

CONFLICT OF INTEREST CODE

Purpose

The purpose of this regulation is to outline what is required for compliance with the "conflict of interest/disclosure provision" of the Political Reform Act of 1974.

The conflict of interest provisions set forth in Chapter 7 of the California Political Reform Act of 1974 ("Political Reform Act") prohibit any public officer or employee from making, participating in making, or influencing any district decision in which he/she has a financial interest. The Act also requires that certain officers and employees of the district disclose their financial interests. The district is required to adopt a conflict of interest code that has the force of law and contains the following provisions:

1. A designation of those positions within the district which involve the making of or participation in the making of decisions that may foreseeably have a material effect on the financial interests of the person holding the position;
2. For each such position, the specific types of investments, business positions, interests in real property and sources of income which must be disclosed; and

The circumstances under which individual, or categories of, designated employees must disqualify themselves from making or participating in the making of any decision that may foreseeably have a material effect on the financial interest of the person holding the position.

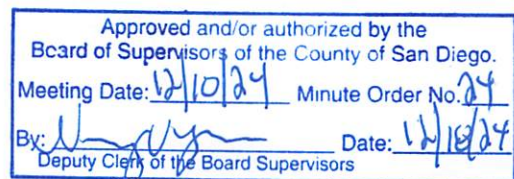
Penalties for Violation of Code

This Conflict of Interest Code has the force of law. Any violation hereof may constitute a misdemeanor with specified penalties depending on the nature of the infraction.

All provisions of the Political Reform Act of 1974, regulations of the Fair Political Practices Commission, specifically 2 California Code of Regulations Section 18730, and any amendments to the Act or regulations, not otherwise modified into this conflict of interest code, are incorporated by reference into this conflict of interest code.

Definitions

1. Designated Positions and Designated Employees: Those persons holding positions listed in Exhibit (1) 3700 are Designated Employees. These are persons make or participate in the making of decisions that may foreseeably have a material effect on financial interests.
2. Disclosure Categories: The disclosure categories set forth in Exhibit (2) 3700 specify which kinds of financial interests are reportable by a Designated Employee. Each Designated Employee is required to disclose in his or her statement of economic interests those financial interests he or she has which are of the kind described in the disclosure categories to which he or she is assigned in Exhibit (2) 3700. The financial interests set forth in a designated employee's disclosure categories are the kinds of financial interests that he/she foreseeably can affect materially through the conduct of his/her office.
3. The definitions, not otherwise modified in this conflict of interest code, contained in the Political Reform Act of 1974, regulations of the Fair Political Practices Commission, and any amendments to the Act or regulations, are incorporated by reference into this conflict of interest code.



Responsibilities

1. Designated employees shall file disclosure statements and disqualify themselves from making decisions in accordance with the information below.
2. Division heads shall assist the Legal Services Office in determining which positions under their supervisory authority shall be required to file statements of economic interests. New positions to be added to the list should be forwarded to the Legal Services Office.
3. Any management employee employing a consultant or establishing a committee shall determine, in consultation with the Legal Services Office, whether the consultant or committee members will be required, depending on the nature of the assignment, to file a statement of economic interests. *For consultants*, such determination shall be noted on a "Consultant Service Request" form. Designations of *permanent committees* whose members must file statements of economic interests shall be forwarded to the Legal Services Office for inclusion on Exhibit (1) 3700.

Place of Filing Statements of Economic Interests

1. Members of the Board of Education and the Superintendent of Public Education shall file a statement of economic interests electronically with the San Diego County Board of Supervisors through the eDisclosure portal. If they do not file electronically, the original statement for board members and the Superintendent of Public Education will be provided to the Legal Services Office who will forward the originals to the clerk of the San Diego County Board of Supervisors. In either event, a copy will be retained in the files of the Legal Services Office. The Legal Services Office shall be responsible for follow-up to ensure compliance with filing requirements.
2. Designated employees shall file the original of the statement of economic interests with the Legal Services Office.
3. Candidates for election to the Board of Education shall file a statement of economic interests with the San Diego County Registrar of Voters.

Time of Filing and Contents of Statements of Economic Interests

1. Initial statements
 - a. Members of the Board of Education and all designated employees employed by the district on the effective date of this code, as originally adopted, promulgated and approved by the San Diego County Board of Supervisors, shall file statements within 30 days after the effective date of this code. Thereafter, each person already in a position when it is designated by an amendment to this code shall file an initial statement within 30 days after the effective date of the amendment.
 - b. Statements shall disclose any reportable investments, interests in real property and business positions held on the effective date of the code and income received during the 12 months prior to the effective date of the code.
2. Assuming office statements
 - a. Members of the Board of Education and all persons assuming designated positions after the effective date of this code shall file statements within 30 days after assuming office or the designated positions.
 - b. Members of the Board of Education and all persons who assume a district office or designated position within 30 days after leaving another district office or designated position are not required to file an assuming office statement.

- c. Statements shall disclose any reportable investments, interests in real property and positions held on the date of assuming office, and income received during the 12 months prior to the date of assuming office.
- 3. Annual statements
 - a. Members of the Board of Education and all designated employees shall file statements no later than April 1.
 - b. Members of the Board of Education and all persons assuming office between October 1 and December 31, and who have properly filed an assuming office statement, are not required to file the next annual statement, but will do so the following year.
 - c. Statements shall disclose any reportable investments, interest in real property, income and business positions held or received during the previous calendar year provided, however, that the period covered by an employee's first annual statement shall begin on the effective date of the code or the date of assuming office whichever is later.
- 4. Leaving office statements
 - a. Members of the Board of Education and all designated employees who leave office or designated positions shall file statements within 30 days after leaving office.
 - b. Members of the Board of Education and all persons who leave a district office or designated position only to assume another district office or designated position within 30 days are not required to file a leaving office statement.
 - c. Statements shall disclose reportable investments, interests in real property, income and business positions held or received during the period between the closing date of the last statement filed and the date of leaving office.
- 5. A person who is a candidate for election to the Board of Education shall file a statement of economic interests with the Registrar of Voters no later than the time of filing declaration of candidacy.
- 6. Statements for persons who resign prior to assuming office. Any person who resigns within 12 months of initial appointment, or within 30 days of the date of notice provided by the Legal Services Office to file an assuming office statement, is not deemed to have assumed office or left office, provided he or she did not make or participate in the making of, or use his/her position to influence any decision and did not receive or become entitled to receive any form of payment as a result of his/her appointment. Such person shall not file either an assuming or leaving office statement. Any person who resigns a position within 30 days of the date of a notice from the Legal Services Office shall do both of the following:
 - a. File a written resignation with the district; and
 - b. File a written statement with the Legal Services Office declaring under penalty of perjury that during the period between appointment and resignation he/she did not make, participate in the making, or use the position to influence any decision of the district or receive, or become entitled to receive, any form of payment by virtue of being appointed to the position.
- 7. A designated employee who is required to disclose any interest in real property shall file a supplementary statement disclosing any partially or wholly newly acquired or disposed of reportable interest in real property within 30 days of that acquisition or disposal.

Manner of Reporting

Statements of economic interests shall be made on forms prescribed by the Fair Political Practices Commission and supplied by the Legal Services Office. All statements shall include information concerning reportable investments, interests in real property, income and business positions held or received in accordance with 2 California Code of Regulations Section 18730(b)(7).

Prohibition on Receipt of Honoraria

No member of the Board of Education or designated employee shall accept any honorarium from any source, if the member or employee would be required to report the receipt of income or gifts from that source on his/her statement of economic interests. Government Code Section 89501 shall apply to the prohibitions on receipt of honoraria. This section shall not limit or prohibit payments, advances, or reimbursements for travel and related lodging and subsistence authorized by Government Code Section 89506.

Prohibition on Receipt of Gifts

No member of the Board of Education or designated employee shall accept gifts with a total value of more than the limit established each year pursuant to 2 California Code of Regulations 18730 in a calendar year from any single source, if the member or designated employee would be required to report the receipt of income or gifts from that source on his/her statement of economic interests. Government Code Section 89503 shall apply to the prohibitions on receipt of honoraria.

Loans to Members of the Board of Education

1. No member of the Board of Education shall, from the date of his/her election to office through the date that he/she vacates office, receive a personal loan from any officer, employee, member or consultant of the district.
2. No member of the Board of Education shall, from the date of his/her election to office through the date that he/she vacates office, receive a personal loan from any person who has a contract with the district. This subdivision shall not apply to loans made by banks or other financial institutions or to any indebtedness created as part of a retail installment or credit card transaction, if the loan is made or the indebtedness created in the lender's regular course of business on terms available to members of the public without regard to the Board of Education member's official status.
3. No member of the Board of Education shall, from the date of his/her election to office through the date that he/she vacates office, receive a personal loan of \$500.00 or more, except when the loan is in writing and clearly states the terms of the loan, including the parties to the loan agreement, date of the loan, amount of the loan, term of the loan, date or dates when payments shall be due on the loan and the amount of the payments, and the rate of interest paid on the loan.
4. This section shall not apply to the following:
 - a. Loans made to the campaign committee of the member of the Board of Education or candidate for member of the Board of Education.
 - b. Loans made by a Board of Education member's spouse, child, parent, grandparent, grandchild, brother, sister, parent-in-law, brother-in-law, sister-in-law, nephew, niece, aunt, uncle, or first cousin, or the spouse of any such person, provided that the person making the loan is not acting as an agent or intermediary for any person not otherwise exempt under this section.
 - c. Loans from a person, which, in the aggregate, do not exceed \$500.00 at any given time.

- d. Loans made, or offered in writing, before January 1, 1998.
- e. Nothing in this section shall exempt any person from any other provision of Title 9 of the Government Code.

Personal Loans Received by Designated Employees

Personal loans received by designated employees may be considered gifts, under 2 California Code of Regulations Section 18730(b)(8.4), for purposes of reporting them on the statement of economic interests.

Disqualification

No member of the Board of Education or designated employee shall make, participate in making, or in any way attempt to use his/her official position to influence the making of any government decision that 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 member of the Board of Education or designated employee, or a member of his or her immediate family, or on:

- 1. Any business entity in which he or she has a direct or indirect investment worth \$2,000.00 or more.
- 2. Any real property in which he or she has a direct or indirect interest worth \$2,000.00 or more.
- 3. Any source of income, other than gifts and other than loans by a commercial lending institution in the regular course of business on terms available to the public without regard to official status, aggregating \$500.00 or more in value provided to, received by or promised to the designated employee within 12 months prior to the time when the decision is made.
- 4. Any business entity in which he/she is a director, officer, partner, trustee, employee, or holds a position of management.
- 5. Any donor or, or any intermediary or agent for a donor of, a gift or gifts aggregating \$470.00 or more provided to, received by, or promised to the designated employee within 12 months prior to the time when the decision is made.

Manner of Disqualification

- 1. Designated employees. A designated employee required to disqualify himself or herself shall notify his/her supervisor in writing. This notice shall be forwarded to the Legal Services Office, which shall record the employee's disqualification. Upon receipt of such statement, the supervisor shall immediately reassign the matter to another employee.
- 2. Member of the Board of Education. In case of a designated employee who is a member of the board, notice of disqualification shall be given at the meeting during which consideration of the decision takes place and shall be made part of the official record of the board. The member then shall refrain from participating and shall attempt in no way to use his/her official position to influence any other person with respect to the matter.

Legally Required Participation

No member of the Board of Education or designated employee 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. The fact that the vote of a member of the Board of Education or designated employee who is on a voting body is needed to break a tie does not make his/her participation legally required for purposes of this section.

Assistance of the Commission

Any designated employee who is unsure of his/her duties under this code may request assistance from the Fair Political Practices Commission pursuant to Government Code Section 83114.

Legal Reference:

Political Reform Act of 1974

California Government Code Sections 83000 et. seq., and 89000 et. seq.

2 California Code of Regulations Section 18000 et. seq.

Policy

adopted: January 26, 2021

SAN DIEGO UNIFIED SCHOOL DISTRICT

San Diego, California

CATEGORIES OF REPORTABLE ECONOMIC INTERESTS

CATEGORY 1 ALL-INCLUSIVE REPORTABLE INVESTMENTS (See Government Code § 82034)

A designated employee in this category shall disclose all reportable investments (worth more than \$1,000):

- (a) owned by the designated employee, his or her spouse or dependent child;
- (b) owned by an agent on behalf of the designated employee;
- (c) owned by any business entity controlled by the designated employee (i.e., any business entity in which the designated employee, her or her agents, spouse and dependent children have a present or future interest worth more than \$1,000);
- (d) representing the pro rata share (worth more than \$1,000) of the designated employee, his or her spouse and dependent children, or investments of any business entity or trust in which the designated employee, his or her spouse, and dependent children own, directly, indirectly or beneficially, a 10 percent interest or greater;
- (e) this category includes, at a minimum, all sources of investments identified under Category 4.

CATEGORY 2 ALL-INCLUSIVE REPORTABLE INTEREST IN REAL PROPERTY

A designated employee in this category shall disclose all interests (worth more than \$1,000) in real property located within the jurisdiction if the interests are:

- (a) held or own by the designated employee, his or her spouse and dependent child, or
- (b) the pro rata share (worth more than \$1,000) of interests in real property of any business entity or trust in which the designated employee or spouse owns, directly, indirectly, or beneficially, a 10 percent interest or greater.

CATEGORY 3 ALL-INCLUSIVE REPORTABLE INCOME (See Government Code § 82030)

A designated employee in this category shall disclose all income of the designated employee from any Agency-related source aggregating \$250 or more (or \$50 more in the case of gifts) during the reporting period. This category includes, at a minimum, all sources of income identified under Category 5.

CATEGORY 4 LESS INCLUSIVE REPORTABLE INVESTMENTS (See Government Code § 82030)

A designated employee in this category shall disclose only investments (worth more than \$1,000) in any business entity, which within the last two years has contracted with or in the future may foreseeably contract with the Agency for the provision of the following services, supplies, materials, machinery, or equipment:

- (a) Selling or leasing audio-visual equipment, articles, or suppliers;
- (b) Publishing, selling, or leasing books, instructional or curriculum material;
- (c) Selling or leasing equipment, articles or supplies which can be used in connection with repairing or maintaining of buildings of grounds;
- (d) Selling or leasing transportation equipment, articles, supplies, or services;
- (e) Performing employment agency or recruitment services;
- (f) Selling or leasing equipment, articles, supplies or foods which can be used in connection with electronic data processing;
- (g) Selling or leasing equipment, articles or supplies which can be used in connection with electronic data processing;
- (h) Providing management consultant services;
- (i) Providing educational consultant services;
- (j) Selling or providing insurance or insurance services of any kind;
- (k) Providing medical, dental or psychological services either individually or as a part of a clinic or partnership, including medical or dental laboratory services;
- (l) Selling plants, garden or landscape supplies, sprinkling systems, sprinkling equipment or parts providing landscaping services of any kind;
- (m) Engaging in a specific business activity identified in Exhibit A as applicable to a specific designated position or category of positions;
- (n) Providing services of any kind to special education students.

CATEGORY 5 LESS-INCLUSIVE REPORTABLE INCOME

A designated employee in this category shall disclose only that reportable income (\$250 or more during reporting period, \$50 or more in the case of gifts) which is derived from a source which within the last two years has contracted with the Agency or in the future may foreseeably contract with the Agency for the provision of the following services, supplies, materials, machinery or equipment:

- (a) Selling or leasing audio-visual equipment, articles, or supplies;
- (b) Publishing, selling, or leasing books, instructional or curriculum material;
- (c) Selling or leasing equipment, articles or supplies which can be used in connection with repairing or maintaining of buildings or grounds;
- (d) Selling or leasing transportation equipment, articles, supplies, or services;
- (e) Performing employment agency or recruitment services;
- (f) Selling or leasing equipment, articles, supplies or foods which can be used in connection with electronic data processing;
- (g) Selling or leasing equipment, articles or supplies which can be used in connection with electronic data processing;
- (h) Providing management consultant services;
- (i) Providing educational consultant services;
- (j) Selling or providing insurance or insurance services of any kind;
- (k) Providing medical, dental or psychological services either individually or as a part of a clinic or partnership, including medical or dental laboratory services;
- (l) Selling plants, garden or landscape supplies, sprinkling systems, sprinkling equipment or parts providing landscaping services of any kind;
- (m) Engaging in a specific business activity identified in Exhibit A as applicable to a specific designated position or category of positions;
- (n) Providing services of any kind to special education students.

San Diego Unified School District

9/10/2024

EXHIBIT 1

DESIGNATED POSITIONS
(as of August 31, 2024)

COSD CLERK OF THE BOARD
2024 SEP 13 AM9:37

Position Title	Reportable Economic Interests Category Numbers (See Exhibit 2)
Administrator, Balboa Park Program	1, 2, 3
Administrator, Business Operations	1, 2, 3
Administrator, Food Services Compliance and Operations	1, 2, 3
Administrator on Special Assignment	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Administrator, Palomar Program	1, 2, 3
Application Development Coordinator	1, 2, 3
Area Program Manager, Special Education	4h, 4i, 4m, 4n, 5h, 5i, 5m, 5n
Area Superintendent	1, 2, 3
Assistant Area Superintendent (K-12)	1, 2, 3
Assistant General Counsel I and II	1, 2, 3
Audit Manager, Information Systems	1, 2, 3
Audit Manager, Operations	1, 2, 3
Board of Education Member	1, 2, 3
Business Manager, Food Services Dept	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Buyer	1, 2, 3
Candidates	1, 2, 3
Chief Police Services	1, 2, 3
Chief Public Information Officer	1, 2, 3
Chief Research and Evaluation Officer	1, 2, 3
Chief Special Projects Officer	1, 2, 3
Contract Specialist	1, 2, 3
Contracts Administration Supervisor	1, 2, 3
Controller	1, 2, 3
COVID-19 Response Coordinator	1, 2, 3
Deputy General Counsel and Labor Relations Counsel	1, 2, 3
Deputy Superintendent	1, 2, 3
Deputy Superintendent, Operations	1, 2, 3
Director, Advanced Placement Incentive Grant Program	1, 2, 3
Director, Advanced Studies & School Innovation	1, 2, 3
Director, Applications	1, 2, 3
Director, Assessment Services	1, 2, 3
Director, Board Services	1, 2, 3
Director, Budget Development	1, 2, 3
Director, Charter Schools Office	1, 2, 3
Director, Child Development Program	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Director, College, Career and Technical Education	1, 2, 3
Director, Communications	1, 2, 3
Director, Construction Management Department	1, 2, 3
Director, Counseling	1, 2, 3
Director, Due Process Hearings and Mediation	1, 2, 3
Director, Early Childhood Education	1, 2, 3
Director, Educational Complex	1, 2, 3
Director, Educational Technology	1, 2, 3
Director, Facilities Planning and Construction Special Projects	1, 2, 3
Director, Financial Planning, Monitoring and Accountability	1, 2, 3

Position Title	Reportable Economic Interests Category Numbers (See Exhibit 2)
Director, Fiscal Controls and Information Systems	1, 2, 3
Director, Food Services Department	1, 2, 3
Director, Government Relations	1, 2, 3
Director, Human Resources	1, 2, 3
Director, Integrated Technology	1, 2, 3
Director, Instructional Technology	1, 2, 3
Director, Instructional Data Support	1, 2, 3
Director, Labor Relations	1, 2, 3
Director, Leadership Development	1, 2, 3
Director, Neighborhood Schools & Enrollment Options	1, 2, 3
Director, Office of Language Acquisition	1, 2, 3
Director on Special Assignment	1, 2, 3
Director, Payroll/Benefits	1, 2, 3
Director, Physical Education, Health Education, Interscholastic Athletics, and Nursing and Wellness	4h, 4i, 4m, 5h, 5i, 5m
Director, Physical Plant Operations	1, 2, 3
Director, Planning and Accountability	1, 2, 3
Director, Professional Development for Admin. Support and Integrated Teams	1, 2, 3
Director, Professional Development for Instr. Support	1, 2, 3
Director, Project Management Department	1, 2, 3
Director, Purchasing and Contracts	1, 2, 3
Director, Real Estate	1, 2, 3
Director, Research and Development	1, 2, 3
Director, Risk Management	1, 2, 3
Director, School Choice	1, 2, 3
Director, School Innovation	1, 2, 3
Director, Science, Technology, Engineering & Mathematics (STEM)	1, 2, 3
Director, Special Education	1, 2, 3
Director, Special Projects	1, 2, 3
Director, Strategic Planning and Innovation, Office of the Superintendent	1, 2, 3
Director, Student Programs and Professional Learning	1, 2, 3
Director, Teaching and Learning Support	1, 2, 3
Director, Transportation and Distribution Services Department	1, 2, 3
Director, Visual and Performing Arts	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
District Architect	1, 2, 3
Executive Coordinator, Office of Superintendent	4h, 4i, 4m, 5h, 5i, 5m
Executive Director, Advanced Studies	1, 2, 3
Executive Director, Collaborative	1, 2, 3
Executive Director, Data Insights and System Support	1, 2, 3
Executive Director, Diversity and Inclusion	1, 2, 3
Executive Director, Equity and Belonging	1, 2, 3
Executive Director, Financial Planning and Development	1, 2, 3
Executive Director, Information Technology	1, 2, 3
Executive Director, Labor Relations and Assistant General Counsel	1, 2, 3
Executive Director, Leadership and Learning	1, 2, 3
Executive Director, Nursing and Wellness	1, 2, 3
Executive Director, Quality Assurance Office	1, 2, 3
Executive Director, Risk Management and Captive Insurance	1, 2, 3
Executive Director, School Innovation and Integrated Youth Services	1, 2, 3
Executive Director, Special Education	1, 2, 3

Position Title	Reportable Economic Interests Category Numbers (See Exhibit 2)
Executive Director, Strategic Communications and Information	1, 2, 3
Executive Director, Student Services	1, 2, 3
Executive Director, Youth Advocacy	1, 2, 3
Executive Principal	1, 2, 3
Food Services Planning Supervisor	1, 2, 3
General Counsel	1, 2, 3
Human Resources Officer	1, 2, 3
ISB Operations Coordinator	1, 2, 3
Legal Specialist	4h, 4i, 4m, 5h, 5i, 5m
Manager, Accounts Payable	1, 2, 3
Manager, Budget Development	1, 2, 3
Manager, Certificated Human Resources	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Manager, Charter Schools	1, 2, 3
Manager, Classified Personnel	1, 2, 3
Manager, Community Relations	1, 2, 3
Manager, Contracts Compliance	1, 2, 3
Manager, Custodial Services	4c, 4h, 4i, 5c, 5h, 5i
Manager, Elementary and Secondary Education Act	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Manager, Employee Benefits	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Manager, Enrollment Options	4b, 4h, 4m, 5b, 5h, 5m
Manager, Environmental Health and Safety	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Manager, Extended Learning Opportunity	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Manager, Facilities Planning	4a, 4c, 4i, 4l, 4m, 5a, 5c, 5i, 5l, 5m
Manager, Financial Accounting	1, 2, 3
Manager, Fiscal Control	1, 2, 3
Manager, Fleet Maintenance	4d, 5d
Manager, Food Services Acquisition and Production	1, 2, 3
Manager, Human Resources	1, 2, 3
Manager, Information Technology	1, 2, 3
Manager, Instructional Facilities Planning	4a, 4c, 4i, 4l, 4m, 5a, 5c, 5i, 5l, 5m
Manager, Instructional Materials	1, 2, 3
Manager, Interagency Coordinated Services	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Manager, Landscape Services	4h, 4i, 5h, 5i
Manager, Legislative Affairs - Sacramento	1, 2, 3
Manager, Magnet and Innovation Programs	4a, 4b, 4i, 4m, 4n, 5a, 5b, 5i, 5m, 5n
Manager, Network Services and Telecommunications	1, 2, 3
Manager, Outreach Program	4a, 4b, 4i, 4m, 4n, 5a, 5b, 5i, 5m, 5n
Manager, Physical Plant Operations Program Management	4c, 4h, 4i, 5c, 5h, 5i
Manager, Position Control and Financial Reporting	1, 2, 3
Manager, Translation and Community Services	4b, 4c, 4h, 4m, 4n, 5b, 5c, 5h, 5m, 5n
Manager, Transportation Operations	4d, 5d
Manager, Workers' Compensation	1, 2, 3

Position Title	Reportable Economic Interests Category Numbers (See Exhibit 2)
Officer, Special Education Compliance	1, 2, 3
Operations Specialist	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Policy Analyst I	1, 2, 3
Principal on Special Assignment	1, 2, 3
Program Manager, Accountability and Research	4b, 4h, 4i, 4m, 5b, 5h, 5i, 5m
Program Manager, Adult Education	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, Billiteracy and English Learner Support	4g, 4h, 5g, 5h
Program Manager, Children and Youth in Transition	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, Counseling and Guidance	4b, 4i, 4k, 4m, 5b, 5i, 5k, 5m
Program Manager, Cross Content Literacy UTK-12	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, Early Link School Readiness Program	4h, 4i, 4m, 4n, 5h, 5i, 5m, 5n
Program Manager, Education Technology	4a, 4b, 4f, 4g, 4i, 4m, 5a, 5b, 5f, 5g, 5i, 5m
Program Manager, Family Engagement	4a, 4b, 4h, 4i, 4m, 5a, 5b, 5h, 5i, 5m
Program Manager, Gifted and Talented Education	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, Health and Wellness	4g, 4h, 5g, 5h
Program Manager, Instructional Media Services	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, Integrated Advanced Studies & School Innovation	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, JROTC	1, 2, 3
Program Manager, LGBTQ and Advocacy and Education	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, Literacy	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, Math	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, Mental Health Resource Center	4a, 4b, 4i, 4k, 4m, 4n, 5a, 5b, 5i, 5k, 5m, 5n
Program Manager, Office of Language Acquisition	4a, 4b, 4h, 4i, 4m, 5a, 5b, 5h, 5i, 5m
Program Manager, Online Learning	4a, 4b, 4f, 4g, 4h, 4m, 5a, 5b, 5g, 5h, 5m
Program Manager, Parent Outreach	4a, 4b, 4f, 4i, 4j, 4m, 5a, 5b, 5i, 5j, 5m
Program Manager, Placement & Appeal	4b, 4h, 4i, 4m, 5b, 5h, 5i, 5m
Program Manager, Pre K Family Literacy	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, Program Monitoring	4h, 4i, 4m, 4n, 5h, 5i, 5m, 5n
Program Manager, Restorative Practices	4a, 4b, 4f, 4i, 4j, 4m, 5a, 5b, 5i, 5j, 5m
Program Manager, SANDAPP	1, 2, 3
Program Manager, School in the Park	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, School to Career	4h, 4i, 4m, 5h, 5i, 5m
Program Manager, Science	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, Secondary Teaching and Learning	4h, 4i, 4m, 4n, 5h, 5i, 5m, 5n
Program Manager, Section 504/ADA	1, 2, 3
Program Manager, Social Studies	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, STEM Innovation	1, 2, 3
Program Manager, Teacher Preparation and Induction	4h, 4i, 4m, 4n, 5h, 5i, 5m, 5n
Program Manager, Teacher Residency Program	1, 2, 3
Program Manager, Teaching and Learning	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Program Manager, UTK-12 Music	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Project Manager, DWA	1, 2, 3
Real Estate Specialist	1, 2, 3

Position Title	Reportable Economic Interests Category Numbers (See Exhibit 2)
Senior Buyer	1, 2, 3
Senior Contract Specialist	1, 2, 3
Senior Director, Instructional Support	1, 2, 3
Senior Director, Operations Support	1, 2, 3
Senior Executive Director of Staff	1, 2, 3
Senior Executive Director, Facilities Planning and Construction	1, 2, 3
Senior Executive Director, Human Resources	1, 2, 3
Senior Executive Director, Instruction	1, 2, 3
Senior Executive Director, Operations	1, 2, 3
Senior Zone Manager	4c, 4h, 4i, 5c, 5h, 5i
Software Systems Coordinator	1, 2, 3
Special Schools Building Services Supervisor	4c, 4h, 4i, 5c, 5h, 5i
Specialist, Community Relations	4a, 4b, 4i, 4m, 5a, 5b, 5i, 5m
Specialist, Instrumental Music	4h, 4i, 4m, 5h, 5i, 5m
Superintendent of Public Education	1, 2, 3
Systems Development Coordinator	1, 2, 3
Title IX Officer	4b, 4h, 4i, 4m, 5b, 5h, 5i, 5m
Transportation Services Supervisor (Personnel, Training, Safety)	1, 2, 3


CONSULTANTS

Employed as an Independent Contractor	2 ¹ , 4m ² , 5m ²
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COMMITTEES

Independent Citizens Oversight Committee (ICOC) members	1, 2, 3
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Any committee, of the Board of Education or the Superintendent, acting in a capacity such that an individual of the committee is performing the function of an individual who would fill a designated position.

Approved in a public meeting of the Board of
Education of the San Diego Unified School District
on 9/10/2024

Marty Stultz, Director, Board Services
San Diego Unified School District Board of Education

¹ Disclosure under economic interest category 2 shall be required of the Consultant when, in the opinion of the Board of Education, the Consultant may reasonably be expected to make, participate in making, or in any way attempt to use his or her position as a Consultant to influence a District decision directly or indirectly pertaining to real property.

² Each Consultant, who in the opinion of the Board of Education, may be expected to make, participate in making, or in any way use his or her position as a Consultant to influence a District decision in which the person might reasonably be expected to have a financial interest shall disclose investments in and income from a business entity, a business activity which is that of selling or leasing materials, equipment, supplies or services in any way related to the area in which the individual is rendering service.