

Memo

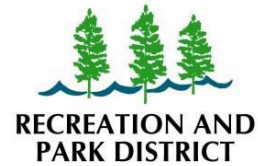
To: Advisory Board of Directors

From: Stacey Yankee, District Administrator
Matt Lemcke, Administrative Services Manager

Date: July 16, 2026

Subject: Conflict of Interest Code

Carmichael



Introduction/Background:

In February 1977, the District Advisory Board of Directors submitted a Conflict of Interest Code for the Carmichael Recreation and Park District, which was adopted on March 21, 1977 by the County of Sacramento Board of Supervisors, the code reviewing body for the District. Mandatory by all public agencies, a Conflict of Interest Code designates which positions are required to complete a Statement of Economic Interest (Form 700) and the financial interests that must be disclosed on the (Form 700). This original document was updated in November of 2014 to reflect significant changes in the District.

The Fair Political Practices Commission recommends consideration of the following issues to determine if an amendment may be necessary:

- Current Code is more than five years old.
- Substantial changes to the organizational structure of the agency have occurred.
- Positions have been eliminated or re-named.
- New Positions have been added.
- Substantial changes in duties or responsibilities have occurred.

Staff have reviewed the 2014 Conflict of Interest Code and made minor updates to account for additional staff positions, and updates to the Form 700. Changes are red lined.

Discussion:

The changes are as follows:

Section III – Designated Positions.

- Added Administrative Analyst
- Updated Maintenance Supervisor title to Lead Worker

Appendix 1

- Added Administrative Analyst
- Updated Maintenance Supervisor title to Lead Worker
- Changed Disclosure Categories from numbers to letters to correspond with the updated Form 700 Schedules.
- Updated the Disclosure Category Descriptions to match the most recent Form 700 Schedules.
- Updated the “note” to remove “Advisory Board of Directors” as the Appendix refers to District staff.

Financial Impact:

There is no financial impact to the District with this change.

Future Steps:

Upon approval by the Board of Directors, the updated Conflict of Interest Code will be sent to the Sacramento County Board of Supervisors for final approval. Current staff will be updated on their requirements by the Administrative Services Manager.

Recommendation:

Staff recommends that the Carmichael Recreation and Park District Advisory Board of Directors approve the updated Conflict of Interest Code and direct that it be submitted to the County Board of Supervisors for final approval and adoption.

Conflict of Interest Code
for
Carmichael Recreation and Park District
A Dependent District

I.

Adoption

In compliance with the Political Reform Act of 1974, California Government Code §81000, et seq., the Carmichael Recreation and Park District hereby adopts the Conflict of Interest Code, which shall be applicable to all designated employees of the Carmichael Recreation and Park District as specifically required by California Government Code § 87300 and incorporates by reference, Title 2 California Code of Regulations 18730. The provisions are subject to change and may be amended by legislation or regulation.

This Code has the force and effect of law. Designated employees violating this Code are subject to the administrative, criminal, and civil sanctions provided in the Political Reform Act, Government Code § 81000-91014, et seq.

II.

Designated Employees

Government Code § 87302 (a) requires that persons including governing board members who occupy positions within the Carmichael Recreation and Park District which involve the making or participation in the making of decisions which may foreseeably have a material effect on any financial interest shall be a designated employee. All persons who hold the positions enumerated in Section III, below, are designated employees and must disclose all economic interests set forth in the Disclosure Categories in Appendix 1.

III.

Designated Positions

Persons occupying the following positions are designated employees and must disclose economic interests set forth in the Disclosure Categories in Appendix 1. The manner of reporting reportable items shall be as provided by Government Code § 87200:

- 1) Advisory Board of Directors
- 2) District Administrator
- 3) Recreation Services Manager
- 4) Park Services Manager
- 5) Administrative Services Manager
- 5)6) Administrative Analyst
- 6)7) Recreation Supervisor
- 7)8) Maintenance Supervisor Lead Worker

IV.

Statement of Economic Interests – Filing

Upon request, any filer who would like assistance with filling out their statement may request assistance from County Counsel or the Fair Political Practices Commission.

A. Initial Statement

An initial statement shall be filed by each designated employee within 30 days after the effective date of this Conflict of Interest Code disclosing investments in business entities and interests in real property made reportable by Section III, above. All new designated employees shall file statements not less than ten days before assuming office or, if subject to confirmation, ten days before being confirmed, unless an earlier assumption of office is required by emergency circumstances. Government Code § 87302 (b).

B. Annual Statements

Thereafter, each designated employee shall file an annual statement, no later than April 30 of each calendar year disclosing reportable investments in business entities, interests in real property, and income held or received in the period since the closing date of the employee's previously filed statement and December 31st.

C. New Positions

Designated employees appointed, promoted or transferred to designated positions within the agency shall file initial statements disclosing reportable investments in business entities and interests in real property within 30 days after assuming office. Government Code § 87302 (b).

D. Leaving Office

Any designated employee whose employment with the Carmichael Recreation and Park District is terminated, voluntarily or involuntarily, shall, within 30 days after termination, file a statement disclosing investments in business entities, interests in real property, and income, covering the period between the closing date of the previous statement of economic interests and the termination date.

E. Filing with the Agency

The statements shall be filed with the person acting as the filing officer for the agency, for the Advisory Board of Directors the filing officer is the County of Sacramento Clerk of the Board of Supervisors for all other designated employees (District Staff) the filing officer is the Administrative Services Manager.

Such statements are public records subject to Government Code Section 81008. Filings by the Advisory Board of Directors will be available at the County of Sacramento, County Administration Building, Clerk of the Board, 800 H Street, Suite 2450, Sacramento, CA 95814. Filings by District staff will be available at the Carmichael Recreation and Park District Office, 5750 Grant Ave., Carmichael, CA 95608.

V.

Manner of Reporting

The manner of reporting reportable interests shall made on forms prescribed by the Fair Political Practices Commission, currently referred to as a Form 700.

VI.

Disqualification

A designated employee must disqualify himself or herself from making or participating in the making of any decisions which will foreseeably have a material financial effect, distinguishable from its effect on the public generally, on any reportable economic interest or upon any business entity in which the designated employee holds

a position of management or is a director, officer, partner, sole owner, trustee, or employee. No member shall be prevented from making or participating in the making of any decision to the extent his or her participation is legally required for the decision to be made.

Any filer required to disqualify themselves shall give notice of disqualification in writing to the District Administrator. The District Administrator shall give written notice to the Chairman of the Advisory Board of Directors.

VII.

Definitions

Unless otherwise indicated, the definitions contained in the Political Reform Act of 1974, Government Code § 81000, et seq., the Regulations of the Fair Political Practices Commission adopted pursuant thereto, and any amendments to the Act and Regulations are incorporated into this Conflict of Interest Code. Copies of this Code, the Political Reform Act of 1974, and the Regulations of the Fair Political Practices Commission shall be on file with the filing officer. The filing officer shall supply each designated employee with an instruction manual and statement of economic interests forms.

VIII.

Effective Date of Code

This Conflict of Interest Code shall become effective upon the date of adoption by the County of Sacramento Board of Supervisors.

Appendix 1

Designated Positions and Disclosure Categories

CLASSIFICATION	DISCLOSURE CATEGORY
District Administrator	<u>A, B, C, D, E</u> 1, 2, 3, 4
Recreation Services Manager	<u>A, B, C, D, E</u> 1, 2, 3, 5, 6
Park Services Manager	<u>A, B, C, D, E</u> 1, 2, 3, 4, 5
Administrative Services Manager	<u>A, B, C, D, E</u> 1, 2, 3, 5, 6
Recreation Supervisor	<u>A, B, C, D, E</u> 5
Maintenance Supervisor <u>Lead Worker</u>	<u>A, B, C, D, E</u> 4, 5
<u>Administrative Analyst</u>	<u>A, B, C, D, E</u>

DISCLOSURE CATEGORY DESCRIPTIONS:

No.	Description
<u>A</u> 1	Business <u>All Investments and Income</u>
<u>B</u> 2	All business position in business affairs <u>Interests in Real Property</u>
<u>C</u> 3	All sources of income <u>within the District</u>
<u>4</u> D	All interests in real property <u>Gifts</u>
<u>5</u> E	All investments and business positions in business entities, and income from sources, that provide goods, services, including consulting services, facilities, equipment, or machinery of the type used by District. <u>Gifts and Reimbursements of a Travel nature</u>
<u>6</u>	All investments and business positions in business entities, and income from sources, that provide computer software, hardware, or peripherals of the type used by the District, and services, including consulting services, related to these items.

Please note: The ~~Advisory Board of Directors~~ disclosure categories and descriptions are designated by the County of Sacramento and the statements are filed with the Clerk of the Board of Supervisors.