Samples of Explanation of Changes

Sample 1

Office of Chief Policy Officer

1. The <u>Chief Policy Officer</u> is assigned to the broadest disclosure category, Category 1. The Chief Policy Officer reports to the Executive Director and is responsible for advising the Board and staff about policy and standards, setting policy standards for contracting, and overseeing regulatory compliance. The Chief Policy Officer will frequently make or participate in making decisions that may have a material effect on all of the entities in all of the required disclosure categories.

Operations

- 1. The <u>Chief Operations Officer</u> is assigned to the broadest disclosure category, Category 1. This position reports to the Executive Director and is responsible for the effective formulation, implementation, and evaluation of the policies and procedures pertaining to the administrative and operational processes of the Exchange. The Chief Operations Officer will frequently make or participate in making decisions that may have a material financial effect on all of the entities in all of the required disclosure categories.
- 2. The <u>Assistant Chief Operations Officer</u> is assigned to the broadest disclosure category with the exception of real property disclosure, Category 2. This position reports to the Chief Operations Officer. The Assistant Chief Operations Officer is responsible for assisting the Chief Operations Officer in the effective formulation, implementation, and evaluation of the policies and procedures pertaining to the administrative and operational processes of the Exchange. The Assistant Chief Operations Officer will frequently make or participate in making decisions that may have a material financial effect on most of the entities in the required disclosure categories. The Assistant Chief Operations Officer does not make decisions that will affect real property.

Sample 2

A	Business Services	Administration				
	1. Staff Services Director	2				
	2. Staff Services Manager	3				
	3. Business Services Assistant Manager Administrative Services Manager3					
	Business Services became Administration.					
 The Business Services Assistant Manager was reclassified Administrative Services Manager. 						

Sample 3

Key

A = Abolished (position no longer exists)

D = Deleted (position has been removed from the code – justification included)

M = Moved (position included in a different department)

N = New (position created since last code amendment)

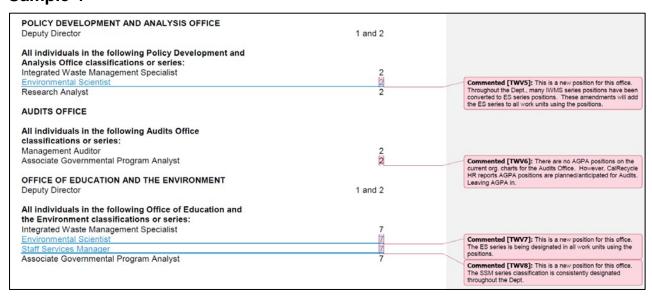
NC = No Change

R = Renamed

CC = Category Changed (position assigned to a different category – justification included)

Designated Position	Assigned Disclosure Categories	Proposed Change	Justification
EXECUTIVE OFFICE			
Director	1	NC	
Chief Deputy Director	1	NC	
Deputy Director	1	NC	
Assistant Director of Legislative Affairs	2, 5	R	Formerly Dep. Director for Legislation
Deputy Director for Legislation	2, 5	R	Now Asst. Dir. of Legislative Affairs
Special Assistant	3	Α	
Special Representative	4	М	Moved to External Affairs Dept.
Staff Manager	3, 4	NC	
Program Manager	3, 4	D	See attached justification
<u>Chief Counsel</u>	1	R	Formerly Senior Counsel
Senior Counsel	1	R	Now Chief Counsel
Senior Management Auditor	1, 2, 3	CC	See attached justification
Supervision Management Auditor	2, 3	N	See attached Duty Statement

Sample 4



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Conflict of Interest Code for (Agency's Name) Amendment Matrix

Sample 5

A - Current Code		B- Proposed Code			
Grouping & Positions	Disclosure	Action	Details	Explanation	
XYZ BRANCH	N/A	Rename Branch	PROGRAMS POLICY AND PLANNING DIVISION	Branch renamed due to reorganization in MONTH YEAR; Divisions include: A, B, and C.	
		ADD Division	CENTER FOR SOMETHING NEW	New division was created due to reorganization in MONTH YEAR.	
		ADD Position	SECTION MANAGER – Categories 1 and 2	New high level decision maker position whose duties are broad and indefinable; equivalent to Division Chief.	
		ADD Position	ASSISTANT MANAGER (All levels) – Category 3	New position that participates in making governmental decisions on departmental policy and budget.	
Principal Engineer	Category 1	CHANGE Categories	New categories – 1 and 2	Duties expanded to include decisions on facilities construction and site selection.	
OFFICE OF ADMINISTRATION		Rename Division	ADMINISTRATION DIVISION	Division was renamed due to reorganization in MONTH YEAR.	
Legal Consultant Category 1		Rename Position & Change Category	Legal Specialist (All levels) – Category 3	Disclosure assignment changed to reflect that the position is filled by a paralegal, rather than by an attorney.	
Collections Consultant Categ		Rename Position	Investigator (All) – Category 3	Positions at all levels participate in making governmental decisions on debt collection and negotiation.	
Supervisor		ADD Position	Manager (All levels) – Category 1	High level decision maker equivalent to Assistant Division Chief. Positions at all levels participate in making governmental decisions on contracts, expenditures, and vendor selection.	
Supervisory Assistant		ADD Position	Specialist (All) – Category 3	New position. All levels participate in making governmental decisions on hiring and supplies vendors for section.	
Associate Governmental Program Analyst			N/A	Position does not participate in making a governmental decision.	
Associate Information Systems Analyst	Category 4	DELETE Position	N/A	Position and category have both been eliminated.	

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