energy Manager</u>	2
Plant Manager	2
Facilities Planner	2
Facility Engineer	2
Transportation Manager	2
Food Service Manager	2
Consultant*	2

* The Chief Executive Officer may determine in writing that a particular consultant, 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 duties and, based upon that description, a statement of the extent of disclosure requirements. The Chief Executive Officer'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.

ASSISTANT DIRECTOR OF FISCAL SERVICES

BASIC FUNCTION:

Under the direction of the Assistant Superintendent of Business Services; plan, organize, control and direct the activities and operations of the Fiscal Services Department; coordinate assigned activities with other divisions, departments, school districts, and outside agencies; maintain the fiscal integrity and solvency of the organization; assure programs are operating within the appropriate fiscal parameters and remain in compliance with the appropriate federal, state or local regulations; supervise the performance of assigned personnel.

REPRESENTATIVE DUTIES:

- Direct, coordinate, analyze and administer activities related to the staffing and operational activities of the Fiscal Services Department including payroll, accounts receivable, ADA, auditing and related fiscal activities. **E**
- Direct the development of average daily attendance (ADA), long-term trend analyses and discuss trends and estimations with the administration; review ADA and enrollment projections and determine staffing needs; calculate total salary and benefit costs and estimated revenues for District programs and operations; perform various calculations in preparation of the State report and prepare the State report according to established format requirements. **E**
- Supervise and evaluate the performance of assigned personnel; interview and select employees and recommend transfers, reassignment, termination and disciplinary actions. **E**
- Review pertinent legislation and assure District compliance with rules, regulations and laws; plan and implement specific recommendations emanating from the State Department of Education. **E**
- Direct, coordinate and administer the year-end closing process and compilation of fiscal year financial statements; prepare related check-lists and calendars; analyze grant and program documents to determine annual expenditures, revenues and related accounts payable, accounts receivable or deferred revenue; assure legal compliance and accuracy of financial reports; format financial information into the appropriate general ledger and present results to the Superintendent and Board. **E**
- Provide technical expertise, information and assistance to the Assistant Superintendent regarding assigned functions; assist in the formulation and development of policies, procedures and programs; develop and administer goals, objectives, policies, and priorities for assigned service areas; identify resource needs. **E**
- Direct the preparation of a variety of financial, statistical, and budgetary statements and reports including monthly financial statements, budget transfers, cost studies, cash flow analyses and revenue and expenditure projections; direct the preparation and maintenance of a variety of narrative and statistical reports, records and files related to assigned activities and personnel; analyze and reconcile financial statements; assure timely and accurate submission of financial reports. **E**
- Supervise the preparation of payroll and benefits, including the implementation of computerized position control system. **E**
- Communicate with other administrators, personnel and outside organizations to coordinate activities and programs, resolve issues and conflicts and exchange information. **E**
- Direct a variety of other assigned activities including internal and external audits, property and inventory valuations and management of fixed assets, debt service management, general ledger maintenance, budget revisions to District funds, mandated cost program, development of procedure and policy manuals, and other assigned areas. **E**
- Operate a computer and assigned software programs; operate other office equipment as assigned. **E**
- Attend and conduct a variety of meetings as assigned; make presentations as directed; serve as representative for the various fiscal aspects of the organization and provide necessary fiscal information for decision-making; provide workshops and training to District staff as needed; participate on assigned committees. **E**
- Maintain knowledge of current and pending legislation related to assigned activities; research, train and implement federal and state required accounting changes including policies and procedures development and implementation; interpret, explain and implement necessary changes.
- Perform related duties as assigned.

KNOWLEDGE OF:

Planning, organization and direction of the Fiscal Services Department.
Principles, techniques and methods of government accounting, auditing, and budgeting.
Program analysis and revenue forecasting principles and practices.
Financial and statistical analysis techniques and principles.
Computer information systems operations and capabilities and their applications to accounting, budget development and financial management.
Record retention requirements.
Budget preparation and control.
Principles and practices of administration, supervision and training.
Applicable laws, codes, regulations, policies and procedures.
Interpersonal skills using tact, patience and courtesy.

ABILITY TO:

Plan, organize and administer the activities and operations of the Fiscal Services Department.
Coordinate assigned activities with other divisions, departments, school districts, and outside agencies.
Maintain the fiscal integrity and solvency of the organization.
Assure programs are operating within the appropriate fiscal parameters and remain in compliance with the appropriate federal, state or local regulations.
Prepare District budget.
Make complex mathematical projections and calculations.
Design, implement and maintain accounting and budgeting systems.
Apply, interpret and implement accounting principles and practices to a variety of complex accounting transactions and problems.
Analyze and interpret various financial records and reports.
Interpret and apply related federal, state, and local laws, codes and regulations.
Conduct research and prepare variety of complex financial statements and reports.
Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.
Supervise the performance of assigned personnel.
Communicate effectively both orally and in writing.
Establish and maintain cooperative and effective working relationships with others.
Operate a computer and assigned office equipment.
Meet schedules and time lines.
Work independently with minimal direction.
Direct the maintenance of a variety of reports and files related to assigned activities.
Prepare comprehensive narrative and statistical reports.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: bachelor's degree in accounting, finance, business administration or related field and five years increasingly responsible financial management and accounting experience in an educational or local government organization including two years experience in a supervisory capacity.

LICENSES AND OTHER REQUIREMENTS:

Valid California driver's license.

WORKING CONDITIONS:

Office environment.
Driving a vehicle to conduct work.

PHYSICAL ABILITIES:

Hearing and speaking to exchange information and make presentations.
Dexterity of hands and fingers to operate a computer keyboard.
Seeing to read a variety of materials.

7/17/07

SMJUHSD

Management

ENERGY MANAGER

DEFINITION:

Under general direction of the Director of Facilities and Operations, the Energy Manager works to establish accountability for energy consumption at every level in the school district. The Energy Manager is responsible for developing and monitoring the District's energy management program per Board policy and the Superintendent's guidelines for the purpose of reducing utility consumption.

Basic areas of responsibility include: administration and record keeping, accountability, reporting, program implementation, promoting district employee involvement, and validating energy management system compliance to the district's energy policy and guidelines.

The candidate must have an independent work ethic, good judgment capabilities, have the ability to maintain positive public relations, and be persuasive. The candidate must be computer literate, be able to interpret technical data, and demonstrate an ability to communicate with technical and non-technical individuals.

EXAMPLES OF DUTIES:

- With the assistance of Energy Education, Inc, establish a program to promote energy conservation through positive feedback to all levels of the District and involve all personnel and students in taking ownership for success of the program. E
- Coordinate with internal and external public relations support to utilize all media opportunities to promote successes of the district's energy management program. E
- Serve as district representative at management-level meetings, seminars, and conferences relating to energy use and conservation. E
- Advise and make recommendations to the district administration on alternate energy sources, consumption and general energy conservation measures. E
- Provide input on contractual support activities (capital projects) related to energy management and the purchase of any products that affect energy consumption. E
- Prepare energy requirement estimates and budget allotments for all District facilities and develop procedures for efficient utilization of energy sources. E
- Maintain all energy and water consumption records and data. E
- Provide regular communication with District administration, principals and operations staff regarding status of buildings/sites' utility consumption. E
- Perform regular "walk-through" audits of all the District's facilities to insure operating efficiency, optimum educational environment, and compliance with District's energy policy. Perform audits at all hours of operation, including nights and weekends. Tours to include visits to roof tops, utility basements, and playfields. E
- Implement weekday, weekend, holiday, and summer shutdown checklists for every building in the district. E
- Implement night setback program for every building on weeknights, weekends, holidays and summer recess. E
- Communicate with utility providers to ensure that the district is on the proper utility rate schedule and is receiving correct billing. E
- Investigate and pursue District participation in rebate programs. E
- Assist with the design and maintenance of the programming for computerized energy management system to ensure operating efficiency. Update programs as necessary. E
- Create technical specifications for various projects and evaluate options related to energy conservation: HVAC, roof systems, insulation, security systems, public address systems, voicemail systems, paving, landscaping, and flooring. Implement the projects and guide them through to completion. E
- Investigate environmental and air quality issues for the district utilizing various methods and equipment. Report findings and recommend solutions to Facilities Director. Facilitate corrective actions and follow-up results. E

KNOWLEDGE OF:

Provisions of the various codes enforced by local, state, and county agencies as they relate to building construction and energy conservation.
California Education Code as it relates to maintenance, operations, safety and energy conservation in schools.
Modern methods of landscape design with an emphasis on drought tolerance and reduced water usage.
Computer Applications such as CAD, spreadsheets, databases, and energy management systems.

ABILITY TO:

- Work independently.
- Communicate effectively and diplomatically.
- Analyze and interpret technical data and communicate it to non-technical individuals.
- Apply and explain rules, regulations, policies, and procedures.
- Interpret, read, and check blueprints.
- Understand and carry out oral and written instructions.
- Develop and maintain cooperative working relationships; deal tactfully with public and staff.
- Keep records and prepare reports.
- Develop and maintain an effective training program.

EDUCATION & EXPERIENCE:

- Bachelor's Degree in engineering, industrial management, or related field
- Three years experience in management/supervision of maintenance and operations or energy management program.

LICENSES AND OTHER REQUIREMENTS:

- Valid California driver's license. Provide a DMV printout dated within two months.

WORKING CONDITIONS:

- Work is performed in an office (20%) and in the field (80%).
- Commitment to irregular hours (night, weekend, holiday and summer audits).
- Must be able to walk and stand for long periods.
- Working in confined spaces may be required.
- Regular exposure to fumes, dust, dirt, oil, grease and/or noise.
- Driving a vehicle to conduct work.
- Must be able to read various forms of written materials and must be able to recognize different signs and symbols.

PHYSICAL ABILITIES:

- Dexterity of hands and fingers to operate a variety of equipment and tools.
- Hearing and speaking to exchange information.
- Seeing to observe needed and completed repairs.
- Climbing ladders
- Reaching overhead and horizontally
- Standing for extended periods of time
- Walking over rough or uneven surfaces
- Bending at the waist, kneeling or crouching
- Lifting heavy objects to conduct inspections.
- Ability to push, pull, or lift at least 25 pounds

3/12/08
SMJUHSD
Management