

2012 Local Agency Biennial Notice

Name of Agency: Santa Maria Joint Union High School District

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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 requires disclosure by 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:**

(Mark all that apply.)

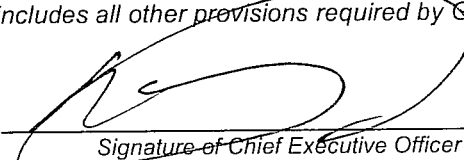
- ☐ Include new positions.
- ☐ Revise disclosure categories.
- ☒ Revise the titles of existing positions.
- ☒ Delete titles of positions that have been abolished and/or positions that no longer make or participate in making governmental decisions.
- ☐ Other *(describe)* _____

☐ **No amendment is required.**

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

Verification

The agency's code accurately designates all positions that make or participate in the making of governmental decisions; the disclosure categories assigned to those positions accurately require the disclosure of 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 the designated positions; and the code includes all other provisions required by Government Code Section 87302.



Signature of Chief Executive Officer

9-19-12

Date

Complete this notice regardless of how recently your code was approved or amended.
Please return this notice no later than **October 1, 2012**, or the date specified by your agency, if earlier, to:

(PLACE RETURN ADDRESS OF CODE REVIEWING BODY HERE)

PLEASE DO NOT RETURN THIS FORM TO THE FPPC.

**WRITTEN EXPLANATION OF REASONS FOR AMENDMENT
to the
CONFLICT OF INTEREST CODE
for the
SANTA MARIA JOINT UNION HIGH SCHOOL DISTRICT
2012**

NOTICE IS HEREBY GIVEN that the Santa Maria Joint Union High School District, pursuant to the authority vested in it by §87306 of the Government Code, proposes amendment to its Conflict of Interest Code. The purpose of these amendments is to implement the requirements of §87300 through §87302, and §87306 of the Government Code.

The Santa Maria Joint Union High School District proposes to amend its Conflict of Interest Code to include positions that involve the making or participation in the making of decisions that may foreseeably have a material effect on any financial interest, as set forth in subdivision (a) of §87302 of the Government Code.

Specifically, the proposed amendment will add positions that are newly created by the agency, revise positions due to reorganization of duties, and delete positions that are no longer applicable. Copies of the amended code are available and may be requested from the Human Resources Department.

At this time, no public hearing has been scheduled concerning the proposed amendments. If any interested person or the person's representative requests a public hearing, he or she must do so no later than August 8, 2012, by contacting the Superintendent's Office.

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 following positions are new and have been amended into the code, and have been designated as disclosure category 2:
Director of Learning Center
- The following positions have been revised and are designated as disclosure category 2:
Assistant Director of Fiscal Services revised to Budget Manager
Assistant Superintendent of Programs, Testing & Curriculum revised to Assistant Superintendent of Curriculum
Facilities Planner revised to Director of Support Services
- The following positions are currently unfilled and have been deleted from the code:
Director of Student Services
Facility Engineer

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
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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
<u>Director of Learning Center</u>	2
Director of Special 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
Assistant Director of Fiscal Services	2
Budget Manager	2
Energy Manager	2
Plant Manager	2
<u>Director of Support Services</u>	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.

DIRECTOR OF LEARNING CENTER

BASIC FUNCTION:

Under the direction of the Assistant Superintendent of Curriculum, plan, organize, control and direct the instructional program and personnel for the Learning Center.

REPRESENTATIVE DUTIES:

- Direct and participate in a planned program of classroom visitations and observations; recommend discipline, reassignment or termination action as appropriate; document evidence of substandard performance.
- Enforce applicable state and district codes, policies and laws; administer, monitor and evaluate district and school site discipline policies and safety programs.
- Plan and direct the business and fiscal operations of the Learning Center; develop and administer site budgets; assure proper allocation of funds for instructional and non-instructional equipment and materials.
- Direct the evaluation and revision of curricular and instructional programs in cooperation with appropriate district administrators; communicate with teachers to assure instructional programs meet student needs and district requirements.
- Establish, coordinate and maintain communication with community and parent groups and law enforcement officials.
- Prepare and write correspondence, bulletins and other communications on behalf of the school; arrange for school-level public relations and publicity for special events and achievements as appropriate.
- Conduct articulation activities with feeder schools and other district high schools; develop and direct an orientation program for new students.
- Plan, implement, direct and evaluate instructional and categorical programs in accordance with state and federal laws, district regulations and other specially funded program requirements.
- Assure the health, safety and welfare of students; oversee attendance, behavior management, counseling, guidance and other support services; provide individual academic and personal counseling to students and parents.
- Direct the implementation of staff development and in-service training; update staff on revised policies and procedures, and implement changes.
- Supervise and evaluate the performance of assigned personnel.
- Other duties as assigned.

REQUIRED QUALIFICATIONS:

Valid California Public School Teaching Credential

Valid California Administrative Credential

DESIRED QUALIFICATIONS:

Experience working with all levels of socio-economic students

Experience working at high school level

Bilingual: Spanish

DIRECTOR OF LEARNING CENTER – Continued

EXPERIENCE:

Three years successful teaching experience and demonstrated success in organization and management.

KNOWLEDGE OF:

Budget preparation and control.

Applicable laws, codes, regulations, policies and procedures.

Purpose, rules and regulations of State and Federal categorical programs.

Curriculum development policies and procedures.

ABILITY TO:

Coordinate assigned activities with other departments and outside agencies.

Communicate effectively both orally and in writing.

Analyze situations accurately and adopt an effective course of action.

Create a vision and inspire others to work positively.

Supervise and evaluate the performance of assigned staff.

LICENSES AND OTHER REQUIREMENTS:

Valid California driver's license.

8/31/2012

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BUDGET MANAGER

BASIC FUNCTION:

Under the supervision of the Director of Fiscal Services, the Budget Manager is responsible for the development, monitoring, management and state reporting requirements of the district budget. Serving as the budget supervisory staff person, the Budget Manager directs the continuous in-house auditing of local site and department budgets and provides support to school sites, programs, and departments.

REPRESENTATIVE DUTIES:

Coordinate and maintain budgets for all funds of the district including categorical programs. *E*

Monitor and manage the internal auditing of school, departmental, and ASB budgets. *E*

Provide support and oversight of the monitoring and maintenance of the business components of position control in conjunction with payroll and human resources. *E*

Conduct and attend staff, departmental, management, and other meetings as required. *E*

Attend district, community, site level committee meetings and school board meetings as required.

Maintain knowledge of current and pending legislation related to assigned activities. *E*

Project cost of salaries and benefits for negotiations as required. *E*

Prepare and/or review enrollment projections to determine staffing needs. *E*

Monitor and review monthly attendance reports. *E*

Prepare required reports for submission to the state and other various agencies. *E*

Initiate journal entries and budget revisions for approval. *E*

Maintain records of approved general journal entries and cash receipts. *E*

Work with the Director of Fiscal Services to reconcile all general ledger account balances monthly. *E*

Post general journal, cash receipts and disbursements and year-end accrual transactions to the general ledger for all funds maintained by the district, including General Fund (including categorical programs), Adult Education Fund, Cafeteria Fund, and Capital Funds. *E*

Reconcile and verify mathematical accuracy of financial or statistical data. *E*

Assure proper budget distribution of expense items and maintain appropriate audit trails. *E*

Respond to inquiries in person, by email, or on the telephone regarding account and program balances, budget transfers, journal entries and journal vouchers. *E*

Develop procedures to carry out the necessary related functions. *E*

Perform other related duties as assigned.

KNOWLEDGE OF:

Budget preparation and control

Methods of budget monitoring and control

Planning and organization of budgeting

School Governmental fund accounting practices and procedures

Federal and state laws, codes, and regulations governing the operations and business support services of public school districts.

Requirements for the operation of effective microcomputer operating methods and applicable standard business software applications, including Microsoft Excel and Word.

Program analysis and revenue forecasting principles and practices.

Financial and statistical analysis techniques and principles.

Interpersonal skills using tact, patience and courtesy.

ABILITY TO:

Plan, organize, and manage the school district's budget.

Coordinate assigned activities with other divisions, departments, school districts, and outside agencies.

Prepare district budget using state required software.

Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendation in support of goals.

Make complex mathematical projections and calculations.

Analyze and interpret various financial records and reports.

Meet schedules and timelines.

Work independently with minimal direction.

Demonstrate skills in the management of diverse human resources and personalities.

Effectively integrate and utilize technology applications in the performance of all duties.

Establish and maintain a cooperative and harmonious working relationship with those contacted in the course of work.

EDUCATION AND EXPERIENCE:

Bachelor's degree in Accounting or related field; or Associate degree in Accounting/Business or a related field and 3 years of successful work in the area of school government or public sector accounting

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

Sitting for extended periods of time

Bending at the waist, kneeling or crouching to retrieve and store files

Seeing to read a variety of materials

1/4/12

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ASSISTANT SUPERINTENDENT of CURRICULUM

PRIMARY FUNCTION:

Under the direction of the Superintendent, responsible for the comprehensive programs and services that support the instructional program; provide decisive, district-wide administrative leadership through the use of effective communications skills, collaborative problem solving, motivation, innovation; organizational efficiency and accountability.

REPRESENTATIVE DUTIES:

- Responsible for planning and organizing all curricular and instructional programs within the district including federal requirements of No Child Left Behind (Program Improvement, AYP, and state API). **E**
- Provide leadership in staff development activities that ensure achievement of established district goals and objectives. **E**
- Provide district-wide leadership that promotes high expectations and standards for quality teaching and learning incorporating the interpretation and use of data. **E**
- Provide oversight leadership in the following areas: assessment, special education, special projects, teacher evaluations, technology, Migrant Education, bilingual programs, alternative education, and all district categorical programs. **E**
- Provide leadership and focus for management on curricular and instructional issues. **E**
- Provide leadership in identifying instructional priorities for program development and improvement; develop strategies and training to support identified instructional priorities. **E**
- Provide pro-active leadership and present recommendations and alternatives to the Board through the Superintendent on curricular and instructional issues. **E**
- Coordinate the development and implementation of all assessment procedures, including but not limited to, CST, CAPA, CAHSEE, and Advanced Placement. **E**
- Provide leadership in developing and implementing district-wide goals and objectives. **E**
- Provide leadership and direction in the selection and purchase of state standards-based instructional materials. **E**
- Develop and implement the following budgets to directly support and promote achievement of established district-wide goals and objectives: staff development, state and federal categorical budgets. **E**
- Provide oversight management of the following budgets, including but not limited to, all district categorical programs, Special Education, Alternative Education, and technology. **E**
- Ensure district and site compliance with state and federal requirements as it relates to curriculum and instruction and state and federal categorical programs.
- Administer the development, implementation and evaluation of District staff development programs. **E**
- Serve as liaison between the District and its educational partners. **E**
- Prepare county, state and federal reports as needed. **E**
- Prepare and present reports relating to educational programs and progress. **E**
- Perform related duties as assigned.

KNOWLEDGE OF:

Applicable sections of State Education Code and other applicable codes, laws, rules and regulations related to assigned activities.

Public education system, county and community resources and agencies.

State frameworks.

Current research and trends in curriculum.

Principles and practices of administration, supervision and training.
Second language learner curriculum and instruction.
Effective staff development programs.
Instructional methodologies and strategies.
Assessment instruments.
Grant writing process.
Interpersonal skills using tact, patience and courtesy.
Oral and written communication skills.

ABILITY TO:

Plan and organize general curriculum and instruction, staff development, program evaluation and other areas as assigned by the Superintendent.
Implement collaborative and team building processes.
Plan and implement staff development programs.
Establish and maintain cooperative and effective working relationships with others.
Maintain records and prepare reports.
Communicate effectively both orally and in writing.
Read, interpret, apply and explain rules, regulations, policies and procedures.
Train, supervise and evaluate personnel.
Motivate staff to implement planned changes.
Develop, implement and evaluate instructional strategies based upon data analysis.
Coordinate a variety of schedules.
Meet schedules and time lines for staff responsible to Assistant Superintendent.
Work independently with little direction.
Plan and organize work.
Exchange information and make presentations.

EDUCATION AND EXPERIENCE:

Valid Secondary teaching Credential, CLAD or equivalent
Valid Administrative Credential
Master's degree (or higher)
Minimum 5 years successful teaching experience in a public secondary school
Minimum 5 years successful administrative experience in a public school district, as a high school principal and district office administrator

LICENSES AND OTHER REQUIREMENTS:

Valid California driver's license.

WORKING CONDITIONS:

ENVIRONMENT:

Office environment.
Driving a vehicle to conduct work.

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4/29/09

DIRECTOR OF SUPPORT SERVICES

BASIC FUNCTION:

Under the direction of the Assistant Superintendent of Business, plan, organize and direct the activities of the Districts Support Services Department including purchasing and warehouse; and facilities planning and construction functions.

Purchasing and Warehouse: Provide for the cost effective acquisition of all supplies, materials, equipment and services necessary for the efficient operation of the District. Responsible for contract administration, preparation of quotes, development of formal bid documents, maintenance of fixed asset records and disposal of surplus property. Responsible for ensuring that all procurement and contract procedures are in compliance with the Governing Board and Administrative policies, Education Code, Public Contract Code, and Federal, State and Local guidelines.

Facilities Planning and Construction: Oversee and manage the development of school facility renovation and new construction ensuring conformance with contract documents and compliance with provisions of the public contract code and bid requirements. Facilitate the construction process so that planned renovation and new construction goals can be met.

REPRESENTATIVE DUTIES:

Purchasing and Warehouse

- Effectively plan, organize and supervise the Purchasing and Warehouse Departments.
- Supervise the cost effective acquisition, distribution, and management of supplies and equipment by Purchasing and Warehouse Department personnel.
- Review all purchase requisitions and claims for reimbursement for accuracy, verification of quote status, order specifications, authorizing signatures, and availability of funds.
- Review and prepare contract documents, formal quotes, and bid documents. Verify conformance with all legal standards.
- Schedule public bid openings; evaluate bid responses; review and approve bidder licenses and bonds. Prepare Public Notices, Notices of Award, Notices to Proceed, and formal contracts for the award of each bid.
- Arrange for the sale, public auction, disposal, or donation of District surplus or obsolete property.
- Maintain the District fixed asset inventory system. Coordinate identification and tagging of all items that are subject to tagging; recording of items in the inventory system; and performance of physical inventory.
- Supervise District warehouse operations including quality and quantity of stock, storage, receiving, shipping and delivery to all school sites.
- Assist in establishing purchasing policies and procedures.
- Prepare annual purchasing calendar.
- Prepare and monitor budget for purchasing and warehouse departments.
- Supervise order, receipt, storage, and distribution of government commodity foods.
- Related duties as assigned.

Facilities Planning and Construction

- Responsible for the facilitation and support of all District construction projects including those outlined in the master facilities plan as described in the General Obligation Bond. *E*
- Prepare and maintain a master project schedule. *E*
- Review and distribute architect/engineering cost estimates and construction documents. *E*
- Work with architect to implement approved changes and revisions to existing plans. *E*
- Oversee construction projects and insure critical path is followed to completion. *E*
- Communicate and coordinate with the School Principals, Plant Managers, Director of Fiscal Services, Director of Facilities and Operations, Director of Information Services, and other district staff on construction planning, scheduling and impacts. *E*
- Review and analyze request for information (RFI). *E*
- Review and reconcile contractor payment applications; facilitate resolution. *E*
- Supervise construction managers and management firms. *E*
- Monitor budgets with Director of Fiscal Services and Director of Facilities and Operations. *E*
- Maintain construction project records to ensure cost containment. *E*
- Monitor all aspects of change orders; review contractor change order proposals, claims for increases in time, and budget with Assistant Superintendent of Business. *E*
- Maintain record retention, audits and organization of construction files. Collect and distribute closeout documents. *E*
- Work with Director of Facilities and Operations in analyzing and prioritizing both short and long-range plans. *E*
- Coordinate utility and service applications, installations and start-ups. *E*
- Oversee development and completion of punch list items. *E*
- Conduct daily/weekly site visits and report progress to Assistant Superintendent of Business. *E*
- Evaluate and recommend changes in scope of projects. *E*
- Perform various construction duties including contract administration, dispute resolution and change order processing. *E*
- Work with Director of Facilities and Operations to insure that general contract conditions, specifications and bids are completed properly. Monitor, inspect, consult and advise on construction site activities; insure timely completion of projects and resolve issues and conflicts. *E*
- Perform as liaison with regulatory agencies at state and local levels, as necessary, to ensure compliance with all design and building codes. *E*
- Prepare, maintain and analyze required records, reports, data and statistics. *E*
- Complete the appropriate paperwork required for state matching funds. *E*
- Coordinate contractors and inspection agencies during construction.
- Related duties as assigned.

KNOWLEDGE OF:

Construction management methods.

Architectural methods and techniques.

Specifications, contracts, and market conditions

Techniques and methods of product evaluation.

Purchasing and inventory control practices and procedures.

Operation of a computer terminal and data entry techniques.

Oral and written communication skills.

Research methods and report writing techniques.

Laws, rules and regulations related to assigned activities.

Applicable sections of the Education Code, Public Contract Code, etc.

ABILITY TO:

Coordinate major construction projects.

Meet schedules and timelines.

Communicate effectively, both orally and in writing, in a clear and concise manner.

Establish and maintain cooperative and effective working relationships with staff and employees from other agencies.

Maintain records and prepare reports.

Plan, prioritize and schedule work.

Maintain current knowledge of technological advances in the construction and purchasing field.

Analyze situations accurately and adopt an effective course of action.

EDUCATION & EXPERIENCE:

BA/BS Degree from an accredited college or university with major course work in public administration, business administration, engineering, architecture, or a related field required.

Education and/or training in the field of purchasing and material control are also desirable.

Minimum of three (3) years of experience as a representative of an architectural, engineering or private contracting firm providing technical construction management on major public works building projects required. Alternatively, three (3) years experience as a representative of a public entity administering public works construction projects required. And a minimum of three (3) years of increasingly responsible purchasing and inventory control experience including at least two years of supervisory and/or administrative experience.

LICENSES AND OTHER REQUIREMENTS:

- Valid California driver's license.

WORKING CONDITIONS:

- Indoor and outdoor work environment.
- Subject to noise from equipment operation.
- Regular exposure to fumes, dust, dirt, oil, and/or grease.
- Driving a vehicle to conduct work.

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, and lifting heavy objects to conduct inspections.

03/12/12
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