

# 2018 Local Agency Biennial Notice

Name of Agency: Elevate School  
Mailing Address: 2285 Murray Ridge Road, San Diego 92123  
Contact Person: Ryan Elliott Phone No. 858-751-4774  
Email: relliott@elevateschool.com Alternate Email: jsoule@elevateschool.com

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 includes disclosure by those 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:

(Check all that apply.)

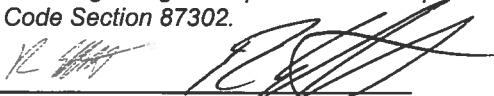
- Include new positions
- Revise disclosure categories
- Revise the titles of existing positions
- Delete titles of positions that have been abolished and/or positions that no longer make or participate in making governmental decisions
- Other (describe) \_\_\_\_\_

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

No amendment is required. (If your code is over five years old, amendments may be necessary.)

## Verification (to be completed if no amendment is required)

*This agency's code accurately designates all positions that make or participate in the making of governmental decisions. The disclosure assigned to those positions accurately requires that 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 designated positions are reported. The code includes all other provisions required by Government Code Section 87302.*

  
\_\_\_\_\_  
Signature of Chief Executive Officer

9-24-2018

\_\_\_\_\_  
Date

All agencies must complete and return this notice regardless of how recently your code was approved or amended. Please return this notice no later than **October 1, 2018**, or by the date specified by your agency, if earlier, to:

Clerk of the Board of Supervisors  
Attn: Biennial Review  
1600 Pacific Highway, Room 402  
San Diego, CA 92101

**PLEASE DO NOT RETURN THIS FORM TO THE FPCC.**

[www.fpcc.ca.gov](http://www.fpcc.ca.gov)

FPCC Advice: [advice@fpcc.ca.gov](mailto:advice@fpcc.ca.gov) (866.275.3772)

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2018 OCT 1 1 30 PM 3:09  
COUNTY OF SAN DIEGO

Approved and/or authorized by the Board of Supervisors of the County of San Diego.	
Meeting Date: <u>12/11/2018</u>	Minute Order No. <u>41</u>
By: <u>[Signature]</u>	Date: <u>12/11/2018</u>
Deputy Clerk of the Board Supervisors	

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COUNTY OF SAN DIEGO  
2018 SEP 26 PM 2: 36

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CLERK OF THE BOARD  
OF SUPERVISORS

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## **ELEVATE SCHOOL**

### **CONFLICT OF INTEREST CODE**

#### **I. ADOPTION**

In compliance with the Political Reform Act of 1974, California Government Code Section 87100, et seq., Elevate School, a California nonprofit public benefit corporation, adopts this Conflict of Interest Code (“Code”), which shall apply to all board members, and all other designated employees of Elevate School, and Elevate Elementary, the public charter school it operates (“Charter School”), as required by California Government Code Section 87300.

#### **II. DEFINITION OF TERMS**

As applicable to a California public charter school, the definitions contained in the Political Reform Act of 1974, the regulations of the Fair Political Practices Commission, specifically California Code of Regulations Section 18730, and any amendments or modifications to the Act and regulations are incorporated by reference to this Code.

#### **III. DESIGNATED REPORTERS**

Board members and employees who hold positions that involve the making or participation in the making, of decisions that may foreseeably have a material effect on any financial interest, shall be “Designated Reporters.” The Designated Reporters are listed in “Exhibit A” attached to this policy and incorporated by reference.

#### **IV. STATEMENT OF ECONOMIC INTERESTS: FILING**

Each Designated Reporter shall file a Statement of Economic Interest (“Statement”) at the time and manner prescribed by California Code of Regulations, Title 2, Section 18730, disclosing reportable investments, interests in real property, business positions, and income required to be reported under the category or categories to which the employee’s position is assigned in Exhibit A.

An investment, interest in real property or income shall be reportable, if the business entity in which the investment is held, the interest in real property, the business position, or source of income may foreseeably be affected materially by a decision made or participated in by the designated employee by virtue of his or her position. The specific financial disclosure responsibilities assigned to each Designated Reporter are set forth in Exhibit B.

Filing of Annual Statements. All Statements shall be supplied by the Charter School. All Statements shall be filed with the Charter School. The Charter School's filing officer shall make and retain a copy of the Statement and forward the original to the San Diego County Board of Supervisors.

## **V. DISQUALIFICATION**

No Designated Reporter shall make, participate in making, or try to use his/her official position to influence any Charter School decision which he/she knows or has reason to know will have a reasonably foreseeable material financial effect, distinguishable from its effect on the public generally, on the Designated Reporter or a member of his or her immediate family.

## **VI. MANNER OF DISQUALIFICATION**

### **A: Designated Reporters Who are NOT Board Members**

When a Designated Reporter who is not a Board member determines that he/she should not make a decision because of a disqualifying interest, he/she should submit a written disclosure of the disqualifying interest to his/her immediate supervisor. The supervisor shall immediately reassign the matter to another employee and shall forward the disclosure notice to the CEO, who shall record the employee's disqualification. In the case of a conflict involving the CEO, this determination and disclosure shall be made in writing to the Board.

### **B: Board Member Designated Reporters**

Board members shall disclose a disqualifying interest at the meeting during which consideration of the decision takes place. This disclosure shall be made part of the Board's official record. The Board member shall refrain from participating in the decision in any way (i.e., the Board member with the disqualifying interest shall refrain from voting on the matter and shall leave the room during Board discussion and when the final vote is taken) and comply with any applicable provisions of the Charter School bylaws.

**EXHIBIT A**

**DESIGNATED REPORTERS**

<b>Designated Position</b>	<b>Assigned Disclosure Category</b>
Governing Board Members	1, 2, 3
Chief Executive Officer (CEO)	1, 2, 3
Business Manager	1, 2, 3
Consultants/New Positions	*

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

The CEO may determine in writing that a particular consultant or new position, 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 in this section. Such written determination shall include a description of the consultant's or new position's duties and, based upon that description, a statement of the extent of disclosure requirements. The CEO'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. (Govt. Code§ 81008.)

**EXHIBIT B**  
**DISCLOSURE CATEGORIES**

**Category 1**

Designated positions assigned to this category must report:

- a. Interests in real property which are located in whole or in part within the boundaries (and a two mile radius) of the San Diego Unified School District.
- b. Investments in, income (including gifts, loans, and travel payments), from, and business positions in any business entity of the type which engages in the acquisition or disposal of real property or are engaged in building construction or design.

**Category 2**

Designated positions assigned to this category must report:

Investments in, income (including gifts, loans, and travel payments), from, and business positions in any business entity of the type which engages in the manufacture, sale, repair, rental or distribution of school supplies, books, materials, school furnishings or equipment to be utilized by the Charter School, its parents, teachers and students for educational purposes. This includes, but is not limited to, educational supplies, textbooks and items used for extracurricular courses.

**Category 3**

Designated positions assigned to this category must report:

Investments in, income (including gifts, loans, and travel payments), from sources which are engaged in the performance of work or services of the type to be utilized by the Charter School, its parents, teachers and students for educational purposes. This includes, but is not limited to, student services commonly provided in public schools such as speech therapists and counselors.

## **V. DISQUALIFICATION**

No Designated Reporter shall make, participate in making, or try to use his/her official position to influence any Charter School decision which he/she knows or has reason to know will have a reasonably foreseeable material financial effect, distinguishable from its effect on the public generally, on the Designated Reporter or a member of his or her immediate family.

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