



**A Public Document**

State and local government agencies may use this form to identify new positions that will make or participate in making governmental decisions on behalf of the agency. An individual in a newly created position must file a Statement of Economic Interests (Form 700) within 30 days of assuming office.

This form identifies the Statement of Economic Interests, Form 700, disclosure requirements for individuals serving in new positions. This form is for the agency's internal use and should be maintained by the agency in the same manner as the agency's conflict of interest code. For more information, refer to the FPPC website [www.fppc.ca.gov](http://www.fppc.ca.gov) and Regulations 18700.3 and 18734.

**Disclosure Requirements**

- Disclosure requirements should conform to the range of duties.
- Alternatively, the agency must require an individual to file under the broadest disclosure category in the agency's conflict of interest code or, if the agency does not have a conflict of interest code, full disclosure.

Full disclosure includes reporting all investments, business positions, and interests in real property held on the date of assuming office and income received during the 12 months immediately preceding assuming office.

When a new position is added, in addition to completing this form, the agency should begin the process to amend the conflict of interest code.

*Examples:*

*An agency added a new data processing manager position. The individual will be assigned the same disclosure category that the agency's other IT staff are assigned.*

*An agency implemented a new licensing program and a new manager position was added. Because this was a new program, the agency provided a written description of the individual's disclosure requirements which included sources subject to the licensing procedures.*

*An agency reorganized and changed the duties of several positions listed in the conflict of interest code. This form is not required as positions are not new. The agency should begin to amend its conflict of interest code if the range of authority and types of decisions changed.*

*An agency changed the titles but not the duties and responsibilities of several positions. This form is not required. The agency must file an amendment to update the conflict of interest code.*

**Instructions**

**Part 1**

Identify the agency, contact information, and provide the amendment explanation in the comment section when applicable.

**Part 2**

Identify the new position(s) and describe the position's duties. Identify the disclosure by:

- Assigning an existing category(s) in the agency's code, or
- Writing a disclosure requirement.

Complete if the agency knows the employment date.

**Part 3**

The agency's conflict of interest code should identify the position that is responsible for the verification.

**Example**

| Agency Report of:<br>New Positions   |                        | A Public Document    |  | California Form 804                                 |
|--|------------------------|----------------------|--|---|
| 1. Agency Name (Also include, Division, Department, or Region (if applicable))   |                        |                      | <input type="checkbox"/> Amendment   |   |
| CA Joint Powers Authority  |                        |                      | Date of Original Filing: _____ (month, day, year)                          |   |
| Agency Contact   |                        |                      |  |   |
| Smith, Adam Executive Director   |                        |                      |  |   |
| Phone Number   | Email                  |                      |  |   |
| 555-555-5555   | adam.smith@cjpa.ca.gov |                      |  |   |
| 2. New Position Information  |                        |                      |  |   |
| Position Title/Classification and Job Summary  | Assigned Category      | OR                   | Disclosure Requirement   | Assuming/Start Date (Optional)                      |
| Data Processing Manager (manages IT Dept)  | 3                      |                      |  | Start <u>3</u> / <u>3</u> / <u>xx</u><br>m / d / yr |
| Licensing Director (duty statement attached)   | 3                      |                      | All investments, business positions in business entities, and sources      | Start <u>3</u> / <u>8</u> / <u>xx</u><br>m / d / yr |
| Licensing Director (duty statement attached)   | 3                      |                      | of income, including gifts, loans, and travel payments, from entities      | Start ___ / ___ / ___<br>m / d / yr                 |
| Licensing Director (duty statement attached)   | 3                      |                      | that are of the type subject to licensing by the Department or are subject | Start ___ / ___ / ___<br>m / d / yr                 |
| Licensing Director (duty statement attached)   | 3                      |                      | to regulation by the Department.   | Start ___ / ___ / ___<br>m / d / yr                 |
| Licensing Director (duty statement attached)   | 3                      |                      | (Alternately, attach a written explanation.)                               | Start ___ / ___ / ___<br>m / d / yr                 |
|  |                        |                      |  | Start ___ / ___ / ___<br>m / d / yr                 |
| 3. Verification  |                        |                      |  |   |
| <small>I have read and understand FPPC Regulations 18700.3 and 18734. I have verified that the disclosure assignment(s) set forth above, is in accordance with its provisions.</small> |                        |                      |  |   |
| <u>Adam Smith</u>  | Adam Smith             | Executive Director   | 3-10-XX  |   |
| <small>Signature</small>   | <small>Name</small>    | <small>Title</small> | <small>(month, day, year)</small>  |   |
| <small>Comment: (Use this space or an attachment for any additional information.)</small>  |                        |                      |  |   |