



County of Sonoma

State of California

Date: July 22, 2025

Item Number: _____

Resolution Number: _____

☐ 4/5 Vote Required

Resolution Of The Board Of Supervisors Of The County Of Sonoma, State Of California, Approving the Conflict of Interest Code for the Assessment Appeals Board

Whereas, the Political Reform Act, Government Code section 81000 et seq. requires state and local government agencies to adopt conflict of interest codes; and

Whereas, state law requires every agency shall amend its conflict of interest code when change is necessitated by changed circumstances, including the creation of new positions which must be designated and relevant changes in the duties assigned to existing positions; and

Whereas, the Board of Supervisors is the code reviewing body for agencies within the geographic jurisdiction of the County, and charged with the responsibility of ensuring that the amended codes comply with law; and

Whereas, the Assessment Appeals Board has proposed an amendment to update its code to comply with state law; and

Whereas, County Counsel has reviewed the amended code and determined that it complies with the Political Reform Act; and

Now, Therefore, Be It Resolved, that the conflict of interest code of the Assessment Appeals Board is approved as amended. The Clerk is directed to send a copy of this resolution to the Assessment Appeals Board and County Counsel.

Supervisors:

Hermosillo:

Rabbitt:

Coursey:

Gore:

Hopkins:

Ayes:

Noes:

Absent:

Abstain:

So Ordered.

WHEREAS, the Political Reform Act, Government Code sections 81000 et seq., requires state and local government agencies to adopt conflict of interest codes, and

WHEREAS, the Fair Political Practices Commission has adopted a regulation, 2 Cal. Code of Regs. Section 18730, which contains the terms of a standard conflict of interest code and which can be incorporated by reference and may be amended by the Fair Political Practices Commission after public notice and hearings to conform to amendments to the Political Reform Act, and

WHEREAS, the Assessment Appeals Board wishes to adopt this standard code and designate which officers and employees should disclose financial interests and describe which interests must be disclosed, and

NOW, THEREFORE, BE IT RESOLVED THAT:

1. The terms of 2 Cal. Code of Regs. Section 18730 and any amendments to it duly adopted by the Fair Political Practices Commission are hereby incorporated by reference and, along with the attached Appendix A and Appendix B, in which members and employees are designated and disclosure categories are set forth, constitute the Conflict of Interest Code of the Assessment Appeals Board and

2. Pursuant to Section 4 of the standard code, board members shall file statements of economic interest with the Assessment Appeals Board Clerk, who shall retain a copy and forward the original for filing with the Clerk of the Sonoma County Board of Supervisors. Designated employees shall file statements with the District clerk who shall retain them at the main place of business of the District. Any District board member or other designated employee already required to submit a disclosure statement (Form 700) pursuant to Government Code section 87203 may submit a copy of that statement in lieu of any filing required by this code provided that no additional disclosure would be required by this code.

APPENDIX A

<u>Designated Positions</u>	<u>Disclosure categories</u>
Assessment Appeals Board Members	1, 2, 3
Assessment Appeals Board Alternate Members	1, 2, 3
Consultants	*

*Consultants 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:

The Chair may determine in writing that a particular consultant, although in 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 the disclosure requirements. The Chairman’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.

APPENDIX B

Disclosure Categories¹

Category 1: All investments, business positions and sources of income, including gifts, loans and travel payments; all interests in real property.

Category 2: All investments, business positions and income, including gifts, loans and travel payments, from sources that provide goods, equipment, vehicles, machinery or services, including training or consulting services, of the type utilized by the Assessment Appeals Board.

Category 3: Investments* and business positions in business entities, and income from sources, which provide services, supplies, materials, machinery or equipment of the type utilized by or provided by the employee's department or division.

* Only investments in and sources of income from business entities, and sources of income, which do business in Sonoma County, plan to do business in Sonoma County, or have done business in Sonoma County within the past two years should be reported. In addition to other activities, a business entity is doing business within Sonoma County if it owns **real property** within the County.

** Interests in real property which is located in whole or in part within or not more than two miles outside the boundaries of Sonoma County or within two miles of any land owned or used by Sonoma County, or investments in business entities, which buy and sell real property in Sonoma County.

Assessment Appeals Board

EXHIBIT "A"

<u>Designated Positions</u>	<u>Disclosure Categories</u>
** - Assessment Appeals Board Members	1, 2, 3
--including Alternates--	
Assessment Appeals Board Alternate Members	1,2,3
**File with Board of Supervisors (eff. 2/2013)	
Consultants	*

*Consultants 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:

The Chair may determine in writing that a particular consultant, although in 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 the disclosure requirements. The Chairman'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.

EXHIBIT "B"

Category 1. **Replace outdated disclosure category language with current taken from FPPC Disclosure Category reference .**

Persons in this category shall disclose all interests in real property within the jurisdiction. Real property shall be deemed to be within the jurisdiction if the property or any part of it is located within or not more than two miles outside the boundaries of the jurisdiction or within two miles of any land owned or used by the local government agency.

"'Interest in real property' includes any leasehold, beneficial or ownership interest or an option to acquire such an interest in real property located in the jurisdiction if the fair market value of the interest is greater than one thousand dollars (\$1,000). Interests in real property of an individual includes a pro rata share of interests in real property of any business entity or trust in which the individual or spouse owns, directly, indirectly or beneficially, a ten percent interest or greater." (Govt. Code Section 82033)

Persons shall not be required to disclose property used primarily as their residence or for personal recreational purposes.

Category 2. **Replace outdated disclosure category language with current taken from FPPC Disclosure Category reference .**

Persons in this category shall disclose all investments

"'Investment' means any financial interest in security issued by a business entity, including, but not limited to common stock, preferred stock, rights, warrants, options, debt instruments and any partnership or other ownership interest, in which the business entity or any parent, subsidiary or otherwise affiliated business entity has an interest in real property within the jurisdiction, or does business or plans to do business within the jurisdiction, or has done business within the jurisdiction at any time during the two years prior to the time any statement or other action is required under this title. No asset shall be deemed an investment unless its fair market value exceeds one thousand dollars (\$1,000). The term 'investment' does not include a deposit or demand deposit in a financial institution, a share in a credit union, any insurance policy, or a bond or other instrument issued by any government or government agency. Investments of an individual include a pro rata share of investments of any business entity or trust in which the individual or spouse owns, directly, indirectly or beneficially, a ten percent interest or greater . . ." (Government Code Section 82034)

Category 3. **Replace outdated disclosure category language with current taken from FPPC Disclosure Category reference.**

Persons in this category shall disclose all income received from any source located or doing business within the jurisdiction or planning to do business within the jurisdiction.

"(a) 'Income' means, except as provided in subsection (b), income of any nature from any source, including but not limited to salary, wage, advance, payment, dividend, interest, capital gain, return of capital, gift, including gift of food or beverage, loan forgiveness, income from indebtedness, discount in the price of anything, unless the discount is available to members of the public without regard to official status, reimbursement for expenses, per diem, or contribution to an insurance or pension program paid by any person other than an employer, and including any community property interest in income of a spouse. Income of an individual also includes a pro rata share of any income of a business entity or trust in which the individual or spouse owns, directly or indirectly or beneficially, a 10-percent interest or greater. 'Income,' other than gift, does not include income received from any source outside the jurisdiction and not doing business within the jurisdiction, not planning to do business within the jurisdiction, or not having done business within the jurisdiction during the two years prior to the time any statement or other action is required under this title.

"(b) 'Income' also does not include:

"(1) Campaign contributions required to be reported under Chapter 4 of this title.

"(2) Salary and reimbursement of expenses or per diem received from a state or local government agency and reimbursement for travel expenses and per diem received from a federal, educational, academic or charitable organization.

"(3) Gifts of informational material, such as books, pamphlets, reports, handbooks or periodicals;

"(4) Gifts which are not accepted and which, within 30 days after receipt, are returned to the donor or delivered to a charitable organization without being accepted as a charitable contribution for tax purposes.

"(5) Gifts from an individual's child, grandchild, grandparent, grandchild, sister, sister-in-law, brother-in-law, sister-in-law, aunt, uncle, or first cousin or the spouse of

any such person; provided that a gift from any such person shall be considered income if the donor is acting as an agent or intermediary for any person not covered by this paragraph;

"(6) Any dividend or interest;

"(7) Interest, dividends or premiums on a time or demand deposit in any financial institution, shares in a credit union, any insurance policy, payments received under any insurance policy, or any bond or other debt instrument issued by any government or governmental agency;

"(8) Dividend, interest, or other return on a security which is registered with the Securities and Exchange Commission of the United States government;

Income aggregating less than two hundred and fifty dollars (\$250) in value, or less than twenty-five dollars in value if the income was a gift, need not be disclosed.

Category 4. Removal of category 4, not listed as one of the required categories for any position within COIC.

Persons in this category shall disclose all income from and investments in businesses that provide or sell services or supplies of the type associated with job assignment and utilized by the Department.

See the definition of "investment" in Category 2 and the definition of "income" in Category 3.

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** Interests in real property which is located in whole or in part within or not more than two miles outside the boundaries of Sonoma County or within two miles of any land owned or used by Sonoma County, or investments in business entities, which buy and sell real property in Sonoma County.