

RESOLUTION NUMBER R- 290851

ADOPTED ON OCT 19 1998

RESOLUTION ADOPTING THE REVISED
CONFLICT OF INTEREST CODE FOR THE
FINANCIAL AND TECHNICAL SERVICES
BUSINESS CENTER.

WHEREAS, by Resolution R-287943 adopted on October 21, 1996, the City Council approved the Financial and Technical Services Business Center's Conflict of Interest Code, which was revised and updated following the required City-wide biennial review of all conflict of interest codes for which the City Council serves as code reviewing body; and

WHEREAS, Government Code section 87306.5 requires biennial review of local agency conflict of interest codes every even-numbered year; and

WHEREAS, Government Code section 87306 requires agencies to amend their conflict of interest codes whenever an amendment 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 Financial and Technical Services Business Center has proposed changes to Appendix A and Appendix B of that office's conflict of interest code to accurately reflect designated positions and appropriate disclosure categories; NOW, THEREFORE,

BE IT RESOLVED that the Financial and Technical Services Business Center's proposed changes to Appendix A and Appendix B of that office's conflict of interest code are hereby approved and are incorporated into its conflict of interest code.

BE IT FURTHER RESOLVED that revised Appendix A and Appendix B to the Financial and Technical Services Business Center's Conflict of Interest Code be placed on file in the Office of the City Clerk as Document No. RR- **290851**

BE IT FURTHER RESOLVED that the revised Conflict of Interest Code for the Financial and Technical Services Business Center become effective upon the date of adoption of this resolution.

APPROVED: CASEY GWINN, City Attorney

By *Lisa A Foster*
Lisa A. Foster
Deputy City Attorney

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Appendix A
FINANCIAL AND TECHNICAL SERVICES BUSINESS CENTER
DESIGNATED POSITIONS, DUTIES AND CATEGORIES
JULY, 1998
(see Appendix B for Category details)

Position	Duties	Category
FINANCIAL & TECHNICAL SERVICES		
Deputy City Manager	Manages the Financial and Technical Services Business Center, and assists the City Manager in the preparation and administration of the City's budget and financial programs.	2
Financial Management Director	Directs Financial Management Department and administers the Annual Budget, Capital Improvements Program, Purchasing, Print Shop and Treasurer.	2
Deputy Director	Manages and administers programs of the Budget or Financing Services Divisions. Has overall responsibility for purchases of supplies and services for the Division.	2
Program/Project Manager	Directs work programs, coordinates projects, and provides assistance and staff to management, committees and task forces.	3
Supervisors	Supervises professional staff; confers with department officials in the solution of administrative fiscal or organizational problems; forecasts and monitors expenditures and revenues; determines the economic effects of the City's fiscal and development decisions; conducts long range financial planning; and oversees bond issuances.	3
PURCHASING		
Purchasing Agent	Plans, directs and administers the City's Purchasing Program; and directs solicitation of bids and issuance of contracts for supplies, materials, equipment, non-professional services, and minor construction.	3

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Position	Duties	Category
Principal Procurement Specialist	Plans, assigns, and supervises work of buyers in solicitation of bids for purchase of materials, supplies, equipment, and non-professional services; and plans and performs purchases of assigned commodities.	3
Senior Procurement Specialist	Plans and performs high value or complex purchases of equipment, materials, supplies and non-professional services.	3
Procurement Specialist	Purchases an assigned group of commodities including equipment, materials and non-professional services.	3
Buyer's Aide	Purchases an assigned group of relatively low value and less complex commodities including equipment, materials, supplies and non-professional services.	3
PRINT SHOP/CENTRAL STORES/MAIL ROOM		
Deputy Director	Plans, directs, and coordinates the activities and operations of the City's Print Shop, Central Stores and mail room; administers the budget; estimates and monitors revenues; administers contractual printing, services; conducts auctions and sale of surplus City property; interacts with vendors, City Departments, and the Mayor and City Council offices to review requests for service and ensure customer satisfaction; works closely with Financial Management staff to establish a fair and competitive rate structure.	2

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Printing Services Supervisor	Acts for Deputy Director in his/her absence; schedules and coordinates a wide variety of printing services; analyzes printing job requisitions; assesses the feasibility of in-house production and recommends the use of outside vendors when appropriate; estimates costs of printing jobs; inspects work for quality control purposes; maintains records related to operations.	3
Offset Press Supervisor	Decides whether City printing jobs are printed in-house or sent to outside vendors; places orders with pre-approved firms for materials, supplies, and services on contract; and selects appropriate outside printers or service bureaus based on price and ability to meet job requirements, including deadlines.	3
Graphic Design Supervisor	Plans, coordinates and directs graphic design activities and performs related design work; coordinates with City departments to determine the level and type of graphic services required; coordinates with Print Shop to schedule and prioritize printing services; coordinates with vendors for contracted services; evaluates new graphic systems and equipment; establishes production priorities.	3
Storekeeper III	Oversees day-to-day operations of Central Stores; plans, organizes, and directs receipt, inspection, storage and issuance of City stock items; arranges for disposal of City surplus by auction, bid sales or discard; processes City surplus for disposition; monitors adherence to policies and procedures.	3

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Storekeeper II	Plans, organizes and directs receipt, inspection, storage and issuance of City stock items; arranges for disposal of City surplus by auction, bid sales or discard; processes City surplus for disposition; monitors adherence to policies and procedures; and may receive, inspect and issue stock.	3
Storekeeper I	Manages day-to day activities of assigned storeroom; receives and inspects goods for proper quality and quantity; places orders with preapproved suppliers for stock items.	3
Inventory Control Supervisor	Supervises City-wide Inventory Control System and maintains system integrity, including accuracy of value and quantities on hand of all materials; supervises Central Stores' accounts payable section, including liaison with Auditors and San Diego Data Processing Corporation; arranges for disposal of City surplus by bid sales.	3
TREASURER		
City Treasurer	Receive, disburse, have custody of, invest and account for all City monies; administer tax ordinances; assist in management of retirement and other trust funds; collect amounts owed by the City.	1
Investment Officer	Invest City's pooled investments; analyze City's daily cash position and forecast cash flow requirements. Administer City's banking contracts.	1
Assistant Investment Officer	Assist investment officer in investing City's funds and related duties.	2
Accounting Program Manager	Direct accounting units; develop and maintain cash control and related procedures.	3

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Position	Duties	Category
Collections Program Manager	Administer the collection of delinquent accounts; supervise Small Claims Court actions.	3
Business Tax Program Manager	Directs business tax program; including business and rental unit tax collection.	3
INFORMATION TECHNOLOGY AND COMMUNICATIONS		
Information Technology and Communications Director	Directs Information Technology and Communications Department and manages City-wide data systems programs.	2
Deputy Director	Manages and administers the Division, responsible for the maintenance, repair and improvements of City communication systems, street lighting systems, traffic signal systems. Has overall responsibility for purchases of supplies and services for the Division.	2
Project Manager/Coordinator	Directs work programs, coordinates projects, and provides assistance and staff to management, committees and task forces.	3
Supervisor	Supervises professional staff; coordinates City-wide data processing needs with City staff and the data processing corporation.	3
Senior Communications Engineer	Recommends and approves specifications for major purchases of communications equipment for all City departments. Administers Capital Improvements Program.	3
Associate Communications Engineer	Recommends and approves specifications for major purchases of communications equipment for all City departments. Assists in the administration of the Capital Improvements Program.	3

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Position	Duties	Category
Senior Communications Technician Supervisor	Performs supervisory duties of City forces and support services; reviews materials, supplies and items necessary in day-to-day operations in the communications field.	3
Information Systems Analyst III	Coordinate shared City data systems and standardization of programs; analyze and recommend hardware and software standards and other data systems needs as assigned.	3
Senior/Management Analyst	Analyzes technology needs; recommends and approves specifications for major purchases of computer hardware and software programs.	3
ORGANIZATION EFFECTIVENESS PROGRAM		
Organization Effectiveness Specialist	Plans, conducts and administers organizational development studies and training programs; coordinates the development of strategies and solutions to personnel and management problems Citywide; and assists in implementing new programs/procedures.	3
EMERGENCY MEDICAL SERVICES (EMS) PROGRAM		
Program Manager	Plans, directs and administers the City's EMS Program; and monitors contract compliance of EMS service provider and Fire & Life Safety Services First Responders. Has overall responsibility for purchase of supplies and services for the program.	3
CONSULTANTS		
Consultants	Refer to the Disclosure Category section (Exhibit B) for Consultants.	4

Appendix B
FINANCIAL AND TECHNICAL SERVICES BUSINESS CENTER
DISCLOSURE CATEGORIES
JULY, 1998

(See Appendix A for Cross-References)

Category 1 As required by Government Code Section 87200, designated positions in this category must file Disclosure Form 700.

Category 2 Investments and business positions in any business entity located in or doing business with the City.

Income and gifts from sources located in or doing business with the City.

Interests in real property located in the City, including property located within a two-mile radius of any property owned or used by the City.

Category 3 Investments and business positions in a firm or business entity that supplies goods or services to the City, receives goods or services from the City, that is a tenant of the City, that is an adverse party to the City in a legal proceeding, or that is granted authority by the City to use City facilities.

Income and gifts from any person or business entity that supplies goods or services to the City, receives goods or services from the City, that is a tenant of the City, that is an adverse party to the City in a legal proceeding, or that is granted authority by the City to use City facilities.

Interests in real property owned or used by any person or business entity that supplies goods or services to the City, receives goods or services from the City, that is a tenant of the City, that is an adverse party to the City in a legal proceeding, or that is granted authority by the City to use City facilities.

Category 4 Consultants:

Consultants shall be included in the list of designated employees for the Financial and Technical Business Center and shall disclose pursuant to the broadest category in the code subject to the following limitation:

The Deputy City Manager, Department Directors, Deputy Directors, City Treasurer, Purchasing Agent, Program or Project Managers, or Supervisors 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 determination is a public record and shall be retained for public inspection in the same manner and location as this Conflict of Interest Code.

CERTIFICATION

The foregoing amendment to the Conflict of Interest Code was prepared by the City of San Diego FINANCIAL AND TECHNICAL SERVICES BUSINESS CENTER after a fair opportunity was offered to the members of the FINANCIAL AND TECHNICAL SERVICES BUSINESS CENTER to present their views.

7/31/98
(date)

Patricia T. Hayes
(signature of executive officer)

NOTE TO LIAISONS: The certification is attached to the amended code, following the appendices.