

APPENDIX

CONFLICT OF INTEREST CODE OF THE COUNTY OF SANTA CLARA

EXHIBIT "A"
LIST OF DESIGNATED POSITIONS FOR

OFFICE OF THE ASSESSOR

Designated Position	Disclosure Category
Administration Division	
Assessor	1
Assistant Assessor	1
Deputy Assessor	1
Division Chief, Office of the Assessor	1
Financial and Administrative Services Manager	1
Assessment Standards/Services & Exemption (SSE)	
Assessment Clerk, SSE	4
Exemption Investigator	3
Exemption Manager	3
Mapping & I.D. Supervisor	3
Property & Title Identification Technician	4
Property Transfer Examiner	3
Property Transfer Supervisor	3
Senior Training and Staff Development Specialist	3
Supervising Appraisal Data Coordinator	3
Training and Staff Development Specialist	3
Information Systems	
Application Developer	3
Business Systems Analyst	3
Director, Information Systems - Assessor's Office	1
IT Manager	3

Designated Position	Disclosure Category
Principal IT Manager	1
Senior Application Developer	3
Systems Administrator	3
Technology Architect	3
Test Engineer	3
Real Property	
Appraiser	3
Assistant Chief Appraiser	1
Office Management Coordinator	3
Senior Appraiser	3
Supervising Appraiser	1
Personal Property	
Accountant Auditor Appraiser	3
Assistant Chief Auditor Appraiser	1
Auditor-Appraiser I	3
Auditor-Appraiser II	3
Auditor-Appraiser III	3
Supervising Auditor Appraiser	1
Applicable to Entire Department	
Appraisal Aide	4
Appraisal Data Coordinator	4
Associate Management Analyst	4
Consultant	2
Management Analyst	3
Senior Assessment Clerk	4
Senior Auditor Appraiser	3
Senior Management Analyst	3
Supervising Assessment Clerk	3

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EXHIBIT "B" DISCLOSURE CATEGORIES FOR OFFICE OF THE ASSESSOR

Pursuant to the County of Santa Clara's Conflict of Interest Code, Disclosure Categories 1 and 2 shall read as follows for all Code Agencies.

Disclosure Category 1: Persons in this category shall disclose:

(1) all investments in, business positions in, and income (including gifts, loans and travel payments) from:

(a) all sources that provide, plan to provide, or have provided in the last two years, facilities, goods, software, hardware, or related technology, equipment, vehicles, machinery or services, including training or consulting services, to the County;

(b) all sources that are subject to the regulatory, monitoring, investigatory, enforcement, valuation, certification, permit or licensing authority of, or have an application for a license, permit or certificate pending before, the County;

(c) all sources that receive, are planning to apply to receive, or have received in the last two years, grants or other monies from or through the County; and sources that receive referrals to provide assessments and/or treatments that are required or recommended by the County; and

(2) all interests in real property in the County of Santa Clara located entirely or partly within the County, or within two miles of County boundaries, or of any land owned or used by the County.

Disclosure Category 2: Each Consultant shall disclose: (1) all investments in, business positions in, and income (including gifts, loans and travel payments) from: (a) all sources that provide, plan to provide, or have provided in the last two years, facilities, goods, software, hardware, or related technology, equipment, vehicles, machinery or services, including training or consulting services, to the County; (b) all sources that are subject to the regulatory, monitoring, investigatory, enforcement, valuation, certification, permit or licensing authority of, or have an application for a license, permit or certificate pending before, the County; (c) all sources that receive, are planning to apply to receive, or have received in the last two years, grants or other monies from or through the County; and

sources that receive referrals to provide assessments and/or treatments that are required or recommended by the County; and (2) all interests in real property in the County of Santa Clara located entirely or partly within the County, or within two miles of County boundaries, or of any land owned or used by the County, subject to the following limitation: the Code Agency for which a consultant works may determine in writing, following approval by County Counsel as to form and legality, that the particular consultant is hired to perform a range of duties that is limited in scope and, thus, is not required to comply with the full disclosure requirements described above, but instead must comply with more tailored disclosure requirements specific to that consultant. Such a determination shall include a description of the consultant's duties and, based upon that description, a statement of the extent of disclosure requirements.

In addition to the above two categories, the Office of the Assessor shall have the following categories:

Disclosure Category 3: Persons in this category shall disclose:

(1) all investments in, business positions in, and income (including gifts, loans and travel payments) from:

(a) all sources that provide, plan to provide, or have provided in the last two years, facilities, goods, software, hardware, or related technology, equipment, vehicles, machinery or services, including training or consulting services, to the Office of the Assessor;

(b) all sources that are subject to the regulatory, assessment, valuation, or appraisal authority of, or any other proceeding involving, the Office of the Assessor;

(c) all sources that receive, are planning to apply to receive, or have received in the last two years, grants or other monies (i) from or through the Office of the Assessor, or (ii) from or through the County related to the work of the Office of the Assessor; and

(2) all interests in real property in the County of Santa Clara located entirely or partly within the County, or within two miles of County boundaries, or of any land owned or used by the County.

Disclosure Category 4: Persons in this category shall disclose:

(1) income (including gifts, loans and travel payments) from all sources that are subject to the regulatory, assessment, valuation, or appraisal authority of, or any other proceeding involving, the Office of the Assessor; and

(2) all interests in real property in the County of Santa Clara located entirely or partly within the County, or within two miles of County boundaries, or of any land owned or used by the County.