San Diego Local Agency Formation Commission - Rules

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RULES
SAN DIEGO
LOCAL AGENCY FORMATION COMMISSION

ARTICLE I
ORGANIZATION

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1.1 CHAIRPERSON -

At the first regular meeting of each calendar year, the members of the Commission shall by vote select a chairperson and vice chairperson who shall be Commission members.

1.2 TERM -

The chairperson and vice chairperson shall each serve for a term of one year, unless otherwise specified by a vote of the Commission.

1.3 CHAIRPERSON, DUTIES -

The duties of the chairperson shall be to:

1. Preside at all meetings of the Commission;
2. Maintain order and decorum;
3. Determine the order of business, with the Commission's consent;
4. Execute payment of claims and expenses, as necessary;
5. Approve or modify, on behalf of the Commission, an impartial analysis of a ballot proposition prepared by the Executive Officer;
6. Represent the Commission to citizen groups and other public agencies.

1.4 VICE CHAIRPERSON, DUTIES -

In the absence of the chairperson, the vice chairperson shall have the duties of the chairperson.

1.5 CHAIRPERSON, VACANCY -

In the event the position of chairperson becomes vacant, the vice chairperson shall become chairperson for the unexpired term, and a new vice chairperson shall be selected by vote of the Commission.

1.6 VICE CHAIRPERSON, VACANCY -

In the event the position of vice chairperson becomes vacant, a new vice chairperson shall be selected by vote of the Commission.

1.7 CLERK (ADMINISTRATIVE ASSISTANT) -

There is hereby established the position of clerk (administrative assistant) to the Commission. The duties of the clerk shall be to:

1. Attend and take minutes of each Commission meeting;
2. Prepare and publish all required legal notices, documents and certificates.

1.8 EXECUTIVE OFFICER -

There is hereby established the position of Executive Officer. The duties of the Executive Officer shall be to:

1. Execute the policies and directives of the Commission;
2. Conduct and perform the day-to-day business of the Commission;
3. Execute payment of claims and expenses, consistent with Commission policy and directives;
4. Prepare and present the annual budget;
5. Prepare the agenda for each meeting of the Commission;
6. Act as custodian of all official books, records, documents, and correspondence of the Commission;
7. Represent the Commission, as directed;
8. Perform such other duties as may be assigned by the Commission.
9. Appoint Commission employees;
10. Administratively approve out-of-agency service agreements, if all conditions of approval have been met in accordance with Government Code Section 56133, and the applicant has satisfactorily demonstrated the existence of public health, safety, or welfare impacts. The Executive Officer is required to inform the Commission at the next available LAFCO meeting about any administratively approved service agreements;

11. Approve his/her own expense claims (e.g., general, travel, or non-travel) up to $500 for any single claim, consistent with Commission budget policy and direction. The Executive Officer is required to submit a summary of all self-approved claims and to the full Commission on a quarterly basis. Beginning in FY 2008-09 and every fiscal year thereafter, the Executive Officer is authorized to engage the services of an outside auditor to review applicable expenditure accounts of the Commission. The estimated cost and scope of the outside audit will be addressed in the Commission's annual budget; and
12. Approve step adjustments after above-standard employee performance evaluations, consistent with LAFCO budget policy and Commission direction (See also section 6.8).

1.9 SPECIAL DISTRICTS ADVISORY COMMITTEE -

The Commission recognizes the Special Districts Advisory Committee as a body to provide information on matters affecting independent special districts in San Diego County. Information about meeting location, agendas, schedules, selection of members, and other matters is contained in the Rules of the Special District Advisory Committee and Independent Special District Selection Committee.

1.10 CITIES ADVISORY COMMITTEE -

The Commission establishes the ad hoc Cities Advisory Committee to provide information and advice, related to matters affecting cities in San Diego County. The Committee functions in an ad hoc capacity and may be temporarily activated by the Executive Officer, Commission, or a majority of the Cities in the County. Information about meeting location, agendas, schedules, selection of members, and other administrative matters is contained in the Rules of the Cities Advisory Committee.

1.11 PERSONNEL COMMITTEE -

The Commission establishes the Personnel Committee to review matters relating to the Personnel Rules outlined in Section 6. The Committee shall be composed of three members of the Commission consisting of the Chair, Vice Chair, and Immediate Past Chair. The Chair shall make an appointment to fill the Immediate Past Chair seat on the Personnel Committee should the Immediate Past Chair no longer be on the Commission.

1.12 ADOPTION AND UPDATE OF LAFCO RULES -

The Rules shall be regularly reviewed and updated, as necessary. Adoption, amendment, or update of the Commission's Rules generally requires Commission approval. However, technical changes and updates, including but not limited to revising code section references or reflecting changes to applicable county ordinances or policies may be administratively incorporated into the Rules by the Executive Officer. The Commission shall be informed of all technical changes to the Rules.

Adoption History: Article I, Sections 1.1 to 1.12

Adopted June 30, 1975
Amended August 2, 1993
Amended December 6, 1993
Amended March 7, 1994
Amended April 4, 1994
Re-affirmed and adopted December 4, 2000
Comprehensively Updated and re-adopted March 3, 2008
Amended November 5, 2012 (Sec. 1.8)
Amended December 3, 2018 (Sec. 1.11)

RULES
SAN DIEGO
LOCAL AGENCY FORMATION COMMISSION

ARTICLE II
MEETINGS

2.1 Public Meetings
2.2 Regular Meetings
2.3 Adjourned Meetings
2.4 Special Meetings
2.5 Agendas of Regular Meetings
2.6 Quorum; Votes Needed to Carry a Motion; Effect of Failure to Approve a Matter
2.7 Matters Considered
2.8 Attendance at Meetings
2.9 Disqualification
2.10 Per Diems
2.11 Reimbursements
2.12 Electronic Tablet Use

2.1 PUBLIC MEETINGS -

All meetings and activities of the Commission shall be subject to the Ralph M. Brown Act.

2.2 REGULAR MEETINGS -

Regular meetings of the Commission shall be held on the first Monday of each month unless that Monday is a holiday, in which case that meeting will be held the following Monday. Meetings will commence at 8:00 a.m., in Room 302, County Administration Center, 1600 Pacific Highway, San Diego.

2.3 ADJOURNED MEETINGS -

Any meeting may be adjourned to a specific date, time, and place. The chairperson shall announce the date, time, and place of the adjourned regular meeting. A notice shall be posted at the Commission's regular place of posting specifying the date, time, and place of the adjourned regular meeting. Less than a quorum may adjourn a meeting. If all members are absent, the Commission Clerk may adjourn the meeting to a specified date, time, and place, and post the required notice.

2.4 SPECIAL MEETINGS -

A special meeting may be called at any time by the chairperson, or by a majority of the members of the Commission, by delivering personally or by any other means, notice to each member of the Commission and to each local newspaper of general circulation, radio, or television station requesting notice in writing. The notice must be received at least

24 hours before the time of the meeting as specified in the notice. The call and notice shall specify the date, time, and place of the special meeting and business to be transacted.
No other business shall be considered at such meetings by the Commission. The written notice may be dispensed with as to any member who at or prior to the time the meeting convenes, files with the clerk of the Commission a written waiver of notice. Such waiver may be given by telegram. The written notice may also be dispensed with as to any member who is actually present at the meeting at the time it convenes. The call and notice shall be posted at least 24 hours prior to the special meeting at the Commission's regular place of posting.

2.5 AGENDAS OF REGULAR MEETINGS -

At least 72 hours before a regular meeting, an agenda shall be posted at the Commission's regular place of posting that will contain a brief description of each item of business to be transacted or discussed at the meeting. The agenda shall also be posted on the Commission's website: sdlafco.org. However, failure to post on the Commission's website will not invalidate any action of the Commission. Any person may speak to any item on the agenda. In addition, the agenda will include an item entitled "Public Comment" during which members of public may speak to any matter within the Commission's jurisdiction, but not on the agenda. The Commission will not make a final determination on any issue raised during the Public Comment period that is not included on the agenda. The Commission will have the option of referring the matter to staff or scheduling action for a future agenda. Each speaker shall be limited to no more than three minutes on any item unless extended by permission of the Chairperson.

2.6 QUORUM; VOTES NEEDED TO CARRY A MOTION; EFFECT OF FAILURE TO APPROVE A MATTER -

1. Five members of the Commission constitute a quorum for the transaction of business.
2. An affirmative vote of the majority of the quorum present – and no less than four affirmative votes – is required to adopt any motion.
3. If a proposal for a change of organization or reorganization is wholly disapproved by the Commission, no further proceedings shall be taken on the proposal and no similar proposal involving the same or substantially the same territory, shall be initiated for one year after the date of adoption of the resolution terminating proceedings. The Commission may waive these requirements if it finds it to be in the public interest to do so.
4. If a proposal for a change of organization, reorganization or amendment of a sphere of influence is neither denied, continued nor approved at the meeting at which it is considered, it is deemed denied without prejudice to refiling a petition or resolution of application for the proposal at any time.
5. If a recommendation to adopt an original sphere of influence is neither approved nor continued at the meeting at which it is considered it is deemed automatically continued to the next meeting of the Commission.
6. If an application pursuant to Government Code Section 56895 to amend, modify or revise a resolution of the Commission is not approved or continued at the meeting at

which it is considered, it is deemed denied and no further action shall be taken thereon and no further application for the same or a substantially similar amendment, recodification or revision shall be accepted.

7. Any other recommendation before the Commission is deemed denied if it does not receive affirmative votes of the majority of the quorum present – with no less than four affirmative votes – or is not continued to another meeting.

2.7 MATTERS CONSIDERED -

No matter requiring a determination by the Commission pursuant to the Cortese/ Knox/Hertzberg Local Government Reorganization Act of 2000 shall be brought before the Commission unless it is first filed by the Executive Officer.

Adoption History: Article II, Sections 2.1 to 2.7
Adopted June 30, 1975
Amended February 2, 1987
Amended March 2, 1987
Re-affirmed and adopted December 4, 2000
Administratively Revised and Updated May 24, 2005
Comprehensively Updated and re-adopted March 3, 2008
Amended March 6, 2023 (Section 2:2)
Amended May 1, 2023 (Section 2:10)

2.8 ATTENDANCE AT MEETINGS -

1. Regular members of the Commission shall attend all meetings of the Commission. Alternate members are urged to attend all Commission meetings;
2. If a regular Commissioner cannot attend, s/he shall notify the Executive Officer one working day prior to the Commission meeting;
3. Each Commissioner is expected to remain for each entire meeting. Early departure is considered an absence for the purposes of these policies;
4. The Chairperson may excuse the absence of a Commissioner if s/he determines that the absence is due to sickness, personal emergency or attendance at another governmental function. All excused absences and the reasons for them shall be announced by the Chairperson at a regular meeting of the Commission; and
5. Inadequate attendance by a regular member of the Commission shall be considered non-performance of duties and shall result in the Chairperson notifying the appointing authority of the member's attendance record. Inadequate attendance shall consist of two unexcused absences, or three consecutive absences, for any reason, in any fiscal year.

2.9 DISQUALIFICATION -

By law, the Commission must hold hearings on certain actions, including certain changes of organization and reorganization proposals, adoption of spheres of influence, city protests under the Williamson Act, and other matters. Because of the Commission's concern for the fair and orderly conduct of its hearings, the Commission adopts the following rules, pursuant to Government Code Section 56300:

1. From time to time, any commission member may determine to disqualify him or herself from participating in consideration of a proposal. The member should make every effort to announce his or her disqualification for any reason at the beginning of the Commission's consideration of the item. In those instances where the commission member does not become aware of the reason for disqualification until after the item is before the Commission, the Commission member should disqualify him or herself as soon as s/he becomes aware of the reason for disqualification.

2. A Commission member who is absent from a hearing or a material portion of a hearing on a particular matter is disqualified from participation in the discussion and from voting on that matter unless the member:

   (a) Listens to the tape recording made of the hearing or the portion of the hearing from which the member was absent;
   (b) Examines the documentary material received by the Commission during the hearing or portion of the hearing from which the member was absent; and
   (c) States in public session for the record that s/he has done both of the above.

3. When a member of the Commission is disqualified or determines to disqualify him or herself, the designated alternate member shall serve and vote in his or her place (Government Code Sections 56325, 56325(a), 56331, 56331.3, 56332, 56332(d), 56335 and 56336).

Adoption History: Article II, Sections 2.8 to 2.9
Adopted June 5, 1978
Amended July 13, 1981
Amended January 10, 1983
Amended June 4, 1990
Re-affirmed and adopted December 4, 2000
Administratively Revised and Updated May 24, 2005
Comprehensively Updated and re-adopted March 3, 2008

2.10 PER DIEMS –

Pursuant to Government Code Section 56334, which permits LAFCOs to authorize payment of per diems to commissioners for attending meetings and in performing the duties of their office, the Commission has established a per diem rate of $305 effective July 1, 2025. Per diems shall be provided to Commissioners (regulars and alternates) for each day in attendance at regular and special meetings. Per diems shall also be provided for each day in attendance at standing or ad hoc committee meetings as well as official meetings, conferences, and trainings organized by the California Association of LAFCOs or the Southern Region of LAFCOs. No Commissioner shall receive more than five per diems per month. All requested per diems shall be listed on the LAFCO reimbursement form no later than 30 days after the event.

Adoption History: Article II, Section 2.10

Adopted March 4, 1991
Updated February 7, 2000
Re-affirmed and adopted December 4, 2000
Reaffirmed February 4, 2002
Administratively Revised and Updated May 24, 2005
Comprehensively Updated and re-adopted March 3, 2008
Amended May 7, 2018
Amended May 6, 2019
Updated August 5, 2019
Amended February 7, 2022
Amended May 5, 2023 (Section 2:10)

2.11 REIMBURSEMENTS –

Pursuant to Government Code Section 56380, the Commission shall make its own provisions for the usual and necessary operating expenses incurred by LAFCO. This includes – and as needed – providing reimbursements for Commissioners and staff.

1. The following general provisions apply to reimbursement of Commission expenses:

   (a) Commission members (regulars and alternates) may claim reimbursements for reasonable and necessary expenses incurred in performing the duties of their office.
   (b) The Executive Officer is responsible for reviewing and approving requests for Commission reimbursements.
2. The following general provisions apply to reimbursement of staff expenses:

   (a) Staff shall be reimbursed for all reasonable and necessary expenses in connection with conducting LAFCO business.
   (b) The Executive Officer is responsible for reviewing and approving requests for staff reimbursements other than for himself or herself.
   (c) The Chair or Vice Chair are responsible for reviewing and approving requests for Executive Officer reimbursements.
   (d) For purposes of this section, Commission Counsel shall be considered staff and subject to the reimbursement provisions.
3. The following procedures apply to reimbursements involving Commissioners and staff:
   (a) Expense reimbursement requests should be submitted as soon as possible, although flexibility is permitted for purposes of consolidating multiple expenses, but no later than 45 days after incurring the expense.
   (b) Expense claims for costs incurred in one fiscal year should be – whenever practical – submitted for reimbursement during the same fiscal year.
   (c) Expense claims shall be submitted using the standard LAFCO reimbursement form.
   (d) Applicable receipts shall be provided and attached to the reimbursement form. If receipts are not available, the requester shall succinctly summarize in writing the amount and purpose of the expense and attach to the reimbursement form.
   (e) The following provisions specific to transportation reimbursements apply:
      (i) Transportation requiring outside carrier services – including airlines, rails, shuttles, buses, vehicle rentals, and rideshares – shall be reimbursed equal to actual costs.
      (ii) Transportation requiring private vehicle usage shall be reimbursed using the current mileage rate of the Internal Revenue Service (IRS) plus actuals for tolls and parking. Staff reimbursement for private vehicle usage shall not apply to

normal workday travel to and from the LAFCO office. The Executive Officer shall only be eligible for private vehicle mileage reimbursement for travel outside San Diego County if he or she is receiving an automobile allowance.

(f) The following provisions specific to lodging reimbursements apply:

(i) Lodging reimbursements apply to overnight travel outside San Diego, Imperial, Orange, and Riverside Counties that requires attendance and/or travel before 7:00 a.m. for night-before accommodations and after 6:00 p.m. for night-of accommodations unless waived by the Executive Officer.

(ii) Pre-authorized lodging shall be reimbursed equal to actual costs so long as it does not exceed the maximum group rate published by the activity sponsor (i.e., conference organizer) and available at the time of booking. If a group rate is not available and/or applicable, reimbursement shall be booked at the governmental rate as far in advance as feasible.

(g)The following provisions specific to meals and incidental reimbursements apply:

(i) Meal expenses should be reasonable and moderate, taking into account community standards and the prevailing restaurant costs of the area.

(ii) Where the cost of a meal or meals is included as part of a registration charge or fee, there shall be no per diem meal reimbursement for the applicable meal period covered by such registration.

(iii) Commission and staff may request reimbursement for expenses paid in covering meals and incidentals of those in their company during an authorized function and/or duty that is a person in the service of LAFCO or a person donating service to LAFCO.

(iv) No reimbursements shall be made for alcoholic beverages of any kind.

(h) No prepayments shall be provided to Commission or staff for expected expenses incurred in performing work duties; all related costs shall be provided in the form of approved reimbursements unless otherwise provided under contract.

Adoption History: Article II, Section 2.11

Adopted March 4, 1991
Updated February 7, 2000
Re-affirmed and adopted December 4, 2000
Reaffirmed February 4, 2002
Administratively Revised and Updated May 24, 2005
Comprehensively Updated and re-adopted March 3, 2008
Amended May 7, 2018
Amended May 6, 2019
Administratively Revised and Updated August 5, 2019

2.12 ELECTRONIC TABLET USE -

Use of an electronic tablet (i.e.,iPads, etc.) will assist the Commission in the efficient performance of their duties and reduce material resources. Each Commissioner (regular and alternate) will be provided a tablet and supporting equipment for the principal purpose of reviewing agenda packets at all regular and special meetings. Commissioners shall not use the tablet in any way as to violate the public meeting requirements of the Brown Act. implementing rules follow.

1. Unless otherwise arranged, tablets will be provided to Commissioners on the dais and preloaded with the full agenda packet. The same tablet will be provided to each Commissioner and allow past packets and notes taken therein to be saved

and accessible for future reference. Commissioners shall leave the tablets on the dais for collection by staff at the conclusion of each meeting.

2. Commissioners have the elective to sign-out for a tablet. Under the elective, Commissioners shall be responsible for the security and care of the tablet and downloading all agenda packets and saving all related materials as needed. Upon return and following the preparation any appropriate backup files, the tablet will be wiped clean of any and all information.
3. All tablets will have WI-FI function. No data plans will be provided.
4. Commissioners may use the tablets for incidental personal uses so long as such uses do not conflict with policy or otherwise interfere with LAFCO business.
5. LAFCO will maintain appropriate warranty and service coverage on all tablets. Commissioners shall notify staff immediately should a tablet require service.
6. All other existing LAFCO policies apply to the Commissioners' use of the tablet and conduct on the internet and includes – but not limited to – Administrative Policy A-103 and provided as an appendix.
7. LAFCO reserves the right to inspect any and all files stored on the tablet to ensure compliance with this rule.
8. All Commissioners are encouraged to use tablets and specifically as a substitute for receiving paper agenda packets. Paper agenda packets, nonetheless, will be provided to any Commissioner at their request.

2.13 PARLIAMENTARY PROCEDURE -

Unless otherwise required by law, all meetings of the Commission shall be in accordance with [*Rosenberg's Rules of Order/ Robert's Rules of Order*]. However, technical failures to follow these procedural rules shall not invalidate any action taken.

Adoption History: Article II, Section 2.12
Adopted May 6, 2019

Adoption History: Article II, Section 2.13
Adopted March 2, 2026

RULES
SAN DIEGO
LOCAL AGENCY FORMATION COMMISSION

ARTICLE III
PROCEDURES

3.1 Withdrawal of Proposal
3.2 Denial Without Prejudice
3.3 Chairperson's Approval of Ballot Proposition Analysis
3.4 Reconsideration of Commission Determination

3.1 WITHDRAWAL OF PROPOSAL -

Any proposal which has been initiated by the filing of an application, a resolution or petition with the Commission may be withdrawn by filing a written request for withdrawal with the Executive Officer at any time prior to the issuance of a Certificate of Filing. If a Certificate of Filing has already been issued, then a proposal may be withdrawn, subject to Commission approval and/or Executive Officer authorization, prior to the conclusion of the Commission's consideration of the proposal. Such request shall be executed by the person or persons initiating the application or petition or by such other person or persons whose authority is established to the satisfaction of the Commission.

3.2 DENIAL WITHOUT PREJUDICE -

Whenever the Commission determines to disapprove a proposal, it may also waive the one-year time limit for submission of a similar proposal.

3.3 CHAIRPERSON'S APPROVAL OF BALLOT PROPOSITION ANALYSES -

Whenever the Executive Officer is required by law to prepare an impartial analysis of a ballot proposition, the chairperson of the Commission shall be authorized to act for the Commission in approving or modifying that analysis.

3.4 RECONSIDERATION OF COMMISSION DETERMINATION -

1. Requests for reconsideration of a Commission determination for which a resolution was adopted shall be filed, scheduled, and considered in accordance with Government Code Section 56895.

   The Commission shall consider the following factors when reviewing the request pursuant to Government Code Section 56895.

(a) Has significant new information been provided in the request that was previously unavailable at the time the Commission originally acted on the item?
(b) Have compelling arguments been presented in the request that would justify a reconsideration?
(c) Were substantive errors/omissions identified in the Commission's previous action that needs to be corrected through the reconsideration process?

2. Requests for reconsideration of a commission determination for which a resolution was not adopted shall be processed as follows:

(a) Any person or affected agency may file a written request with the Executive Officer requesting amendments to or reconsideration of any commission determination for which a resolution was not adopted.
(b) Any request shall be filed within thirty (30) days after the date on which the original commission determination was made.
(c) The request shall include:

(1) The reason(s) and justification for the request; and
(2) The specific amendment, modification, or other alteration to the Commission's original determination that is requested.

(d) Upon receipt of a timely request, any transmittal, notification, or other action that should have occurred as a result of the Commission's original determination shall be postponed during the time the Commission takes to act on the request.
(e) The Executive Officer shall include the request on the next agenda for which notice can be given in the same manner as was given for the item that is the subject of the reconsideration request. The Executive Officer also may give notice in any other manner that is deemed desirable.
(f) At that meeting, the Commission shall consider the request and receive any oral or written testimony. The consideration may be continued from time to time, but not to exceed thirty-five (35) days from the date specified in the notice. The person or agency that filed the request may withdraw it at any time prior to the conclusion of the consideration by the Commission.

The Commission shall consider the following factors when reviewing the request:

(1) Has significant new information been provided in the request that was previously unavailable at the time the Commission originally acted on the item?
(2) Have compelling arguments been presented in the request that would justify a reconsideration?
(3) Were substantive errors/omissions identified in the Commission's previous action that needs to be corrected through the reconsideration process?

(g) At the conclusion of its consideration, the Commission may approve or disapprove with or without amendment, wholly, partially, or conditionally, the request.

(h) The determinations of the Commission shall be final and conclusive. No person or agency shall make any further request for the same change, or a substantially similar change, as determined by the Commission.

Adoption History: Article III, Sections 3.1 to 3.4

Adopted June 5, 1978
Amended July 10, 1995
Re-affirmed and adopted December 4, 2000
Administratively Revised and Updated May 24, 2005
Comprehensively Updated and re-adopted March 3, 2008

RULES
SAN DIEGO
LOCAL AGENCY FORMATION COMMISSION

ARTICLE IV
PROVISION OF NEW OR DIFFERENT
SPECIAL DISTRICT SERVICES/FUNCTIONS
(LATENT POWERS)

4.1 Authorization
4.2 Definitions
4.3 Powers of the Commission
4.4 Classification of Functions and Services
4.5 Requirements of Special Districts
4.6 Commission Determination
4.7 Commission Disapproval of Report
4.8 Commission Determination of District Functions and/or Services
4.9 Restriction of District Functions and/or Services
4.10 Provision of Additional Functions and Services
4.10a Exception to Requirement for LAFCO Approval of the Provision of Additional Functions and/or Services
4.11 Application Materials for Latent Powers
4.12 Public Hearing Requirements
4.13 Commission Disapproval of Application
4.14 Commission Approval
4.15 Commission Procedures

4.1 AUTHORIZATION -

As provided in Government Code Section 56821, Chapter 761, Statutes 2000; amended by Chapter 667, Statutes 2001 and applicable predecessor statutes, the Commission adopts this Article as its rules and regulations governing the provision of new or different services/functions (latent powers) of special districts and reaffirms the representation upon the Commission of independent special districts.

4.2 DEFINITIONS -

The following definitions shall apply under this Article:

1. "Commission" means the San Diego County Local Agency Formation Commission.
2. "District" means an agency of the State as defined by Section 56036 of the Government Code for which the County of San Diego is its principal county as defined by Section 56066 of the Government Code.
3. "Executive Officer" means the executive officer appointed by the Commission or the County officer acting as the executive officer.

4. "Function" means any power granted by law to a local agency or a county to provide designated governmental or proprietary services or facilities for the use, benefit, or protection of persons or property (Government Code Section 56040).
5. "Legislative body" means the legislative body or the governing board of a district as defined in this Article.
6. "Proceedings" means proceedings taken pursuant to this Article.
7. "Proposal" means a request or statement of intention made by a resolution of application of a legislative body proposing proceedings for the provision of additional functions or services.
8. "Service" means a class established within a single local agency function including the public facilities necessary to perform the function. The San Diego LAFCO's adopted service classification system adopted per Government Code Section 56074 is applicable to all local agencies for purposes of defining functions and services.

4.3 POWERS OF THE COMMISSION -

The Commission may:

1. Require existing districts to file written reports with the Commission specifying the functions or classes of service provided by such districts (Government Code Section 56425 (h) (1)). Commission proceedings for the exercise of new or different functions or classes or services by special districts may be initiated by a special district by a resolution of application, including all of the matters specified for a petition in Government Code Section 56700, and submitted to the Executive Officer with a plan for services prepared pursuant to Section 56653 (Government Code Sections 56824.10, added by Chapter 667, Statutes 2001; and 56824.12).

2. Identify the nature, location, and extent of any functions or classes of service provided by existing districts (Government Code Section 56425 (h) (2)).

3. Determine that, except as otherwise authorized by such rules and regulations, no new or different function or class of service shall be provided by any existing district (Government Code Section 56824.14). The Commission shall review and approve or disapprove with or without amendments, wholly, partially, or conditionally, proposals for the establishment of new or different functions or class of services within the jurisdictional boundaries of a special district after a public hearing is called and held for that purpose. The expansion of latent powers shall not require a public hearing.

4. Modify (expand, increase, decrease, or eliminate) services or functions within the boundaries of an existing special district if requested by resolution of a special district that is subject to the proposed service or function modification.

These rules and regulations shall not apply to the extension or enlargement, within the boundaries of an existing special district, of any function or service that the Commission, pursuant to this Article has determined is currently being provided by such special district. However, if LAFCO has restricted the geographic area of any special district function or

service as a condition of latent powers activation, then LAFCO retains authorization over any extension, expansion, or enlargement, of such function or service within the boundaries of an existing special district.

4.4 CLASSIFICATION OF FUNCTIONS AND SERVICES -

The following classifications of functions and services are hereby established:

FUNCTION	SERVICES
Water	Wholesale, Retail, Replenishment, Injection
Sewer	Collection, Transportation, Treatment, Reclamation, Disposal
Public Transportation	Land, Sea, Air
Street Lighting	
Power	Generation, Distribution
Gas	Distribution
Cable Television	
Telephone/Communications	
Police	
Fire	Watershed, Structural
Ambulance	
Rescue/Disaster	
Parks and Recreation	Regional Park Development/Maintenance Local Park Development/Maintenance Recreation
Flood Control	
Cemeteries	
Hospitals	
Solid Waste	
Pest Control	
Vector Control	
Libraries	
Weed Abatement	
Planning	
Soil Conservation	
Roads, Streets and Highways	Improvement/Maintenance

Section 4.14 added: 9/16/74

4.5

REQUIREMENTS OF SPECIAL DISTRICTS -

Upon the adoption of this Article, each special district shall, at the request of the Executive Officer, provide, to the satisfaction of the Commission, the following materials within 30 days of such request:

1. A report of which functions and services are currently being provided by that district;
2. A statement as to the legal provisions regarding the rendering of such functions and services;
3. A map, showing the boundaries of the district and the location(s) where functions and services are provided.

For purposes of these rules and regulations a district shall be deemed to be providing a function or service if bonds have been heretofore authorized therefore, if substantial sums have been expended, if substantial financial obligations have been incurred therefore, if property, facilities or equipment have been acquired or constructed for such purpose, or if the district is actually exercising its powers to provide such function or service for the benefit of lands or inhabitants within the district.

4.6 COMMISSION DETERMINATION -

Following the receipt of such materials from a district as provided for in Section 4.5, the Commission shall determine:

1. To approve with or without amendment, wholly or partially or to disapprove the report on the functions and services currently being provided by the district and the location(s) where such functions or services are being provided;
2. To refer the report back to the district having submitted it and request modification of such report; the Commission shall set a reasonable date for the re-submittal of such modified report.

4.7 COMMISSION DISAPPROVAL OF REPORT -

In the event the Commission disapproves a report on the functions and services, the Commission may make its own study and report on the functions and services being provided by a district; the Commission shall, at the request of the affected district, consider its report at a public hearing prior to making a final determination on same.

4.8 COMMISSION DETERMINATION OF DISTRICT FUNCTIONS AND/OR SERVICES -

By approving the report of a special district as provided in Section 4.5 or by making its own report on the functions and services of a district as provided in Section 4.7, the

Commission shall thereby identify the nature, location and extent of the functions or services provided by such a district.

4.9 RESTRICTION OF DISTRICT FUNCTIONS AND/OR SERVICES -

At such time as the Commission has identified the nature, location and extent of the functions and services of any district, such district shall not provide any new or different function or class of service except as authorized by this Article, provided that this rule shall not apply to the extension or enlargement, within the boundaries of an existing special district, of any function or service which the Commission, pursuant to this Article, has determined is currently being provided by such special district. In approving a new or different function of class or service, the San Diego LAFCO may restrict the provision of the new or different function or class of service to a geographically specific area within the district. If the Commission imposes this restriction, any subsequent extension or enlargement of the service area will be subject to LAFCO review.

4.10 PROVISION OF ADDITIONAL FUNCTIONS AND SERVICES -

Any district making a proposal to provide functions and/or service in addition to those identified by the Commission pursuant to this Article shall file with the Executive Officer a resolution of its governing board making application for the provision of additional functions and/or services.

4.10a EXCEPTION TO REQUIREMENT FOR LAFCO APPROVAL OF THE PROVISION OF ADDITIONAL FUNCTIONS AND/OR SERVICES -

A district which is authorized by state law to provide for generation and distribution of electric power is not required to make application to nor obtain authorization from the Commission before providing that function, although the district has not provided that function previously (9/14/81).

4.11 APPLICATION MATERIALS FOR THE PROVISION OF NEW OR DIFFERENT SERVICES/FUNCTIONS (LATENT POWERS) -

A resolution of application shall be in such form as the Commission may prescribe and shall be accompanied by:

1. A statement of the nature of the proposal and the reasons therefore;
2. A legal description of the territory which is the subject of the proposal;
3. A map showing the boundaries of the subject territory;
4. Such additional date and information as may be required by the Executive Officer, pertaining to any of the matters or factors which may be considered by the Commission;
5. The name of the officers or persons, not to exceed three, who are to be given mailed notice of hearing.

4.12 PUBLIC HEARING REQUIREMENTS FOR LATENT POWERS ACTIVATION -

Upon the filing of a resolution of application, the Executive Officer shall set the matter for hearing by the Commission.

1. The date of the hearing shall not be more than 90 days after such filing.
2. The Executive Officer shall cause notice of hearing to be published in a newspaper of general circulation within the area for which the provision of additional functions and/or services are proposed, as specified in Government Code Section 6061 and 56824.14.
3. The Executive Officer shall also cause notice of such hearing to be mailed at least twenty-one (21) days prior to the date of hearing to:
   (a) the district adopting the resolution of application;
   (b) each city or district within three miles of the subject district;
   (c) each person who is designated in the application to receive notice or any person who has filed a written request for special notice with the Executive Officer.
4. Such hearing may be continued from time to time for a period not to exceed 70 days from the original date of such hearing. The conduct of such hearing shall be governed by the provisions of Section 56666 of the Government Code and by the Rules of the Commission. At any time not later than 35 days after the conclusion of the hearing, the Commission shall adopt a resolution making determinations approving or disapproving the provision of the additional functions and/or services by the District.

4.13 COMMISSION DISAPPROVAL OF APPLICATION -

If the Commission wholly disapproves any proposal involving the provision of such additional functions and/or services by the subject district, no proceeding shall be taken for the provision of such additional functions and/or services by the subject district for a period of one year after the date of such disapproval unless said period is waived by the Commission.

4.14 COMMISSION APPROVAL -

If the Commission approves the provision of additional function(s) and/or service(s), the Executive Officer shall, within 30 days of such approval, forward to the subject district a copy of the Commission's resolution.

4.15 COMMISSION PROCEDURES -

The procedures provided by this Article shall be generally guided by the provisions of Chapter 5 (commencing with Section 56821, Chapter 761, Statutes of 2000; amended by Chapter 667, Statutes 2001) of the Government Code.

Adoption History: Article IV, Sections 4.1 to 4.15
Adopted June 30, 1975
Re-affirmed and adopted December 4, 2000

Administratively Revised and Updated May 17, 2005
Administratively Revised and Updated August 7, 2006
Comprehensively Updated and re-adopted March 3, 2008

RULES
SAN DIEGO
LOCAL AGENCY FORMATION COMMISSION

ARTICLE V
FILING AND PROCESSING FEES

5.1 Authorization
5.2 Schedule of Filing Fees
5.3 Payment and Administration
5.4 Return of Fees
5.5 Disposition of Collected Fees

5.1 AUTHORIZATION -

As provided in Government Code Sections 56383, the Commission has adopted and may amend a schedule of fees covering the following:

1. Filing and processing applications filed with the Commission pursuant to Section 56383 and for applications filed by districts for extension of powers;
2. The estimated expenses of the proceedings to be taken by the Commission and any reorganization committee;
3. Checking the sufficiency of any petition filed with the Executive Officer;
4. The estimated expenses of amending or revising an adopted sphere of influence;
5. Processing contractual service agreements, municipal service reviews, reconsideration of Commission determinations, time extensions, environmental review, State Controller Review of incorporation fiscal analysis, pre-application consultation and special study reviews, plus the Commission's actual costs associated with performing other activities and services;
6. Rules and regulations governing the administration of such fees, as provided in Government Code Section 56383.

5.2 SCHEDULE OF FILING FEES -

LAFCO's adopted processing fee schedule shall be used as a basis for charging and collecting funds for Commission services. The fee schedule shall be available on the Commission website.

5.3 PAYMENT AND ADMINISTRATION -

The following provisions shall rule and regulate the payment and administration of fees:

1. Payment of applicable filing and processing fees shall be made to the Executive Officer or authorized designate when an application or petition is submitted to the Commission. Processing of the application or petition shall not begin until such filing fees have been paid.

2. The proponent or chief petitioners, as the case may be, shall be responsible for the payment of any applicable fees.
3. The Executive Officer shall cause all fees collected pursuant to this Article to be deposited with the Treasurer of the County of San Diego, or the treasury of the Commission. The Executive Officer shall maintain and establish a strict accounting of all fees collected pursuant to this Article.

5.4 RETURN OF FEES -

No fees collected pursuant to this Article shall be returned except as provided herein. The Commission or the Executive Officer may order the return or partial credit of any fees if it determines:

1. That any application, resolution, or petition has been withdrawn pursuant to Section 3.1 of these Rules; or
2. That payment of any such fees has been made or received as a result of an error in fact or in law by the Commission, the Executive Officer, the proponent, or the chief petitioner.

Should the Commission or Executive Officer order the return or credit of any fees pursuant to this Section, the Executive Officer shall cause the amount of such fees to be returned to the proponent or chief petitioners within forty-five (45) days of the determination to issue a return or credit of the fees.

5.5 DISPOSITION OF COLLECTED FEES -

Any fees collected and not returned pursuant to this Article shall be paid to the San Diego Local Agency Formation Commission.

Adoption History: Article V, Sections 5.1 to 5.5
Adopted April 7, 1986
Re-affirmed and adopted December 4, 2000
Administratively Revised and Updated May 24, 2005
Comprehensively Updated and re-adopted March 3, 2008



RULE NO. 6
Personnel Policies & Procedures

San Diego County
Local Agency Formation Commission
Administration Office
2550 Fifth Avenue Suite 725
San Diego, California 92103
www.sdlafco.org | 619-321-3321

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CHAPTER ONE
GENERAL PROVISIONS

1.1 Introduction

Welcome to San Diego County Local Agency Formation Commission (LAFCO or the "Commission"). We hope you will enjoy partnering with us and will find your work interesting, challenging, and fulfilling.

LAFCOs were established in 1963 and are political subdivisions of the State of California responsible for providing regional growth management services in all 58 counties. LAFCOs are comprised of locally elected and appointed officials with regulatory and planning powers delegated by the Legislature to collectively ensure smart and sustainable growth in California relative to the unique needs and conditions characterizing each county. Pertinently, LAFCOs coordinate and oversee the establishment, expansion, and organization of cities, towns, and special districts as well as their municipal service areas. This means actively balancing competing public policy interests and headlined by accommodating new growth and development while protecting agricultural and open space resources from their premature conversion. Further, when accommodating new growth, LAFCOs are tasked with prioritizing housing for persons and families of all incomes given the essentiality to the social, fiscal, and economic well-being of the state.

A common thread underlying San Diego LAFCO activities over its first 60 years has been the proven principle that local government is dynamic and evolves to the changing needs of the County of San Diego ("County") and its nearly 3.3 million residents. More changes to local government are assuredly needed to help ensure the County continues to grow for its own economic and social well-being. Equally assured is the next 60 years will not necessarily resemble the last 60 years and each employee is vital in helping to ensure the Commission remains adaptive and responsive in its service to the public.

1.2 Shared Team Values

In June, 2023, San Diego LAFCO staff participated in a facilitated team workshop to assess shared values in step with continuing to improve organizational performance. At the conclusion of the workshop, staff agreed to the following five shared values to serve as baseline expectations in holding each other accountable at work.

SHARED TEAM *Values*

As public stewards and employees of San Diego LAFCO we commit to and uphold the following values:



1.3 Expectations

1.3.1 Policy Intentions

The personnel policies and procedures outlined in this handbook are not intended to be a legal contract or agreement with employees. Instead, this handbook serves to describe the way the organization works and what mutual expectations you and the Commission should have from each other. There will be circumstances that will require changes to the policies, practices, and benefits. Technical changes or updates to the Rules may be approved by the Executive Office subject to provision 1.12 of the Rules. Amendments to these policies and procedures may be made and updates may be distributed to you from time to time. Where an applicable employee agreement specifically conflicts with a policy, the employee agreement provision will prevail. Unless otherwise provided in the employment contract between the Commission and the Executive Officer, the foregoing policy shall apply to all employees who have been:

1. Appointed and serve at the pleasure of the Commission; or
2. Appointed by the Executive Officer.

1.3.2 Employee Responsibilities

Each employee at San Diego LAFCO is responsible for reading and complying with these policies and procedures. Violations of these policies and procedures will be addressed with employees in performance discussions and may result in disciplinary action up to and including termination of employment.

In the event there is a discrepancy between the language in these policies and procedures relative to state or federal law, federal or state law will prevail.

1.4 Severability

If any part of these policies and procedures is determined to be unconstitutional or illegal, that part will be severed, and the remaining provisions will be applicable.

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CHAPTER TWO
WORKING CONDITIONS

2.1 Equal Employment & Related Protections

San Diego LAFCO affords equal employment opportunity for all qualified employees and applicants to all terms of employment with the Commission including, but not limited to, compensation, hiring, training, promotion, discipline, and termination of employment.

The Commission protects all employees, interns, applicants, and any others doing business with LAFCO from harassment, discrimination, and retaliation. This includes prohibiting any forms of discrimination, harassment, and retaliation from occurring within the Commission working experience; to define those terms; and to establish procedures for investigating and resolving internal complaints.

Any employee, job applicant, intern, volunteer, officer, official, or contractor who believes they have experienced any form of harassment or discrimination are encouraged to report this immediately to the Assistant Executive Officer or the Executive Officer using the complaint procedure provided in Appendix A, Prevention of Harassment and Discrimination. Alternatively, complaints may be made by contacting the United States Equal Employment Opportunity Commission or the State of California Civil Rights Department (CRD) www.calcivilrights.ca.gov

2.1.1 Reasonable Accommodation

San Diego LAFCO is committed to providing reasonable accommodations to affirmatively address employees and applicants' disabilities or other types of hardships whether temporary or permanent that otherwise effect their work activities. Where it is not an undue hardship or a direct threat to the health and safety of others, the Commission provides employment-related reasonable accommodations to:

- Employees and applicants who request reasonable accommodations to enable them to perform essential job functions based on temporary or permanent health conditions and as verified by an authorized medical provider;

- Employees with conditions related to pregnancy, childbirth, or a related medical condition, if she so requests, and with the advice of her health care provider;

- Employee victims of domestic violence, sexual assault, or stalking - to promote the safety of the employee victim while at work; and

- Employees who request reasonable accommodation to address a conflict between religious belief or observance and any employment requirement.

The Commission may require the individual to provide reasonable medical documentation confirming the existence of the disability and the need for reasonable accommodation, along with the name and credentials of the individual's health care provider. If the individual provides insufficient documentation, the Commission will: (1) explain the insufficiency; (2) allow the individual to supplement the documentation; and (3) pursue the interactive process only to the extent that the request for reasonable accommodation is supported by the medical documentation provided.

If the employee's – other than the Executive Officer – condition causes them to be unable to perform the essential functions of their position even with a reasonable accommodation, the Commission may separate the employee from employment. Similarly, should the Executive Officer's condition cause the same limitations, as described above, the Commission may separate the employee from employment.

If a pregnant employee, or an employee with a pregnancy-related condition – including an adoption, requests a reasonable accommodation, the Executive Officer or designee will provide the employee with notice of the need for a medical certification within two business days after the employee's request for accommodation. A medical certification confirming the need for a reasonable accommodation is sufficient if it contains:

- A description of the requested accommodation;

- A statement describing the medical advisability of the accommodation due to pregnancy; and

- The date that the need for the accommodation will become necessary and the estimated duration of the accommodation.

2.1.2 Certification of Victim Status

Any San Diego LAFCO employee who is a victim of domestic violence, sexual assault, or stalking and who requests an accommodation to provide for their safety while at work must provide both of the following:

- A written statement signed by the employee or an individual acting on the employee's behalf, to certify that the accommodation is to address victim-safety concerns while at work; and

- A certification demonstrating the employee's status as a victim of domestic violence, sexual assault, or stalking, which can be in the form of: a police report indicating the employee's victim status; a court order separating the perpetrator from the employee or that the employee has appeared in court for that purpose; or documentation from a medical professional or counselor that the employee is undergoing treatment for physical or mental injuries or abuse resulting from an act of domestic violence, sexual assault, or stalking.

2.1.3 Fitness for Duty Examinations

With respect to current employees at San Diego LAFCO, and to help ensure appropriate protections for all parties, the Executive Officer may require an employee to submit to a fitness for duty examination. The purpose of the examination is to determine whether the employee has a disability and can perform the essential functions of their job when there is significant evidence of the following:

- Employee's ability to perform one or more essential functions of their job has declined; or

- Circumstances cause a reasonable person to question whether an employee is still capable of performing one or more of their essential job duties or is still capable of performing those duties in a manner that does not harm themselves or others.

Should an employee not comply with a request from the Executive Officer to report to the designated medical provider for a fitness duty examination they will be subject to discipline including possible termination of employment.

With respect to applicants, after the Commission extends a conditional offer of employment to an applicant, San Diego LAFCO may require the applicant to submit to a fitness for duty examination that is job-related, necessary for efficient operations of the agency, and required of all applicants for the job classification.

The Commission will notify an applicant or employee who is required to pass a medical and/or psychological examination of their right to obtain a second opinion at their expense and that they may submit such second opinions for consideration.

2.2 Outside Employment & Related Activities

Employees at San Diego LAFCO may not engage in any outside employment or perform off-duty work, paid or volunteer, if it conflicts with or impairs the employee's ability to perform their job duties and responsibilities through the end of their workday. Similarly, any outside employment or off-duty work that impacts any aspect of the Commission's operations in terms of otherwise reasonable requests for employees to

attend meetings, trainings, and conferences that are outside their normal workday schedules shall be avoided and is the responsibility of the employee to mitigate.

To avoid perceived or actual conflicts of interest that may arise from outside employment, all employees must obtain prior written approval from the Executive Officer or designee.

2.2.1 Off Duty Conduct

While San Diego LAFCO does not seek to interfere with an employee's off-duty conduct, certain types of conduct exhibited outside of work may interfere with the Commission's legitimate business interests. Employees are expected to conduct their personal affairs in a manner that does not adversely affect the Commission's integrity, reputation, or credibility. Off-duty conduct that adversely affects legitimate Commission business interests or an employee's ability to perform their work is not permitted.

2.3 Confidential Information

San Diego LAFCO is a public agency and most but not all of the information on fille is readily available to the public through proper request procedures. However, the Commission also possess information regarded as confidential. A prominent example involves personnel records, which should remain confidential except when disclosure is required by law. The following examples are intended to serve as a guide to the types of such information and material:

- Commissioners and coworkers' home addresses, private telephone numbers, and personal email addresses.
- Privileged communications with Commission Counsel's Office.
- Working documents – including emails, notes, and draft reports – generated in the ongoing administrative review of applicants' proposals and requests.
- Any information that, if disclosed, could adversely affect the Commission's business.

Upon separation of employment, or at any time upon the Commission's request, employees must deliver all copies of confidential information or other property belonging to San Diego LAFCO.

2.4 Electronic Communication

Electronic information and communications require safeguards and impose unique responsibilities on all users at San Diego LAFCO. This policy and related procedures provide guidelines for the acceptable use of all Electronic Communications Resources and the responsibility for use of data stored electronically. The provisions of this policy apply to all employees of the Commission, including, but not limited to, full-time, part-time, and temporary employees, as well as volunteers, interns, agents, and vendors.

This policy governs all Electronic Communications including, but not limited to, the following commonly used devices at LAFCO:

internet	e-mail	voicemail
smart phones	computers/laptops	tablets
video + audio equipment	wireless networks	email networks
data networks	agency social media sites	software programs

The Commission, as the provider of access to its electronic communications and data e-sources, reserves the right to specify how those resources will be used and administered to comply with this policy. Employees may be subject to corrective action including termination for using the Electronic Communications Resource Devices in a manner other than for their intended purposes, or in a manner that violates applicable laws. Employees should only perform work on LAFCO issued devices and must not use personal devices this applies to employees with telecommuting privileges.

2.4.1 No Expectation of Privacy

San Diego LAFCO's information and communication network is provided by the Commission to individual employees based on authorization by the Executive Officer. It remains at all times Commission property. All employee transactions on the internet from Commission devices (e.g., computers, telephones, smart phones, and tablets as well as e-mail and data networks) - including e-mail, contact lists, and task lists - are considered public information. Records of these transactions can be requested by anyone at any time, subject to certain Public Records Act exceptions and attorney-client privilege material. In that regard, the internet may be monitored for legitimate reasons at any time.

Employees using the internet from Commission devices have no reasonable expectation of privacy. Messages that are transmitted via the internet can be intercepted by anyone and the information contained in the message can be used for any purpose by anyone retrieving the message. Access to the web browser is being logged and these files can be subject to review at any time.

2.4.2 Active Monitoring

All communications transmitted via Commission Electronic Communications Resources Devices at San Diego LAFCO, whether related to personal or confidential matters, are subject to monitoring, at the Commission's discretion. The Commission monitors communications transmitted via the assigned Commission e-mail in the ordinary course of business for purposes that include ensuring their reliability and security. The existence of passwords and "message delete" functions do not restrict or eliminate the ability or right of the Commission to access electronic communications.

Employees should not communicate any personal, private, privileged, or confidential information including but not limited to personal attorney client communications, financial, medical information, or other privileged information, using the Commission's Electronic Communications Resources Devices. Employees who do communicate their private, privileged, or confidential information using the Commission's Electronic Communications Resources Devices will be considered to have waived any privilege or privacy rights in those communications, even where those communications are made via personal password-protected accounts using the Commission's Electronic Communications Resource Devices. Users can have no reasonable expectation of privacy in use of Commission systems, devices, or materials. The Commission may be required to produce information transmitted or stored on its Electronic Communications Resource Devices pursuant to a court order, subpoena, or statute.

2.4.3 Internet Restrictions

The information sources accessible through the internet are worldwide and constantly growing in kind and number. It is not possible to fully itemize the types of information accessible by systems and their users. Nonetheless, San Diego LAFCO reserves the right to restrict access to any online data source at its sole discretion. These restrictions do not constitute an implication of approval of other non-restricted sources.

Without exhausting all the possibilities, the following are examples of inappropriate use of the Commission's Electronic Communications Resource Devices:

- Exposing others unwillingly, either through carelessness or intention, to material which is offensive, obscene or in poor taste. This includes information which could create an intimidating, offensive, or hostile work environment.

- Using Electronic Communications Resource Devices in any way that may, for a reasonable person, create or further a hostile attitude or give offense based on race, color, religion, national origin, citizenship, ancestry, marital status, gender, disability, age, veteran's status, sexual orientation, or any protected status.

- Communicating confidential LAFCO information to unauthorized individuals within or outside the Commission.

- Sending messages or information that conflicts with applicable law or LAFCO policies, rules, or procedures.

- Attempting to access unauthorized data or break into any LAFCO or non-LAFCO system.

- Engaging in theft or the unauthorized copying of electronic files or data.

- Intentionally misrepresenting one's identity for improper or illegal acts.

- Engaging in unlawful activities.

- Transmitting and/or accessing obscene material and/or pornography.

- Online gambling.

- Engaging in commercial activity or activity for financial gain, not under the support of the Commission.

- Receiving and/or downloading executable files and programs using electronic mail or the Internet without express permission of the Executive Officer is prohibited. This includes, but is not limited to, software programs and software upgrades. All downloaded files must be scanned for viruses before installing on Commission owned equipment. Software applications/programs that must be upgraded on a routine basis are exempt from this restriction.

- Using another user's name and/or account, without express written permission of the Executive Officer, to access the Internet is strictly prohibited.

- Violating copyright and license agreements regarding software or publication they access or download from the internet. The Commission will not condone violations of copyright laws and licenses and the employee will be personally liable for any fines or sanctions caused by the license or copyright infringement. Any software or publication that is downloaded onto Commission computer resources, becomes the sole property of the Commission.

- Using Commission equipment or resources to speak on the Commission's behalf without authorization.

2.4.4 Incidental Personal Use

San Diego LAFCO employees may use Commission devices (e.g., computers, telephones, smart phones, and tablets as well as e-mail and data networks) for incidental personal communications if kept to a minimum and limited to break times or non-working hours and does not violate the terms of this policy. Incidental personal use of electronic resources must not adversely affect the performance of official duties or the organization's work performance, must not be disruptive of colleagues and peers, and must be of limited duration and frequency. More than occasional, incidental use of Commission devices, including during nonwork time, is not permitted.

2.4.5 Personal Social Media Code of Conduct

San Diego LAFCO understands that employees may engage with personal social media and social networking websites on their own time. While the Commission respects its employees' right to engage in these off-duty activities, employees are nonetheless held to a high professional standard as public servants and expected to conduct themselves appropriately in all such public communications, whether on or off the clock. Individuals violating this policy may be subject to discipline up to and including termination.

To ensure that Commission employees understand the Commission's expectations regarding external social media use, the following guidelines have been developed. Employees are expected to follow these guidelines using their best personal and professional judgment. Employees are expected to always conduct themselves professionally, and in a manner that does not adversely impact Commission interests.

- Employees are personally responsible for the content they publish on blogs, wikis, or any other online form of user-generated media and should be mindful that what is published will be public indefinitely.

- Employees should avoid discussing Commission or Commission-related matters using personal social media. If such matters must be discussed, the employee should write in the first person and make it clear that they are representing themselves, and not the Commission.

- Employees may not publish or disclose Commission or another's confidential or other proprietary information. Employees should not publish or report on conversations or any communication on information that is meant to be private or internal to the Commission.

- Employees may not use insensitive language or otherwise engage in any conduct that would be discourteous, offensive, or unprofessional in the workplace, or that would otherwise violate any Commission policy, including but not limited to the policy prohibiting harassment and discrimination.

- Employees are not to use Commission logos in any of forums for non-work-related purposes.

- Employees should be aware of their association with the Commission in online social networks and ensure that their profile and related content are consistent with how they wish to present themselves to colleagues and the public.

- Employees are encouraged to be the first to correct unprofessional behavior, not to provoke fights, and avoid altering previous posts without indicating that they have done so.

- Employees should refrain from using social media during paid work hours, even if they are not actively posting to social media.

This policy is in no way intended to prevent employees from engaging in protected concerted activity or engaging in otherwise lawful conduct on their own time. This policy is separate from the Commission's Administrative Policy (A-107) regarding the Social Media Use Program.

2.5 Telecommuting

San Diego LAFCO has implemented a telecommuting policy – adhered as Appendix C - and allows certain employees to telecommute from an alternative worksite on a situational or regular basis for some of their regularly scheduled work hours. Telecommuting is a privileged and cooperative arrangement between employees and the Commission and subject to certain eligibility conditions and requirements.

The Executive Officer or designee possesses the discretionary authority to determine the job classifications, positions, and employees who are eligible to telework under this policy. The Executive Officer or designee, may decide using criteria including, but not limited to, the following:

- Regular status full time employees who have worked at the Commission for at least 6 months, including the probationary period, with the discretion of the Executive Officer to reduce or expand the period;

- Prior annual job performance evaluation and/or job performance that meets or exceeds standards across all listed performance measures and demonstrates employee ability to work independently;

- The employee is self-motivated and demonstrates high dependability;
- Job duties and requirements allow the employee to be away from the Commission's worksite for a period during the work week;
- The availability or ability to create a functional, reliable, healthy, safe, and secure alternate worksite for the employee at a reasonable cost;
- The risk factors associated with performing the employee's job duties from a location other than the LAFCO office;
- Telecommuting does not impede other employees or work groups from performing their job duties, impact the Commission's business needs, or diminish the operations of the Commission;
- Telecommuting does not reduce service to internal or external customers; and
- The supervisor can manage the employee remotely – this includes the ability to have ready access to the employee throughout the workday.

2.5.1 Requesting Privileges

San Diego LAFCO employees may request telecommuting privileges by completing a LAFCO Telecommuting Application. The employee is responsible for filing the completed request form with their supervisor or manager. The employee's supervisor or manager will proceed to provide the request to the Executive Officer with a recommendation. The Executive Officer will consider the recommendation provided by the employee's supervisor or manager in acting on the request with respect to approving, approving with modifications, or denying.

The Executive Officer will consider Teleworking requests on a case-by-case basis consistent with the criteria above and other factors relevant to the employee's request to telecommute. The decision of the Executive Officer regarding an employee's telecommuting request is final and binding. The employee possesses no right to appeal the decision.

2.5.2 Participation Guidelines

The duties, obligations, responsibilities, and conditions of employment at San Diego LAFCO are not changed by telecommuting. Employee's wage, retirement, benefits, and insurance coverage remain unchanged.

The telecommuting employee remains obligated to comply with all Commission rules, policies, practices, and instructions. Violations may result in disqualification from telecommuting and/or disciplinary action, up to and including termination of employment. The Commission's Workers Compensation liability for job-related accidents will continue to apply during the employee's telecommuting work hours.

Work hours, overtime compensation, and vacation schedule will conform to Commission policies and practices, Fair Labor Standards Act (FLSA), and to any other terms agreed upon by the employee's supervisor, except that, those terms may not violate the laws/provisions stated above. Flexible hours of work can be arranged with the supervisor.

Employees will work at a designated location during hours agreed upon. Arrangements for flexible work schedules are subject to the Executive Officer's or supervisor's approval.

2.5.3 Employer Expectations

San Diego LAFCO expects employees to match productivity whether they are working at the office or telecommuting. Expectations must be pre-established within the agreement and between telecommuters and supervisor or manager regarding work assignment(s), productivity level, and productivity measurements to be used when employee is telecommuting. Timeliness, quality, and quantity of work must be maintained.

Attendance and punctuality that observes scheduled hours on a regular basis is essential and must be maintained during telecommuting, unless otherwise approved in advance. The employee is expected to be prepared to participate in videoconferencing at any time during their scheduled telecommuting work hours and is expected to abide by the appearance and dress code policy, have their video feed on at all times, and be in a professional approved off-site work setting without distractions.

The employee agrees not to engage in employment activities other than Commission assignments during telecommuting hours.

- Telecommuting Equipment

  Equipment provided by the Commission is not an entitlement for telecommuters. The Commission may provide equipment but is not obligated to do so. Office supplies needed by the telecommuter will be provided by the Commission. All requests must be pre-approved by the responsible supervisor or manager. The Commission retains ownership of all equipment and/or licenses provided.

Use of Commission equipment and supplies is limited to authorized persons for purposes relating to Commission business. The employee is responsible for ensuring that equipment is used properly. The Commission will provide for maintenance and repairs to Commission equipment.

Use of personal equipment is not permitted. Employees should only perform work on LAFCO issued equipment.

The Commission is not responsible for the payment of utilities (heat, electricity, etc.) or home maintenance costs. Telephone charges related to Commission business will be paid by the Commission.

In the event of delay in repair or replacement of equipment or any other circumstance under which it would be ineffective for the employee to telecommute, the employee will return to the Commission workplace.

- Telecommuting Location

  The employee must designate a workspace at home or another location that is maintained in a safe condition, free from hazards. The telecommuter will be responsible for completing a workspace safety review. Any accident must be brought to the immediate attention of the supervisor.

  As part of telecommuting responsibilities, the telecommuter must ensure that safety and ergonomic standards are met in their workspace. Although the workspace does not have to be a separate room, it must have adequate lighting, ventilation, and furniture that is ergonomically comfortable and safe to use.

  Telecommuters must have a method for appropriately receiving and responding to communications (phone calls, messages, mail, etc.) from other staff, supervisors, and when applicable, clients and/or the public. Communication method(s) will be included in the written agreement between the supervisor and the employee.

  During the employees' work schedule, the supervisor and/or manager may make an unannounced visit to the employees off-site designated work area.

  The teleworker is solely liable for injuries to third persons and/or members of employee's family on employee's premises. The Commission is not liable for damage to the employee's real property.

  Telecommuters must take all reasonable precautions necessary to secure Commission information and equipment in their workspace and prevent

unauthorized access to any Commission system or information. Data and information used by teleworkers must be treated with the same caution and respect that confidential material is given in the office. In some cases, teleworkers will need to take a few added precautions.

2.6 Use of LAFCO Vehicles

San Diego LAFCO employees with a valid California driver's license and insurance certificate on file with the County of San Diego and the Executive Officer are eligible to use LAFCO-owned vehicles for official agency business. Use is subject to approval by the employee's supervisor and/or manager and may include overnight privileges. LAFCO-owned vehicles shall not be used to transport unauthorized passengers, including family members except as may occur on an incidental basis or with a business justification. Incidental personal use of LAFCO-owned vehicles must not adversely affect the performance of official duties or the organization's work performance, must not be disruptive of colleagues and peers, and must be of limited duration and frequency. More than occasional, incidental use of a LAFCO-owned vehicle, including during non-work time, is not permitted. Employees with authorization to use the LAFCO-owned vehicles will be responsible for keeping the vehicle clean and presentable at all times. Accidents and/or damages must be immediately reported to the employee's supervisor and/or manager.

2.7 Use of Personal Vehicles

San Diego LAFCO employees who travel using their personal vehicles on work-related business must have a valid California driver's license and insurance certificate on file with the County of San Diego and the Executive Officer. An employee who is asked and who agrees or is required as a condition of employment as defined in their job description to use their personal vehicle while performing Commission business is eligible for mileage reimbursement at the current rate established by the Internal Revenue Service.

Only hands-free mobile devices may be used when driving in adherence with current law. Employees who drive on work-related business whether using their own or a San Diego LAFCO vehicle should use available safety belts in the vehicles being operated.

2.8 Interoffice Relationships

2.8.1 Employment of Relatives

On occasion, a qualified applicant for job opening at San Diego LAFCO may be a relative, or spouse or registered domestic partner of a present employee. Although given no preferential treatment, they will be considered when applying for job

openings. However, consideration will not be limited solely to a relative, but will include all other applicants. The Executive Officer reserves the right to refuse employment of an existing employee's relative where such employment would or could reasonably compromise the safety, security, supervision, or morale of Commission operations. Additionally, relatives will not directly report to and/or supervise another family member.

The following definitions apply to this policy.

- A "relative" is defined as a child, stepchild, parent, stepparent, grandparent, grandchild, brother, stepbrother, sister, stepsister, half-brother, half-sister, aunt, uncle, niece, nephew, or in-laws of those enumerated by marriage or domestic partnership. This also includes any person serving or who has served as parent or any other person living in the same household as the employee.

- A "spouse" means one of two persons to a marriage, or two people who are registered domestic partners, as those terms are defined by California law.

- "Supervisory relationship" means one in which one employee exercises the right or responsibility to control, direct, reward, or discipline another by virtue of the duties and responsibilities under the Commission's organizational chart.

2.8.2 Workplace Relationships

San Diego LAFCO defers to employees' best judgement with respect to entering workplace relationships. Should a workplace relationship develop, both employees should immediately disclose the relationship to their supervisor and/or manager. The subject employees will be required to re-review the Commission's anti-harassment policies and avoid any public displays of affection with each other. Notwithstanding the preceding provisions, the Commission prohibits workplace relationships between superiors and subordinates given the inherent power imbalance.

2.8.3 Married or Domestic Partners After Employment

If two San Diego LAFCO employees later become spouses or domestic partners, and no accommodations for both partners can be found, the Executive Officer has sole discretion to separate one of the employees from employment.

2.9 Alcohol & Controlled Substances

Employees are the most valuable resource at San Diego LAFCO. For this reason, the Commission has a critical interest in assuring the health, safety, and wellbeing of its employees and the maintenance of a safe and efficient work environment. This includes adopting standards and guidelines to promote a professional workplace

environment and eliminate drug and alcohol related inefficiencies and associate risks while adhering to state and federal laws applicable to public entities. The following polices and related standards apply to all Commission employees whether they are on LAFCO property, or they are performing Commission related business elsewhere.

Employees may not consume alcohol while on regular duty in any manner that impairs their professional judgement, irrespective of place.

- Employees cannot consume or manufacture, use, sell, purchase, possess, or distribution of any controlled substances, narcotic (including marijuana) or prescription drug that has not been lawfully prescribed while on regular duty, irrespective of place.

- An employee who is on notified call to return to work outside their regular duty is expected to adhere to all consumption standards and/or prohibitions outlined in this section.

- "Regular" duty means an employee's approved work schedule, which may include authorization to telework from home on certain days.

Employees must inform the Executive Officer of any criminal conviction for an alcohol or drug violation that occurred while on regular duty or on-call within five days after the conviction, and irrespective of filing any legal appeals.

Violation of this policy will result in corrective action, up to and including termination of employment, even for a first offense.

2.9.1 Medications

San Diego LAFCO employees must notify the Executive Officer or Assistant Executive Officer before beginning work when taking medications which could reasonably interfere with the safe and effective performance of duties. This includes the employee's ability to use and/or operate Commission equipment and devices as well as any vehicles – whether LAFCO-owned or personal.

Prescription and over-the-counter drugs are not prohibited when taken in standard dosage and/or according to a physician's prescription. Any employee taking a prescribed or over-the-counter medication is responsible for consulting the prescribing physician or pharmacist to determine whether the medication may interfere with safe performance of their job. An employee is not required to disclose the nature of their medical condition, or to identify the medication they are taking, but must clearly indicate effects, such as impaired alertness, balance impairment, warning about operation of machinery, etc. The Executive Officer or Assistant Executive Officer reserves discretion to determine whether to direct the employee to take sick leave.

Violation of this policy will result in corrective action, up to and including termination of employment, even for a first offense.

2.9.2 Reasonable Suspicion Drug and Alcohol Testing

If the Executive Officer or Assistant Executive Officer has reason to suspect that an employee with San Diego LAFCO may be under the influence and/or impaired due to drugs or alcohol while at work, or when reporting for work, that employee may be ordered to immediately submit to testing. The test will be conducted by a professional medical staff and laboratory. Likewise, when the Executive Officer or Assistant Executive Officer reasonably suspects that an employee's impairment from drugs or alcohol may have been a factor in an injury or accident during work or while operating Commission equipment or a vehicle, that employee may be also ordered to take a test.

Such examination and/or tests, when requested, will be on Commission time, are considered a condition of employment, and will be at the sole expense of the Commission. Transportation will be provided to and from the medical facility. If the employee tests positive, the employee may be subject to immediate discharge. Should an employee refuse to submit to the requested examination or test, the employee will be subject to corrective action, up to and including termination of employment.

2.10 Health & Safety

San Diego LAFCO is committed to providing employees with a work environment that is conducive to safe, effective, and productive job performance. The health and safety of our employees is a priority. All employees must follow safe working practices and instruct others to work safely. The following best practices should be followed.

- Employees uncertain of the safe way to perform a job, should ask for help. An employee should also inform the supervisor or manager of any perceived hazards.

- All accidents must be immediately reported to the employee's supervisor and/or manager. Any injury, no matter how minor that occurs during regular duty, irrespective of place, must be reported promptly to ensure that the appropriate documentation of the incident is completed. Employees may be entitled to Workers' Compensation benefits for on-the-job injuries, and prompt, accurate reporting of accidents will assist in obtaining the benefits.

In compliance with California law, and to promote the concept of a safe workplace, the Commission maintains an Injury and Illness Prevention Program (IIPP).

2.11 Workplace Violence

San Diego LAFCO is committed to providing a safe and secure workplace and will not tolerate acts or threats of violence in the workplace. The workplace includes any location where Commission business is conducted, including vehicles and parking lots. Employees are prohibited from participating in or promoting acts of intimidation, violence, threats, coercion, assault and/or abusive behavior toward any person while working for the Commission. The Commission has zero tolerance for any conduct that references workplace violence, even if it was intended to be harmless, humorous, a prank, blowing off steam, or venting. Violations of this policy may lead to criminal prosecution, or corrective action, up to and including termination of employment.

"Workplace violence" is defined as any conduct that causes an individual to reasonably fear for their personal safety or the safety of their co-workers, family, friends, and/or property. Specific examples of workplace violence include, but are not limited to, the following actions:

- Threats or acts of physical harm directed toward an individual or their family, friends, associates, or property;
- The destruction of, or threat of destruction of Commission property or another employee's property;
- Fighting, challenging another person to fight, or participating in dangerous or threatening horseplay;
- Striking, punching, slapping, or assaulting another person;
- Grabbing, pinching, or touching another person in an unwanted way whether sexually or otherwise;
- Harassing or threatening phone calls, tests, videos and/or emails;
- Surveillance;
- Stalking; and
- Possessing a weapon(s) during work hours unless the Commission issues the weapon(s) for performance of the job. "Weapon" is defined as a firearm, chemical agent, club or baton, knife, or any other device, tool, or implement that can cause bodily harm if used as a weapon or displayed in such a manner to cause harm or threaten a person with harm.

Equally, employees should not be subjected to violence or threats. It is the responsibility of all employees to notify the Executive Officer or Assistant Executive Officer immediately of any threats or acts of violence in the workplace. Notification may be made to any of these persons as appropriate and should be reported as soon as practicable. Retaliation against any person who reports such an incident will not be tolerated.

The Commission whether through the Executive Officer or Commission Counsel will see that reported violations of this policy are investigated as necessary.

2.12 Travel & Expense Reimbursements

San Diego LAFCO business travel will be carried out in an efficient, cost-effective manner resulting in the best value. The Commission will pay or reimburse all pre-approved business travel-related expenses based on reasonableness, meal guidelines and on the actual amount of expense incurred by the employee. Reimbursement for personal expenses and alcoholic beverages will not be authorized for payment and may not be charged to a Commission credit card. Additional guidelines follow.

- Commissioners and employees may be paid for travel time with prior authorization the Executive Officer or Assistant Executive Officer.

- Receipts must be submitted for all expenses, with the completed expense report, including bridge toll receipts and parking costs. If receipts are not available, a written explanation must be provided as to why this is the case and the reason the expense was incurred.

- Complete expense reports submitted to the Executive Officer or Assistant Executive Officer at least two days prior to the end of the pay period to be processed on the upcoming pay period.

2.12.1 Meals

While traveling, San Diego LAFCO employees and Commissioners are responsible for payment of all employee meals unless the Executive Officer and/or the Assistant Executive Officer are present and participating in the meal. Appropriate expenses may be submitted for reimbursement using the employee expense reimbursement form. Employees are expected to use good judgment when incurring expenses while traveling and purchasing meals and remain mindful of appearances.

Meals not incurred as part of out-of-area or overnight travel are limited to activities outside of normal duties, such as business-related meetings held before or after regular working hours (including working lunches) or extended time due to special projects or emergencies. Meal reimbursements are not allowed as part of routine daily

work assignments, unless part of the registration cost or the meal is served on site as part of the program to keep all participants together.

2.12.2 Public and Commercial Travel

San Diego LAFCO employees at times may be required to travel as a part of their assigned duties. Common examples include attending out-of-area trainings, conferences, and hearings. Employees should coordinate through the Executive Officer or designee for their air travel, car rental and lodging arrangements and submit expenses on an expense report. Whenever practicable, employees should prioritize public transit options.

Discounted government or sponsoring group rates for transportation and lodging should be used whenever offered and available. When conference or training sponsors have arranged for lodging, employees will stay at these facilities and the cost should not exceed the maximum published group rate. If rooms are not available at these facilities, accommodations should be at a comparable facility at a comparable cost.

2.13 Tuition Reimbursement

San Diego LAFCO encourages the advancement of its employee in subjects related to Commission functions, including job-related courses that lead to a degree or certification from an accredited institution. The Commission, following completion of a course, will reimburse the employee for the cost of tuition subject to the following conditions:

- The employee has the prior approval of the Executive Officer, and the course is directly related to the position and beneficial to the Commission.

- The applicant is a full-time employee in good standing, that is, not on probation or under disciplinary action, and has met all the course requirements. (The Executive Officer may waive this requirement for probationary employees on a case-by-case basis).

- Approved courses are successfully completed with a letter grade of "C" or better, or a pass/fail grade of "Pass".

- Reimbursement equals 10% of the tuition cost or $1,500, whichever is greater. Reimbursements are made at the end of each semester, quarter, or class ending.

Courses requiring attendance during work hours will not be charged to vacation time provided the Executive Officer has approved the absence from duty. A forty-hour workweek must be maintained.

This policy does not apply to an employee's voluntary attendance, outside of normal working hours, at formal or informal educational sessions, even if such sessions may generally lead to improved job performance. While the Commission generally encourages all employees to improve their job skills and promotional qualifications, these activities will not be subject to this policy regarding reimbursement or compensation unless prior written approval is obtained from the Executive Officer.

2.13.1 Advanced Payment

San Diego LAFCO employees may request advanced payment. Employees who receive advanced payment must submit transcript and receipts for covered expenses within 30 days of completion of the class. The Commission will automatically deduct the full amount advanced from the employee's payroll check if the employee fails to submit the required documents or terminates their employment. Employees may request advanced payment for approved courses which might not otherwise be financially feasible.

If an employee retires, resigns, or is terminated prior to the completion of the class and has received an advance, the advanced amount will be deducted from the employee's last paycheck. Hardships will be considered on a case-by-case basis.

2.14 Whistleblower Protection

San Diego LAFCO prohibits all the following:

- Taking any retaliatory adverse employment action against an employee because the employee has or is believed to have disclosed information to any government or law enforcement agency, including to the Commission, if the employee has reasonable cause to believe that the information discloses a violation of state or federal law, or a violation or noncompliance with a local, state, or federal rule or regulation;

- Preventing an employee from disclosing information to a government agency, including to the Commission if the employee has reasonable cause to believe that the information discloses a violation of state or federal law, or a violation or noncompliance with a local, state, or federal rule or regulation;

- Retaliating against an employee for refusing to participate in any activity that would result in a violation of state or federal law, or a violation or noncompliance with a local, state, or federal rule or regulation; and

- Retaliating against an employee because the employee's family member has or is perceived to have engaged in any of the protected activities listed above.

This policy governs and protects Commission officials, officers, employees, or applicants for employment.

An applicant or employee who feels they have been retaliated against in violation of this policy should immediately report the conduct according to the complaint procedure in the Commission's policy against discrimination, harassment, or retaliation so that the complaint can be resolved fairly and quickly. Supervisors and managers have the same responsibilities as defined in the policy against discrimination, harassment, or retaliation.

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CHAPTER THREE
EMPLOYMENT ADMINISTRATION

3.1 Categories of Employees

3.1.1 At-Will Employee

All employment at San Diego LAFCO is "at will" meaning both the employee and the Commission have the right to terminate the employment relationship at any time, without cause or advance notice. This also means that any Commission employee may be disciplined, have job responsibilities altered, or incur a decrease in pay without cause or advance notice. No experience with the Commission, including, but not limited to, oral statements, length of employment, performance reviews, promotions, salary increases, or disciplinary measures may be regarded as implicitly changing this at-will relationship.

3.1.2 New Hire Employee

The first six (6) months of continuous employment with San Diego LAFCO is considered a new hire introductory period during which the employee will learn their job responsibilities, get acquainted with co-workers, and learn more about the Commission. Completion of the introductory period does not entitle the employee to remain employed by the Commission for any definite period, but rather allows both the employee and the Commission to evaluate whether the employee is right for the position. During the introductory period, an employee's employment may be terminated at any time with or without cause or advance notice. The Executive Officer may extend the probation period for an employee for an additional six months at their discretion.

3.1.3 Promotional Employee

After being promoted to a higher job classification, an employee at San Diego LAFCO will be evaluated after completion of six months in the new position as to their suitability for the position.

3.1.4 Regular Full Time Employee

A regular full-time employee at San Diego LAFCO holds a position budgeted to work at least 40 hours per week. Regular full-time_employees receive all benefits provided in these policies.

3.1.5 Regular Part Time Employee

A regular employee who holds a position budgeted to work less than 30 hours per week. Part-time employees may have different rights to leave and other benefits under the law or these policies, depending on the number of hours they work.

3.1.6 Temporary, Intern, or Seasonal Employee

Employees at San Diego LAFCO hired on an "as needed" or casual work basis for a limited duration or for a specific project or projects and may be regularly scheduled to work up to 40 hours per week. Generally, these assignments do not last longer than three months, but may be extended to a maximum of six continuous months (or longer for casual or seasonal employees). Temporary or seasonal employees are not eligible for employment benefits other than those authorized by applicable law.

3.1.7 Temporary Appointment to a Higher Class

The Commission – on the recommendation of the Executive Officer – may grant an existing employee a ten percent increase in compensation while such employee is assigned to perform the duties of a position which at the time is compensated at least ten percent higher than such employee's class; the assignment must be for a period exceeding 10 continuous working days but shall not exceed 130 working days.

3.2 Classification Plan

San Diego LAFCO's classification plan, as per the position specifications included in Appendix A of this Policy, consists of classes of positions described and defined by class specifications (duties, responsibilities, qualifications) and class title. Fulltime and parttime regular positions may be established only upon recommendation of the Executive Officer and approved by the Commissioners. Fulltime and parttime temporary positions may be established only with the approval of the Executive Officer or designee. The following definitions apply:

- "Executive Officer" means the Executive Officer appointed by the Commission pursuant to Government Code Section 56038.

- "Professional Employee" means the Executive Officer, Assistant Executive Officer, Geographic Information Systems (GIS) Analyst, Communications Associate, Local Governmental Analysts I, II, and III for the purpose of these personnel rules only.

- "Support Employee" means Administrative Assistant, Administrative Aide, Commission Clerk, Executive Assistant, Records Clerk, for the purpose of these personnel rules only.

3.2.1 Reclassification

The Executive Officer may initiate a job audit to determine whether the duties of a position at San Diego LAFCO have changed to such an extent that they require reclassification of the position from the existing classification to a more appropriate classification. This applies regardless of any incumbent who holds the position(s). When the job audit is completed, the Executive Officer will make a recommendation regarding reclassification to the Commission Board.

3.3 Recruitments

The Commission or Executive Officer may utilize any legitimate recruitment procedure for attracting qualified applicants to fill budgeted positions at San Diego LAFCO. The Executive Officer or designee may fill a vacant budgeted position with an existing Commission employee, who is both qualified for the position and willing to accept the employment change, leave the position vacant, or fill the vacancy with a person who is not currently a Commission employee. The Executive Officer or designee may make appointments without going through a recruitment procedure, when in the best interest of the Commission.

3.3.1 Disqualification from Further Consideration

The Commission or Executive Officer may reject any application submitted as part of a recruitment at San Diego LAFCO which: is not properly completed or incomplete; received after an application deadline; or indicates that the applicant does not meet the minimum qualifications for the position. Whenever an application is rejected, the applicant will be notified.

False, or misleading information of material fact on application materials may result in rejection or dismissal of the applicant. Application materials and examinations are confidential records and will not be returned to applicants. No applicant information will be asked that is prohibited under any state or federal law.

3.3.2 Reference Checks

All job applicants with San Diego LAFCO will provide information on previous employment and other references as required. Final offers of employment will not be made until the Commission or Executive Officer has had an opportunity to verify the information to their satisfaction.

It is the policy of the Commission not to discuss the information obtained by way of the reference check with prospective employees and all related correspondence is kept in a separate confidential file.

3.3.3 Background Checks

A candidate being considered for hire at San Diego LAFCO will be subject to a background check that may include review of their credit record (if applicable to the position for which they are applying), personal history, education, professional credentials, military record, and criminal records. However, any background check will be conducted only after a conditional job offer has been made, in accordance with applicable law. No background check will be undertaken without first obtaining the candidate's written authorization. If the candidate refuses to give authorization, the candidate will be considered to have withdrawn their application for employment.

3.3.4 Employees Previously Employed by a County

The Commission shall accrue all sick leave, vacation, and retirement benefits of persons hired from counties pursuant to Section 56385 of the Government Code. For the purpose of calculating such benefits, the Commission may add previous county service to the tenure of service of employees, providing service has been continuous.

3.4 Compensation

3.4.1 Salary Ranges

Budgeted compensation at San Diego LAFCO is determined by the Commission consistent with current policies and procedures. The Commission sets salary ranges for all established positions sufficient to attract and retain quality employees. The Executive Officer administers and maintains the salary range and benefits (Compensation Plan) for all budgeted positions, and this includes setting employee's pay within the position range and established for a specific period of work.

The Commission establishes, administers, and maintains the compensation for the Executive Officer, an Executive Management position, pursuant to the Executive Officer Compensation Plan. The plan provides for initial placement and subsequent adjustment of salary within the salary schedule fixed by the Commission. Any adjustment in rate of compensation pursuant to the plan shall be administered by the Commission. The plan is provided as Appendix B.

3.4.2 Hiring Up to Mid Points

All new San Diego LAFCO employees are advised at the time of hire as to their starting base rate of pay and benefits. Unless otherwise merited, the staring base rate will not exceed the mid-point of the established salary range. The base rate of pay of an employee does not change during their introductory period.

3.4.3 Post New Hire Compensation

The Commission or Executive Officer will consider changes to an employee's base rate of pay after the completion of their introductory period with adjustments only occurring at the beginning of a pay period. Changes to pay will be consistent with an employee's performance as determined by supervisor and/or manager.

3.4.4 Employee Performance Incentive Program

With commission budgetary approval, the Executive Officer is authorized to implement the employee performance incentive program. The program is based on recognizing exemplary performance through providing bonuses and/or cash awards. The Executive Officer may provide a one-time annual exemplary performance bonus to qualified Commission staff, not to exceed 5% of the annual salary for employees deemed eligible by the Executive Officer. The annual cycle is based on the fiscal year. Commission employees may receive exemplary performance pay and/or recognition pay in one lump sum cash award or in incremental cash awards.

In addition to performance bonuses up to 5% of an employee's annual salary, the Executive Officer may also provide recognition pay to Commission staff not to exceed $1,000 per award. The criteria for the award will be based on cost-savings, service improvement, or other tangible benefits to LAFCO operations directly attributable to an individual member of the LAFCO staff. Multiple awards may be granted to Commission staff as long as the aggregate monetary total of the awards do not exceed $1,000 for each member of the staff during the fiscal year. The Executive Officer is also authorized to establish an office-wide performance recognition program and is authorized to allocate up to $1,250 annually to support this program.

Non-executive Commission employees with a minimum of 15 years of continuous LAFCO/County of San Diego employment are eligible for a 1-2% annual salary band increase, contingent on exemplary performance subject to a determination by the Executive Officer.

3.5 Performance Reviews

Performance reports for each employee at San Diego LAFCO will be prepared prior to the six-month anniversary of hiring, and at least once a year (approximate) thereafter. The performance review will follow a standard format established by the Executive Officer and serve as the basis to determine any compensation adjustments to which each employee of the Commission may be entitled. The performance review will also provide an opportunity for the Executive Officer with input from any supervisor to set formal objectives for the employee proceeding forward.

After the completion of the performance review, the Executive Officer will share their assessment with the employee and provide a written summation. Employees who do not concur with the Executive Officer's performance review may, within 15 days following the review of the performance rating, file a written response outlining specific objections. The employee's written response will be attached to the Executive Officer's performance review placed in the employee's personnel file at LAFCO.

3.6 Hours of Work

San Diego LAFCO's basic workweek consists of seven consecutive calendar days, beginning at 12:01 a.m. on Sunday and ends at 12:00 p.m. on Saturday. The standard workday begins at 8:00 a.m. and concludes at 5:00 p.m., Monday through Friday at the LAFCO office. All regular employees follow a set work schedule consistent with the standard workday. All part-time, seasonal, or temporary employee follow a set work schedule within the hourly parameters of the standard workday as set by the Executive Officer or Assistant Executive Officer.

Any work outside of the 8:00 a.m. to 5:00 p.m. workday must receive prior approval.

The Executive Officer may authorize an alternative work schedule for employees as a privilege to accommodate employee preferences and/or needs so long as most of their time falls withing the standard workday hours of 8:00 a.m. to 5:00 p.m. Employees' set work schedule may only be changed by the Executive Officer. The Executive Officer has the discretion to suspend or terminate the privilege and return an employee's schedule to the workday hours.

The Executive Officer has the authority to establish and maintain appropriate timekeeping procedures and related verification for all employees.

3.7 Employee Breaks

3.7.1 Meal Break

A 30-minute non-compensated meal break will be provided by San Diego LAFCO to all full-time overtime-eligible employees who work at least an eight-hour workday. The meal break will be taken within the first five hours of the employee's workhours. It is the responsibility of the employee to take their meal break.

3.7.2 Rest Break

A 15-minute compensated rest period will be provided by San Diego LAFCO to all eligible employees for each four-hour period of service. The rest period is to be taken at a time chosen by the employee. Rest periods may not be combined to shorten the workday or to extend the meal period.

3.8 Dependent Care Accommodations

3.8.1 Family Friendly Efforts

San Diego LAFCO appreciates the additional challenges experienced by employees with dependent care responsibilities away from work. Accordingly, the Commission encourages the Executive Officer to consider and implement additional accommodations for employees with dependent care obligations to assist their work-family balance so long as essential job duties are being met.

3.8.2 Lactation Accommodation

San Diego LAFCO employee who wishes to express breast milk for her infant child during her scheduled work hours will receive a reasonable amount of additional unpaid time beyond the 15-minute compensated rest period. Those who wish to take a lactation break must notify the Executive Officer or Assistant Executive Officer prior to taking such a break. Breaks may be reasonably delayed if they would seriously disrupt operations. Once a lactation break has been approved, the break should not be interrupted except for emergency or urgent circumstances.

The Commission will make reasonable efforts to accommodate employees by providing an appropriate location, which is not in a bathroom, to express milk in private. The Commission will attempt to find a location near the employee's work area. The appropriate location will also meet the following requirements:

- Be shielded from view and free from intrusion while being used to express milk;
- Be safe, clean, and free of hazardous material;
- Contain a surface on which to place a breast pump and personal items;
- Contain a place to sit; and
- Have access to electricity needed to operate an electric-powered breast pump.

The Commission will provide access to a sink with running water and a refrigerator, or other cooling device, suitable for storing milk near the employee's work area.

Employees occupying these private areas will either secure the door or otherwise make it clear to others through signage that the area is occupied and should not be disturbed. All other employees should avoid interrupting an employee during an authorized break under this section, except to announce an emergency or other urgent circumstance. Authorized lactation breaks for employees assigned to the field may be taken at the nearest appropriate private area.

Any employee storing expressed milk in any authorized refrigerated area within the Commission must clearly label it as such. No expressed milk can be stored at the Commission beyond the employee's workday/ shift.

The Commission encourages any employee who does not believe they are being provided with an appropriate lactation accommodation as required by state law to inform the designated RGS Liaison Officer. An employee who does not believe that the Commission is providing them with an appropriate lactation accommodation as required by state law has the right to file a complaint with the California Division of Labor Standard Enforcement/Labor Commissioner. Their nearest offices are in the government section of the telephone book.

3.9 Overtime

Overtime is all hours an overtime-eligible employee at San Diego LAFCO works over 40 hours in the designated 7-day workweek. Only actual hours worked will be counted towards the 40-hour threshold for purposes of calculating overtime pay under the Fair Labor Standards Act (FLSA); paid leave will not be counted.

Overtime-eligible employees at San Diego LAFCO are not permitted to work overtime except as directed and authorized by their supervisor or manager, or in case of emergency, as determined by the Commission. Working overtime without prior authorization or approval is grounds for discipline. In emergency situations that require working overtime, the employee must notify a supervisor and/or manager as soon as possible, and in no event later than the end of that day upon which the emergency occurred. If the supervisor or manager denies the request to work overtime, the employee must obey the directive and cease working. Failure to follow these overtime approval procedures may subject the employee to disciplinary action, up to and including termination of employment, for violating the overtime approval procedures.

3.10 Timekeeping

All San Diego LAFCO employees must accurately report all work time to the nearest five (5) minutes. All time spent for the benefit of the Commission must be reported as hours worked on time records so that the employee is paid for all work. Overtime-eligible employees may not "volunteer" work time to perform duties that are the same or similar as their stated or regular job duties. Employees have no authorization to work without compensation. No supervisor has authority to request overtime-eligible employees to volunteer work time at LAFCO.

3.11 Pay Days

San Diego LAFCO employees are paid biweekly on Fridays through the County of San Diego Auditor-Controller's Office. Biweekly means the 14-day period commencing on August 16, 1974 and ending at midnight of the second Thursday thereafter and each subsequent 14-day period.

3.11.1 Direct Deposit

San Diego LAFCO employees may choose direct deposit with their own bank or with the San Diego County Credit Union. Employees with an account at the San Diego County Credit Union, may receive their pay up to one day in advance on Thursdays. Employees who choose this method of payment must complete a form authorizing the Commission to take this action. Forms are available from the Department Human Resources Officer.

3.12 Attendance

San Diego LAFCO employees are required to seek advance permission from their supervisor and/or manager for any foreseeable absence or deviation from regular working, break, and mealtimes. An employee who is unexpectedly unable to report for work as scheduled must notify their immediate supervisor no later than the beginning of the employee's scheduled work time and report the expected time of arrival or absence. If the immediate supervisor is not available, the employee must notify the Executive Officer or Assistant Executive Officer.

Arriving late to work or leaving early in connection with scheduled work times, breaks, or meal periods is prohibited, without prior authorization. An employee who fails to timely notify the supervisor of any absences as required by this policy, or who is not present and ready to work during all scheduled work times will be considered to have an unauthorized tardy or absence and will not receive compensation for the period of absence.

3.12.1 Excessive Tardiness

Excessive tardiness occurs when an employee who, without authorization, is late to work or late to return from breaks more than three times during any 30-day period. Excessive absenteeism occurs when the number of unapproved absences for reasons that are not permitted by federal or state law, exceeds three days in any three-month period. Excessive tardiness or absenteeism may be grounds for discipline, up to and including termination of employment.

3.12.2 Abuse of Leave

Abuse of leave is a claim of a right to leave when the employee does not meet the requirements for taking the leave, and may be grounds for discipline, up to and including termination of employment. Should the Commission suspect that there is an abuse of leave by an employee, the employee may be required to submit a physician's certificate to support the absence.

3.13 Dress Code

San Diego LAFCO employees are required to dress appropriately during their regular work hours. The following dress code regulations shall apply to all employees – fulltime, part time, seasonal, etc. – and distinguished between office telecommuting attendance. These standards are considered baseline expectations; employees are free to wear more formal attires should they prefer. If an employee has questions about how these standards apply to them, the matter should be immediately raised with their supervisor and/or manager.

3.13.1 Office Attire

While at the San Diego LAFCO office, all employee's dress attire must be professional and reflect a business casual appearance Monday through Thursday. Clothing and footwear must be neat, clean, in good repair, and appropriate. Acceptable attire includes:

- Blazers, peacoats, vests, and cardigans.
- Slacks or dress pants, khakis, and chinos.
- Professional maxi or knee-length dresses, skirts, and jumpsuits.
- Button-down shirts, sweaters, blouses, or polo shirts.
- Tank tops allowed if paired with a blazer, jacket, or cardigan.
- Closed-toed shoes such as loafers, oxfords, boots, pumps, or flats.
- Open-toed shoes are allowed; however, flipflops are not permitted.
- Simple, professional accessories such as scarves and belts.

Employees should use their professional judgement in appropriately formalizing their attire when attending Commission meetings.

Employees working at the LAFCO office on Fridays are welcomed to dress more casually so long as clothes remain neat, clean, and in good repair. Jeans are allowed if free of any tears, fading or fraying. The following exceptions apply and are not allowed at any time: gym or workout attire; shirts or t-shirts with images or designs; and flipflops.

3.13.2 Telework Attire

While teleworking, San Diego LAFCO employees must remain available by video during their regular workday. Accordingly, employees should generally follow the same attire standards applied at the LAFCO office whenever on video camera.

3.14 Appearances

San Diego LAFCO employees are expected to project a professional appearance while at work and must abide by the standards below.

3.14.1 Tattoos

Permanent or temporary tattoos are not allowed anywhere on the head or face of a San Diego LAFCO employee. Any visible tattoos cannot be obscene, sexually explicit, discriminatory to sex, race, religion, or national origin, extremist, and/or gang related. Any non-conforming tattoos must be covered while at work, irrespective of place.

3.14.2 Body Piercings

No objects, articles, jewelry, or ornamentation of any kind shall be attached to or through the skin if visible on any body part including the tongue or any part of the mouth. Any non-conforming piercing should be removed, covered with a bandage, or replaced with a clear, plastic spacer.

3.15 Employee Records

3.15.1 Personnel Files

San Diego LAFCO's personnel files are confidentially maintained according to state and federal guidelines. The Commission maintains a personnel file on each employee. Files are kept for at least three years after separation of employment. A personnel file will contain only material that the Commission considers necessary and relevant or that is required by law. Personnel files are the property of the Commission and access to the information they contain is restricted to protect employee privacy interests.

Upon reasonable notice and during normal business hours on normal business days, current and former employees, or a representative of the employee, may review their official personnel file in the presence of the Executive Officer or designee. Employees are permitted to see any records regarding qualification for employment, promotion, wage increases, earnings and deductions, or discipline. Employees may, upon written request, receive copies of documents from their personnel files; only documents that they have signed may be copied. Employees may respond to anything in writing that is in the personnel file, including any negative information, and may request that the response be included in their file. The file is the property of the Commission; employees may not remove or add items to their file without Commission approval; and the file must always remain in the custody of the Commission.

Employees may designate a representative to conduct the inspection of the personnel record or receive a copy. However, a designated representative must be authorized in writing to inspect or receive a copy of the personnel record. The Commission may take reasonable steps to verify the identity of the designated representative.

3.15.2 Personal Employee Information

San Diego LAFCO employees are responsible for updating their personal information using the County of San Diego's online self-service application – InSite – which is accessible on the Commission's computer network. This includes updating any changes in name, address, telephone number, driver's license, number of dependents, marital status, beneficiary, education certificates or any other pertinent information All updates entered on InSite are automatically forwarded to the Executive Officer and added to the personnel file.

3.15.3 Release of Employee Information

San Diego LAFCO is authorized to release information to verify the position, salary, and employment dates only for Commission employees. No other reference information will be released. Any other information, including address and phone numbers, may be released only with a written authorization from the employee. All reference inquiries regarding Commission employees should be referred to the supervisor. Employees will be notified of any requests for personal information unless the Commission is prevented from doing so by court order, federal, or state law. Legal requests for information should also be referred to the supervisor.

3.15.4 Medical Files

All medical information about an employee or applicant at San Diego LAFCO is kept in separate medical files and is treated as confidential. Access to employee or applicant medical information is strictly limited to those with a legitimate need to have such information for Commission business reasons, or if access is required by law, subpoena, or court order. In the case of an employee with a disability, supervisors may be informed about necessary restrictions on the work or duties and necessary accommodations.

3.16 Training

San Diego LAFCO employees may be assigned to attend training programs, seminars, conferences, lectures, meetings for the benefit of the Commission or the individual employees. Such training assignment is subject to approval by the Executive Officer or designee, and the Commission will pay for associated fees and necessary and approved travel expenses.

Employee attendance at assigned training activities will be considered hours worked and will be compensated in accordance with normal payroll practices. Procedures to request and obtain reimbursement for approved training-related costs can be found in Section B. (Working Conditions, Travel and Expense Reimbursement).

3.16.1 Mandatory Attendance

Employee attendance at assigned training programs, seminars, conferences, lectures, and related meetings occurring during their regular work hours is not optional.

3.16.2 Optional Attendance

Employee attendance at assigned training programs, seminars, conferences, lectures, and related meetings occurring beyond their regular work hours – such overnight conferences – is discretionary. Nonetheless, and with appreciation to manage dependent care obligations, the Commission expects the employee to make good-faith efforts to accommodate their availability in coordination with their supervisor and/or manager.

3.16.3 Exclusions

This policy does not apply to an employee's self-sponsored attendance at formal or informal educational sessions, even if these sessions generally may lead to improved job knowledge or performance. While the Commission generally encourages all employees to improve their knowledge and job skills, these activities do not qualify for reimbursement or compensation under this policy unless prior written approval is obtained.

3.17 Benefits

The Commission may contract for retirement, health and medical benefits for its employees pursuant to Section 56385 of the Government Code. San Diego LAFCO offers a variety of benefits to employees through contracts with the County of San Diego and San Diego County Employee Retirement Association (SDCERA). At hire, open enrollment, or when applicable, benefits for which an employee is eligible will be offered. Below is a snapshot of benefits provided to eligible employees:

- Healthcare
  Medical, Dental, Vision, Employee Assistance Program, Life, and Short Term & Long-Term Disability

- Retirement & Savings
  Defined Benefit Pension, Health Care Flexible Spending Account, and Dependent Care Flexible Spending Account, Health Savings Account

- Unique Perks
  Flex Credits, Tuition Reimbursement, Transit Pass Stipend, Perk Spot Discounts

Employees have access to up-to-date information on benefit Offerings – among other items – are made available via the following link:

https://www.sandiegocounty.gov/content/sdc/hr/EmployeeBenefits.html

3.17.1 Transit Pass Stipend

San Diego LAFCO pays the same amount to LAFCO employees as County employees towards a monthly San Diego County Transit or Coaster pass; the employee pays the balance depending on the type of pass purchased. The current monthly amount paid to County employees is $85.

3.18 Workers Compensation

All employees at San Diego LAFCO are covered under the California Workers' Compensation laws. The workers' compensation system provides for coverage of medical treatment and expenses, occupational disability leave, rehabilitation services, as well as partial payment for lost wages due to work related injuries or illness. Procedures established by the County of San Diego for Workers Compensation must be followed alongside the steps below.
To ensure that employees receive any Workers' Compensation benefits to which they may be entitled, the following steps are required:

- Immediately report any work-related injury to their supervisor or manager;
- Seek medical treatment and follow-up care as necessary;
- Complete the Employee's Claim Form (DWC Form 1), along with other required forms, provided by the Commission and return it to the supervisor; and
- If medically advised, provide the Commission with a medical certification regarding the need for Workers' Compensation disability leave, as well as the eventual ability to return to work from the leave.

Upon submission of a medical certification that an employee can return to work after a workers' compensation leave, the employee, under most circumstances, will be reinstated to the same position held at the time the leave began, or to an equivalent position, if available. An employee returning from a workers' compensation leave has no greater right to reinstatement than if they had been continuously employed rather than on leave.

3.18.1 Leave & Benefits

Should a San Diego LAFCO employee receive Workers' Compensation benefits while on leave, reconciliation may be needed to remit any excess monies paid beyond their regular pay. In these circumstances, and when employee authorizes, the difference between the benefit amount established by Workers' Compensation and the employee's regular pay will be deducted from the employee's accumulated leave balances - such as sick leave, vacation, and/or other personal leave if available. The employee will continue in pay status and receive pay until their accumulated sick leave, vacation days, or other personal leave have been depleted to the nearest hour.

During the time the employee is in fully paid status while absent from work by reason of injury or illness covered by Workers' Compensation, sick leave and vacation benefits will continue to accrue as though they were on a leave of absence.

Any employee subject to this policy who depletes their accumulated sick leave, vacation days or other personal leave while absent from work by reason of an injury or illness covered by Workers' Compensation may receive an unpaid leave of absence and continuation of health care benefits consistent with state and/or federal law.

3.18.2 Dishonesty

Employees who are found to abuse, or fraudulently use these temporary disability provisions may be subject to corrective action up to and including termination.

3.19 Separation of Employment

Separation of employment at San Diego LAFCO can be either voluntary or involuntary and may be initiated either the employee or the Commission.

3.19.1 Voluntary Separation

A San Diego LAFCO employee who wishes to resign their employment should submit written notice of resignation to the Executive Officer generally, two weeks prior to the planned separation date. The written notice should state the reasons for the resignation. A resignation becomes final when the Executive Officer accepts the resignation in writing.

3.19.2 Involuntary Separation / Discharge

An involuntary separation/discharge is one that is initiated by San Diego LAFCO for any reason other than a reduction in work force.

3.19.3 Job Abandonment

A San Diego LAFCO employee is believed to have resigned from their position if they are absent for three consecutive scheduled workdays without prior authorization and notification to their supervisor, and without extraordinary circumstances that can be verified. The last day worked will be the date of separation.

3.19.4 Layoff

A layoff is normally an involuntary termination that is initiated by San Diego LAFCO because of reorganization, position elimination, declining operations/lack of work, or lack of funds and not otherwise caused by the affected employee. Layoffs will be determined by positions(s) at the sole discretion of the Commission with or without a recommendation from the Executive Officer. Generally, positions identified for layoff will be those determined to be the least vital to the continuation of Commission operations even if service levels or types are reduced or modified, or other jobs become subject to reorganization and a change in job duties.

If more than one employee occupies a position identified for layoff, comparative consideration as to which employee will be laid off will be based on merit with consideration given to skills and qualifications possessed, performance records and work history. Any employee laid off will be placed on a rehire list for not less than one year from the date of separation and will be given preference over external applicants in the event the same position, or substantially similar position having reasonable similar requirements, becomes available during that period.

3.19.5 Return of Commission Property

All San Diego LAFCO property in the employee's possession must be returned prior to separation. This includes, but not limited to, keys, key fobs, parking passes, transit cards, identification cards, equipment, laptops and related accessories, credit cards, gas cards, cell phones, and any other Commission holdings.

3.19.6 Job References/Verification of Employment

All reference inquiries and verifications of employment at San Diego LAFCO must be referred to and approved by the Executive Officer. Unless the Executive Officer receives a written waiver signed by the employee, the Commission will release only the employee's dates of employment, last position held, final salary rate, and rehire eligibility. Supervisors and/or managers should not provide information in response to requests for reference checks or verification of employment, unless specifically approved by the Executive Officer on a case-by-case basis.

3.20 Disciplinary Process

San Diego LAFCO employees are expected and required to perform to the best of their abilities at all times. Any employee who fails to perform at least at a satisfactory level, who violates a Commission policy, or who otherwise engages in inappropriate conduct may be subjected to discipline, up to and including termination of employment.

While employment may be terminated at will by the employee or the Commission at any time, the Commission may choose to exercise its discretion to use forms of discipline that are less severe than termination in certain cases. Examples of less severe forms of discipline include, but are not limited to written reprimand, suspension, reduction in salary, and demotion. Although one or more forms of discipline may be administered with respect to a particular employee, no formal order or progressive system is necessary or required.

The existence and availability of this process does not change in any way whatsoever the at-will nature of employment, does not grant any property interest nor right in employment, or grant due process rights.

3.20.1 Grounds for Discipline

Regular employees at San Diego LAFCO may be disciplined for, including but not limited to, any of the following causes of discipline.

- Violation of any Commission policy, rule, regulation, ordinance, or resolution;
- Absence without authorized leave;
- Excessive absenteeism and/or tardiness as determined by the Commission;
- Use of disability leave in a manner not authorized or provided for pursuant to the disability leave policy or other policies of the Commission;
- Making any false statement, omission, or misrepresentation of fact;
- Providing wrong or misleading information or other fraud in securing appointment, promotion, or maintaining employment;
- Unsatisfactory job performance;
- Inefficiency;

- Malfeasance or misconduct, which includes, but is not limited to, the following acts or omissions:

  - Conviction of a felony. "Conviction" is interpreted to be a determination of guilt of the accused by a court, including a plea of guilty or *nolo contendre*, regardless of sentence, grant of probation, or otherwise.

  - The damaging of Commission property, equipment, or vehicles, or the waste of Commission resources through negligence or misconduct.

- Insubordination; or insulting or demeaning the authority of a supervisor or manager;

  - Hostility towards co-workers and/or Commissioners.

  - Dishonesty and/or distorting facts.

  - Theft.

  - Disclosure of confidential Commission information to any unauthorized person or entity.
  - Misuse or unauthorized use of any Commission property, including, but not limited to physical property, tools, equipment, Commission communication systems, Commission vehicles or Intellectual Property.

  - Mishandling of public funds.

  - Falsifying any Commission record.

  - Discourteous treatment of the public or other employees.

  - Failure to cooperate with employee's supervisor or fellow employees.

  - Violation of the Commission's Drug-Free Workplace Policy.

  - Unapproved outside employment or activity that violates the Commission's policy, or other enterprise that constitutes a conflict of interest with service to the Commission.

  - Any conduct that impairs, disrupts, or causes discredit to the Commission, the employee's Commission employment, to the public service, or other employee's employment.

- Failure to comply with OSHA Safety Standards and Commission safety policies or Illness and Injury Prevention Plan.

- Altering, falsifying, and tampering with time records, or recording time on another employee's time record.

- Working overtime without prior authorization or refusing to work assigned overtime.

- Abusive conduct, including malicious verbal, visual or physical actions, or the gratuitous sabotage or undermining of a person's work performance.

3.20.2 Notice of Discipline

All disciplinary actions at San Diego LAFCO involving loss of compensation other than termination (i.e., suspension without pay, reduction in salary, or demotion) are presented to the employee in writing. The written notice of discipline will include:

- The nature and level of the discipline proposed;
- A statement of the facts upon which the discipline is based;
- The policy, rule, or other authority allegedly violated;
- The effective date of the disciplinary action;
- The identity and signature of the Commission representative initiating the discipline;
- Copies of all materials that relied upon in support of the discipline;
- Instructions on how to respond to the discipline; and
- The name of the Commission representative who will hear the employee's response.

3.20.3 Ability to Respond to Discipline

Any San Diego LAFCO employee has the right to respond to a written reprimand, suspension without pay, reduction in salary, or demotion orally or in writing within five (5) calendar days of receipt. An employee's failure to respond within the five (5) calendar days of receipt is a waiver by the employee of their right to respond and an acceptance of the proposed discipline.

3.20.4 Final Decision to Discipline

Upon receipt of and consideration of the employee's response, if any, the Executive Officer will issue a final decision to the employee.

3.21 Termination of Employment

Although always executed for valid business reasons, San Diego LAFCO does not provide written notice of, nor an ability to respond to, any at will termination of employment.

3.22 Complaint Procedure

All employment with San Diego LAFCO is "at will" meaning both the employee and the Commission have the right to terminate the employment relationship at any time, without cause or advance notice.

To resolve work-related issues, if a Commission employee believes that they have been unfairly subjected to an adverse employment action, or adversely affected by a perceived violation, misapplication, or misinterpretation of employment law, or a Commission rule or policy, they may initiate a complaint. Employees who have concerns regarding perceived harassment of discrimination may wish to use instead the special procedure outlined in the Commission's policy prohibiting harassment and discrimination.

3.22.1 Step I of Complaint Procedure

The employee must first meet with the Assistant Executive Officer to discuss the issue within seven calendar days after the employee becomes aware of the concern. The Assistant Executive Officer will attempt to resolve the matter within five calendar days of that meeting.

3.22.2 Step II of Complaint Procedure

If the complaint has not been resolved to the employee's satisfaction at Step I, the employee may take their concern to Step II. To do so, the employee must, within seven calendar days of being advised of the Assistant Executive Officer's proposed resolution mentioned in Step I above, present the issue in writing to the Executive Officer. The Executive Officer will attempt to resolve the complaint by meeting with the supervisor and employee, either jointly or separately, and will communicate a written decision regarding the matter to the employee within 14 calendar days of receiving the written complaint. The Executive Officer's decision is final.

3.22.3 No Retaliation

No retaliatory action will be taken against any San Diego LAFCO employee because they elected to use, or otherwise participate in, this complaint process. Commission employees who violate this non-retaliation provision will be subject to discipline, up to and including termination of employment.

3.22.4 Process

If an employee at San Diego LAFCO is unsure of which step to file a complaint they may file with the Executive Officer and the complaint will be sent to the appropriate level.

Failure of Commission representatives to comply with the time limits allows the employee to appeal to the next level of review, and failure of the employee to comply with the time limits constitutes abandonment of the complaint. However, the parties may extend time limits by mutual written agreement in advance.

The existence and availability of this process does not change in any way whatsoever the at-will nature of employment, does not grant any property interest nor right in employment, nor grant due process rights.

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CHAPTER FOUR
Leave Administration

San Diego LAFCO sets leave and related allowances for all established positions to attract and retain quality employees.

4.1 Holidays

San Diego LAFCO's regular and probationary employees except as otherwise provided, are eligible for the following holidays off with regular pay:

- New Year's Day (January 1st)
- Martin Luther King Day (Third Monday of January)
- Presidents' Day (Third Monday in February)
- Cesar Chavez Day (March 31st)
- Memorial Day (Last Monday in May)
- Juneteenth Day (June 19th)
- Independence Day (July 4th)
- Labor Day (First Monday in September)
- Veterans Day (November 11th)
- Thanksgiving Day (Fourth Thursday in November)
- Friday after Thanksgiving Day
- Christmas Day (December 25th)

In addition to the recognized holidays, and consistent with County benefits, LAFCO employees who have paid service in Payroll 02 of each fiscal year will receive 16 hours of "floating holiday time" which becomes available for use in Payroll 03.

Employees entitled to paid holidays will be paid for the number of hours the employee was scheduled to work had it not been a holiday. An overtime-eligible employee who is required to work on a holiday will receive holiday pay and pay for the actual time worked on the holiday. A part-time employee's holiday pay is prorated based upon the number of regularly scheduled hours in the employee's biweekly pay period in which the holiday occurred.

4.2 Sick Leave

Sick leave is paid leave from work that an employee may use for the following:

- Diagnosis, care, or treatment of an existing health condition of, or preventative care for the employee themselves or any of the following family members of the employee: a child of any age or dependency status; a parent; a parent-in-law; a spouse; a registered domestic partner; a grandparent; a grandchild; or a sibling;

- The need to discharge the required obligations that arise from the death of an immediate family member, or

- For an employee who is a victim of domestic violence, sexual assault, stalking, or other crime in order for the employee to engage in any of the following activities: (1) obtain or attempt to obtain a temporary restraining order or other court assistance to help ensure the health safety or welfare of the employee or their child; or (2) obtain medical attention or psychological counseling, services from a shelter, program or crisis center, or (3) participate in safety planning or other actions to increase safety.

4.2-1 Accrual Rates + Uses

All fulltime regular LAFCO employees are eligible for sick leave with pay according to the schedule established for those positions consistent with the County of San Diego's benefit programs. LAFCO employees are covered under one of three County benefit programs – unclassified (i.e., Executive Officer), management (i.e., Assistant Executive Officer, Analyst series, Communications Associate, etc.), and non-management (i.e., Commission Clerk, etc.) – with current accrual allowances providing a uniform rate of 13 days per year. This current allowance translates to 4 hours for every 80 regular hours worked. For parttime employees, sick leave accrues on a prorated basis according to the percentage of hours worked.

Fulltime regular employees with unclassified and management positions are also credited 80 hours of sick leave at the time of hire. Additional hours do not accrue during pay periods in which time was credited.

A seasonal, temporary, or extra help employee who works 30 or more days within a year from the beginning of employment with the Commission accrues one hour of paid sick leave for every 30 hours worked. Accrued and unused sick leave carries over to the following year of employment but a seasonal, temporary, or extra help employee stops earning sick leave once they have accrued 80 hours or 10 workdays/shifts, whichever is greater.

Any employee may use accrued sick leave subject to the limits and request provisions in this policy.

4.2-2 Notice of Use

If the need for sick leave is foreseeable, an employee must give the Executive Officer or Assistant Executive Officer reasonable advance written or oral notice.

If the need for sick leave is not foreseeable, the employee must provide written or oral notice of the need for the leave as soon as possible.

If the employee is required to be absent on sick leave for more than one day, the employee should keep the Executive Officer or Assistant Executive Officer informed each day as to when the employee expects to return to work and the purpose of the leave. Failure to request sick leave as required by this policy without good reason, may result in the employee being treated as absent without leave.

The Commission may, as allowable by current law and with advance written notification, require an employee to submit a doctor's certificate or other evidence acceptable to the Commission, after five days of protected leave such as kin care or sick leave.

For purposes of sick leave use, family is defined as follows:

- A "child" is defined as a biological, foster, or adopted child; stepchild; or a legal ward, regardless of the age or dependency of the child. A "child" also may be someone for whom you have accepted the duties and responsibilities of raising, even if they are not your legal child.

- A "parent" is defined as a biological, foster, or adoptive parent; stepparent; or legal guardian of an employee or the employee's spouse or registered domestic partner. A parent may also be someone who accepted the duties and responsibilities of raising you when you were a minor child, even if they are not your legal parent.

- A "spouse" is defined as a legal spouse according to the laws of California, which do not recognize "common law" spouses (a union that has not been certified by a civil or religious ceremony). All conditions and restrictions placed on an employee's use of sick leave apply also to sick leave used for care of a child, parent, spouse, or domestic partner.

- A "domestic partner" is defined as a legal domestic partner according to the laws of California and who has filed a Declaration of Domestic Partnership with the Secretary of State.

- Grandchild

- Grandparent

- Sibling

- A "designated person" is defined as a person identified by the employee at the time the employee requests paid sick days. The Commission may limit an employee to one designated person per 12-month period for paid sick days.

When an employee is unable to report for duty due to the employee's own illness or that of a family member as defined above, the employee should notify the Executive Officer or Assistant Executive Officer as soon as possible. The employee should report the intended use of sick leave. If the Executive Officer or Assistant Executive Officer is not immediately available, the employee may leave a voice mail message, text, or email, unless otherwise directed.

4.2-3 Restrictions

Sick leave benefits at San Diego LAFCO are intended solely to provide income protection for employees in the event or illness or injury and may not be used for any other absence except as required by law.

4.2-4 Final Disposition

Employees in all LAFCO classes may upon retirement, deferred retirement, disability retirement, or death, convert all or a portion of accrued sick leave balance into retirement service credits subject to the rules and regulations of the of the San Diego County Employees Retirement Association, provided: (a) the employee has completed five (5) or more years of continuous service during that employee's present employment; and (b) the employee's sick leave balance totals 100 hours or more.

In addition, upon retirement or termination of service with the Commission, employees within benefit designation 01 (Executive Officer) may also elect to receive cash payment for all or a portion of unused sick leave credits equal to 50% of its value. One hundred (100%) of all sick leave credits that are paid to the employee in cash at 50% will be removed from the employee's sick leave balance.

4.3 Vacation

Vacation leave is paid leave from work that a San Diego LAFCO employee may use for any purpose.

4.3-1 Accrual Rates + Caps

All fulltime regular employees are eligible for vacation with pay according to the schedule established for those positions by San Diego LAFCO and consistent with the County of San Diego's benefit programs. LAFCO employees are covered under one of three County benefit programs – unclassified, management, and non-management – with current accrual allowances as follows:

Benefit Program	Vacation Accrual, Annual	Maximum Accrual
Unclassified	15 days for 1-4 years of service (120 hours) 20 days for 5-14 years of service (480 hours) 25 days for 15+ years of service (600 hours)	360 hours 480 hours 600 hours
Management	12 days for 1-4 years of service (80 hours) 17 days for 5-14 years of service (120 hours) 22 days for 15+ years of service (160 hours)	240 hours 340 hours 440 hours
Non-Management	10 days for 1-4 years of service (80 hours) 15 days for 5-14 years of service (120 hours) 20 days for 15+ years of service (160 hours)	200 hours 300 hours 400 hours

Vacation time for part-time professional or support employees is computed based on the number of hours in the normal work week as established for that part- time employee by the Executive Officer.

4.3-2 Accrual Uses

Vacation time credit begins to accrue upon hire at San Diego LAFCO. Employees may use accrued vacation time pursuant to Section 4.3-3.

4.3-3 Request to Use

All employees must first request and receive permission from their supervisor and/or manager before using vacation time to help ensure San Diego LAFCO is sufficiently staffed to meet day-to-day operations. The following noticing protocols apply:

- Any vacation time that involves three or more consecutive workdays should be requested and approved at least three weeks in advance.
- Any vacation time that involves two or less consecutive workdays should be requested and approved at least one week in advance.
- Any vacation time that involves less than one-half day of the employee's normal workday can be requested and approved the day before.

4.3-4 Final Disposition

Upon separation of employment at San Diego LAFCO, an employee will be compensated in cash for the unused vacation time. The cash compensation for unused vacation time is computed based on the employee's rate of pay at the time of termination but will not count toward the retirement benefit formula.

4.4 Family Medical Leave

In accordance with the California Family Rights Act (CFRA), San Diego LAFCO employees are provided up to 12 work weeks of unpaid family/medical leave within a 12-month period, or 26 workweeks to care for a covered military service member proportional to the employee's average hours work. The California Family Rights Act (CFRA) Leave policy may be found at Appendix B.

4.5 Pregnancy Disability Leave (PDL)

San Diego LAFCO employees who are disabled because of pregnancy, childbirth or related medical conditions are provided an unpaid leave of absence for the period of disability up to a maximum of 17 1/3 weeks per pregnancy. Employees are entitled to pregnancy disability leave on a pro-rated basis proportional to an employee's average hours work. Time off needed for prenatal care, severe morning sickness, doctor ordered bed rest, childbirth and recovery from childbirth will all be counted as pregnancy disability leave. The Pregnancy Disability Leave (PDL) policy can be found at Appendix B, California Family Rights Leave (CFRA) / Pregnancy Disability Leave.

4.6 Unpaid Leave of Absence

Regular employees at San Diego LAFCO may be eligible for an unpaid leave of absence approved by the Executive Officer for urgent and substantial reasons, for up to a maximum of one (1) year, providing satisfactory arrangements can be made to perform the employee's duties without undue interference with the normal routine of work. Unpaid leaves for up to sixty (60) days for a regular employee may be approved by the Executive Officer. Any accrued vacation time (and sick leave if law permits) must be taken before unpaid time is granted.

4.7 Victims of Violent Crimes

San Diego LAFCO employees who are victims of domestic violence, sexual assault or stalking are eligible for paid leave using accrued leaves, according to the California Family Rights Act and will be provided reasonable accommodation. Employees may use available accrued leave, or unpaid leave.

Employees may request leave if they are involved in a judicial action, such as obtaining restraining orders, appearing in court to obtain relief to ensure their health, safety, or welfare, or that of their child or to seek medical/psychological treatment including safety planning.

4.8 Military Orders

Any San Diego LAFCO employee who is ordered to serve as a member of the state militia or the United States Army, Navy, Air Force, Marine Corps, Coast Guard, or any

division thereof will be granted a military leave according to applicable state or federal laws upon providing the Executive Officer with a copy of the military orders. Upon the termination of service or upon honorable discharge, the employee may be entitled to return to the employee's position, provided the position still exists, according to applicable state or federal laws.

4.8-1 Military Family Medical Leave Entitlements

Qualified Exigency Leave. Eligible employees with a spouse, son, daughter, or parent in regular Armed Forces or National Guard or Reserves in support of a contingency operation, or an employee's domestic partner who is on active duty or call to active-duty status in the National Guard or Reserves in support of a contingency operation, may use their 12-week CFRA leave entitlement to address certain qualifying exigencies.

Qualifying exigencies may include addressing needs arising from short-notice deployment, attending certain military events, arranging for alternative childcare, addressing certain financial and legal arrangements, addressing needs related to the care of the military member's parent who is incapable of self-care, attending certain counseling sessions, to spend up to 15 calendar days with a military member who is on R and R leave, and attending post-deployment reintegration briefings.

Leave is permitted to care for a spouse, son, daughter, parent, or "next of kin" who is a covered service member of the U.S. Armed Forces who has a serious injury or illness: incurred in the line of duty while on active military duty; or existed before the beginning of the member's active duty and was aggravated by service in the line of duty on active duty in the Armed Forces. This leave can run up to 26 weeks of unpaid leave during a single 12-month period. Contact the General Manager for further information.

4.9 Bereavement Leave

San Diego LAFCO provides paid bereavement leave for employees for up to five days. Employees may take bereavement leave in the event of death of any of the following family members: employee's current spouse, domestic partner, child, parent, legal guardian, brother, sister, grandparent, or grandchild; or mother-, father-, sister-, brother-, son-, or daughter-in-law. Exceptions to this list of qualifying family members may be made on a case-by-case basis by the Executive Officer. This benefit is provided for the purpose of attending memorial or burial services and or handling related matters**.** Refer to the definition of "child", "parent", "spouse" or "domestic partner" under the Sick Leave policy.

Effective January 1. 2024, Bereavement Leave is available for employee who experience a Reproductive Loss.

4.10 Jury Duty / Court Appearances

San Diego LAFCO provides paid jury duty pay to regular and probationary employees. Employees are to provide appropriate verification to the Executive Officer. If an employee is provided jury duty pay, the employee should remit, within 15 calendar days of receipt, all fees received for serving as a juror except those fees specifically allowed for mileage and expenses,

An employee who is subpoenaed to appear in court as a witness in a judicial proceeding related to the Commission will receive regular pay for such time. An employee subpoenaed to appear in court in a matter unrelated to their official Commission capacity, or who is appearing in court in a matter initiated by the employee, is permitted time off without pay, or if the employee chooses, to use accrued vacation for such purpose, if eligible for such leave.

4.11 Time Off to Vote

Any employee at San Diego LAFCO who does not have sufficient time outside of working hours to vote, may request up to two (2) hours of paid leave either at the beginning or end of scheduled working hours to enable them to vote. The employee must request time off to vote from the Executive Officer at least two (2) days prior to Election Day.

Adoption History: Article VI
Adopted April 14, 1975
Amended April 4, 1977
Amended October 2, 1978
Amended March 3, 1980
Amended July 12, 1982
Revised May 5, 1986
Amended September 11, 1989
Amended November 6, 1989
Amended August 2, 1993
Amended April 4, 1994
Re-affirmed and adopted December 4, 2000
Administratively revised and updated May 24, 2005
Amended August 7, 2006
Re-affirmed annually via adoption of LAFCO Budget
Comprehensively Updated and re-adopted March 3, 2008
Amended November 5, 2012 (Sections 6.1& 6.11)
Amended August 5, 2013 (Section 6.8)
Amended April 7, 2014
Amended June 5, 2017
Administratively revised and Updated August 5, 2019
Updated March 1, 2021 to include Section 6.21
Amended and Updated March 2024

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APPENDIX A

POSITION SPECIFICATIONS

Executive Officer
Assistant Executive Officer (*amended position June 5, 2023*)
Local Governmental Analyst III
Local Governmental Analyst II
Local Governmental Analyst I / Administrative Analyst
Communications Associate
Commission Clerk Administrative Assistant (Executive Assistant)
Administrative Assistant (General Administrative Support)
Administrative Assistant (General Governmental Services)
Administrative Aide
Records Clerk
Geographic Information Systems (GIS) Analyst

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LOCAL AGENCY FORMATION COMMISSION
SAN DIEGO COUNTY

POSITION SPECIFICATION

EXECUTIVE OFFICER

Definition

Executes the policies and directives of the Local Agency Formation Commission and is responsible for administering and supervising day-to-day activities, duties, and responsibilities of the Commission.

Typical Tasks

Serves as principal staff advisor to the Commission; prepares background data, report, and recommendation on each proposal submitted to the Commission; prepares agenda for Commission meetings; attends all meetings and presents oral reports and advises the Commission during the course of meetings; executes all required legal documents and attests to all determinations of the Commission; advises the Commission on and must be knowledgeable of state statutory provisions affecting LAFCO.

Arranges for and conducts pre-meeting conferences with proponents and other interested persons and groups; arranges for and attends meetings of the Special Districts and Cities Advisory Committees; establishes liaison and confers with elected and appointed officers of the County and the cities and special districts within the county; coordinates activities and maintains liaison with County agencies and departments; conducts or arranges for studies concerning local agencies within the county; provides advice and assistance to local agencies, groups or persons on procedures and policies of LAFCO; represents LAFCO before community groups, local legislative bodies, and state departments and legislative committees; represents the San Diego LAFCO at state-wide LAFCO meetings and conferences.

Prepares annual LAFCO budget and monitors accounts; supervises and rates performance of other Commission employees.

Distinguishing Characteristic

This is a one-position class specifically authorized by Section 56384 of the Government Code. Incumbents are directly appointed by and serve at the pleasure of the Commission.

Qualifications

Education: Graduation from an accredited four-year college or university, preferably with a degree in political science or public administration; graduate work in the above fields is highly desirable.

Experience: Within the last ten years, must have had at least five years of progressively responsible administrative experience, three years of which must have included work involving local governmental agencies; work with agencies in metropolitan areas in California is highly desirable.

LOCAL AGENCY FORMATION COMMISSION
SAN DIEGO COUNTY

POSITION SPECIFICATION

ASSISTANT EXECUTIVE OFFICER

Definition

The Assistant Executive Officer is a single-class position. The position serves as the second highest ranking staff member under the general direction of the Executive Officer. The position performs a variety of complex duties including providing administrative, analytical, technical, and public relations support to the Executive Officer.

Typical Tasks

The Assistant Executive Officer supports the Executive Officer and acts in place of the Executive Officer in their absence. The position provides quality assurance in the implementation of the Commission's adopted workplan consistent with the practices and standards set by the Executive Officer. This includes helping to oversee staff deliverables as well as serving as project manager for significant and otherwise complex proposals and studies. The position prepares and reviews agenda reports, aids in the development and implementation of the annual budget and makes verbal and written reports to the Commission. The Executive Officer is not precluded from assigning other related functions if such functions are a logical assignment for the position.

Supervision Received and Exercised

The Assistant Executive Officer receives direct supervision from the Executive Officer.
The position exercises front-line supervision of other staff.

Qualifications

The examples of knowledge and abilities listed in this class specification are representative but not necessarily exhaustive. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform functions on a case-by-case basis.

The position requires knowledge of all of the following:

- LAFCO statutes and related procedures at a comprehensive level
- Legislative and related rule-making processes in California
- Composition and characteristics of local government in San Diego County
- Best principles and practices of public administration, community development and planning, public finance, and human resources
- California Environmental Quality Act and how to effectively interpret and administer

- Organization and management practices as applied to the analysis and evaluation of programs, policies, and operations
- Business English
- Telephone, office, and online etiquette

The position requires of all the following abilities:

- Anticipate political implications of project alternatives and recommendations
- Simplify – writing and verbally – otherwise complex public policy topics
- Strategically develop, time, and implement and/or oversee projects
- Prioritize projects to maximize budgeted and/or available resources
- Perform high-level qualitative and quantitative analysis
- Write intricate reports with conclusions and recommendations
- Compose clear and concise written memos, e-mails, and letters
- Skillfully proof and edit others written reports, letters, etc.
- Verbally present materials clearly, concisely, and effectively
- Exercise independent judgement and initiative

Distinguishing Characteristics

The Assistant Executive Officer position requires a comprehensive understanding of LAFCO statute. The position requires independent judgment, a well-developed sense of direction, and must be able to exercise discretion concerning sensitive matters. The individual must possess excellent communication skills and have the ability to carry out a project from the conceptual state through implementation. The Assistant Executive Officer should possess the knowledge, abilities, and experience to act in place of the Executive Officer when necessary. Distinguishing characteristics include managing complex and/or controversial proposals and studies along with regularly representing LAFCO to the general public and other local governmental agencies. The position relatedly requires ongoing self-direction and astute judgement in accomplishing assigned projects and ability to independently assess political implications of findings, recommendations, and decisions.

An adaptive ability to practice and cultivate effective teamwork and collaboration as a first-line supervisor for other staff also distinguishes this position.

Education and Experience

Graduation from an accredited four-year college or university with a bachelor's degree in public administration, political science, urban studies, economics, or a related field. A master's degree in one of these fields is highly encouraged and desirable.

At least five years of responsible experience that would provide the knowledge and skills to perform the typical tasks of the position with no less than one year involving supervisorial duties – whether over personnel, programs, or projects. Experience with a

state or local governmental agency is considered beneficial but not required. Previous experience should provide familiarity with issues of local government organization such as the planning process, public finance, and community development.

Physical Working Conditions

Work primarily takes place in an office environment, although the position may be assigned to other work locations – including the accommodation of telework up to 50% of standard hours if authorized by the Executive Officer. Work involves exposure to computer screens and use of basic office equipment.

The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the position. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions, on a case-by-case basis. Typical and expected work duties include all of the following: continuous upward and downward flexion of the neck; frequent sitting and standing; bending and twisting of the waist; repetitive use of hands to operate computers, printers, and copiers; and lifting of objects weighing up to 20 pounds.

Comprehensive administratively amended and approved June 5, 2023

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LOCAL AGENCY FORMATION COMMISSION
SAN DIEGO COUNTY

POSITION SPECIFICATION

LOCAL GOVERNMENTAL ANALYST III

Definition

The Local Government Analyst III is senior-level professional class of this series. The position is intended to generally function in an organizational role similar to the County of San Diego's Administrative Analyst III position.

With limited supervision, incumbents are responsible for performing administrative and analytical work of above-average to high difficulty; to review, report, and present material relating to jurisdictional change proposals, studies, and/or special projects as assigned.

Typical Tasks

Local Governmental Analyst III incumbents have primary responsibility, under the direction of the Executive Officer or Assistant Executive Officer, to lead in the development, implementation and update of LAFCO's otherwise normal planning and regulatory functions. This includes responsibility for major proposals and study projects, preparing and/or reviewing associated agenda reports and preliminary recommendations and reporting orally and in writing to the Commission and Advisory Committees. May be tasked with staffing an Advisory Committee.

Incumbents help ensure LAFCO compliance with the California Environmental Quality Act.

Incumbents serve as first-level supervisors for Local Government Analysts I/II positions.

Knowledge, Skills, and Abilities

The examples of knowledge, skills, and abilities listed in this class specification – Local Governmental Analyst III – are representative but not necessarily exhaustive. The Executive Officer or Assistant Executive Officer is not precluded from assigning other related functions not listed herein if such functions are a logical assignment for the position. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform associated functions on a case-by-case basis.

- Expert understanding of LAFCO statute and related procedures
- Understand political implications of findings, recommendations, and decisions
- Plan and implement projects as assigned with limited supervision
- Knowledge of government organization functions and services
- Advanced understanding of the California Environmental Quality Act
- Familiar with principles and practices of public administration, community development and planning, and public finance

- Ability to collect, analyze, and interpret relevant data
- Perform advanced-level qualitative and quantitative analysis
- Compose written memos, letters, and agenda reports
- Skillfully proof and edit others written reports, letters, etc.
- Business English
- Communicate clearly, concisely, and effectively orally and in writing
- Current technology and trends in the profession
- Telephone, office, and online etiquette
- Communicate effectively with individuals representing diverse cultures and backgrounds
- Exercise good judgement and initiative
- Communicate effectively with individuals representing diverse cultures and backgrounds

Distinguishing Characteristics

The Local Governmental Analyst III is a senior level of the Local Governmental Analyst series with increased responsibilities and duties compared to the Analyst I/II positions. Distinguishing characteristics include being assigned substantive to complex proposals and studies along with regularly representing LAFCO to the general public and other local governmental agencies. The position relatedly requires ongoing self-direction and sound judgement in accomplishing assigned projects from the conceptual stage through implementation and ability to readily assess political implications of findings, recommendations, and decisions.

An adaptive ability to practice and cultivate effective teamwork and collaboration as a first-line supervisor also distinguishes this position from others in the series.

Qualifications

Education: Graduation from an accredited four-year college or university with a bachelor's degree in public administration, political science, urban studies, economics or a related field. A Master's Degree in one of these fields is highly encouraged and desirable.

Experience: At least four years of responsible experience that would provide the knowledge and skills to perform the typical tasks of the position. Experience with a state or local government agency is considered beneficial but not required. Previous experience should provide familiarity with issues of local government organization such as the planning process, public finance, and community development.

Special Notes

Working Conditions

Work primarily takes place in an office environment, although the position may be assigned to other work locations – including the accommodation of telework up to 50% of standard hours if authorized by the Executive Officer. Work involves exposure to computer screens and use of basic office equipment.

Essential Physical Characteristics

The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this classification. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions of a job, on a case-by-case basis.

- Continuous: upward and downward flexion of the neck.
- Frequent: sitting, repetitive use of hands, grasping, and fine manipulation of hands to operate computers, printers, and copiers, lifting of objects weighing up to 10 pounds.
- Occasional: walking, standing, bending and twisting of the neck, bending and twisting of the waist, grasping, pushing, pulling, reaching above and below shoulder level, and lifting objects weighing up to 25 pounds.

Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

Comprehensive administratively amended and approved June 6, 2022

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LOCAL AGENCY FORMATION COMMISSION
SAN DIEGO COUNTY

POSITION SPECIFICATION

LOCAL GOVERNMENTAL ANALYST II

Definition

The Local Governmental Analyst II is the intermediate level professional class of this series. The position is intended to generally function in an organizational role similar to the County of San Diego's Administrative Analyst II position.

With general supervision, incumbents are responsible for position to performing administrative and analytical work of above-average difficulty; to review, report, and present material relating to jurisdictional change proposals, studies, and/or special projects as assigned.

Typical Tasks

Local Governmental Analyst II incumbents have primary responsibility, under the direction of the Executive Officer or Assistant Executive Officer, to assist in the development, implementation and update of LAFCO's otherwise normal planning and regulatory functions. This includes responsibility for moderate to major proposal and study projects, preparing associated agenda reports and preliminary recommendations, and reporting orally and in writing to the Commission and Advisory Committees. May be tasked with staffing an Advisory Committee.

Incumbents assist higher-level staff to ensure LAFCO compliance with the California Environmental Quality Act.

Incumbents serve as a resource to advise the Local Government Analyst I position.

Knowledge, Skills, and Abilities

The examples of knowledge, skills, and abilities listed in this class specification – Local Governmental Analyst II – are representative but not necessarily exhaustive. The Executive Officer or Assistant Executive Officer is not precluded from assigning other related functions not listed herein if such functions are a logical assignment for the position. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform associated functions on a case-by-case basis.

- Advanced understanding of LAFCO statute and related procedures
- Knowledge of government organization functions and services
- Understanding of the California Environmental Quality Act
- Familiar with principles and practices of public administration and public finance
- Ability to collect, analyze, and interpret relevant data

- Perform intermediate-level qualitative and quantitative analysis
- Compose written memos, letters, and agenda reports
- Business English
- Communicate clearly, concisely, and effectively orally and in writing
- Current technology and trends in the profession
- Telephone, office, and online etiquette
- Communicate effectively with individuals representing diverse cultures and backgrounds
- Exercise good judgement and initiative
- Communicate effectively with individuals representing diverse cultures and backgrounds

Distinguishing Characteristics

The Local Governmental Analyst II is an intermediate level of the Local Governmental Analyst series with increased responsibilities and duties compared to the Analyst I position. Distinguishing characteristics include being assigned advanced to substantive proposals and studies as well as increased interface with the general public and other local government agencies. The position requires independent and sound judgment to comply with appropriate laws, regulations, and proceedings and well-developed sense of discretion, and ability to practice and cultivate effective teamwork and collaboration within and outside LAFCO.

Qualifications

Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. Qualifying education and experience follows:

Education:

Graduation from an accredited four-year college or university with a bachelor's degree in public administration, political science, urban studies, economics or a related field. A master's degree in one of these fields is beneficial, but not required.

Experience:

At least three years of responsible experience performing research and analytical work, personnel, budget, finance, or customer service. Education beyond the bachelor's degree may also substitute for one year of experience.

Special Notes

Working Conditions

Work primarily takes place in an office environment, although the position may be assigned to other work locations – including telework up to 50% of standard hours if

authorized by the Executive Officer. Work involves exposure to computer screens and use of basic office equipment.

Essential Physical Characteristics

The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this classification. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions of a job, on a case-by-case basis.

- Continuous: upward and downward flexion of the neck.
- Frequent: sitting, repetitive use of hands, grasping, and fine manipulation of hands to operate computers, printers, and copiers, lifting of objects weighing up to 10 pounds.
- Occasional: walking, standing, bending and twisting of the neck, bending and twisting of the waist, grasping, pushing, pulling, reaching above and below shoulder level, and lifting objects weighing up to 25 pounds.

Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

Comprehensive administratively amended and approved June 6, 2022

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LOCAL AGENCY FORMATION COMMISSION
SAN DIEGO COUNTY

POSITION SPECIFICATION

LOCAL GOVERNMENTAL ANALYST I / ADMINISTRATIVE ANALYST

Definition

The Local Governmental Analyst I is the entry level professional class of this series. The position is intended to generally function in an organizational role similar to the County of San Diego's Administrative Analyst I position.

With direct supervision, incumbents are responsible for performing administrative and analytical work of average difficulty; to review, report, and present material relating to jurisdictional change proposals, studies, and/or special projects as assigned.

The position may be filled at an Administrative Analyst level, depending on the needs of the office and qualifications of the candidate. If filled at the Administrative Analyst level, then the position will also be responsible for a variety of administrative tasks.

Typical Tasks

Local Governmental Analyst I incumbents have responsibility, under the direction of the Executive Officer or Assistant Executive Officer, to assist in the development and implementation of LAFCO's otherwise normal planning and regulatory functions. This includes responsibility for basic proposals and study projects, preparing associated agenda reports and preliminary recommendations, supporting higher-level class positions, and reporting orally and in writing to the Commission and Advisory Committees.

Knowledge, Skills, and Abilities

The examples of knowledge, skills, and abilities listed in this class specification – Local Governmental Analyst I – are representative but not necessarily exhaustive. Management is not precluded from assigning other related functions not listed herein if such functions are a logical assignment for the position. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform associated functions on a case-by-case basis.

- Understanding of LAFCO statute and related procedures
- Knowledge of government organization functions and services
- Familiar with principles and practices of public administration
- Ability to collect, analyze, and interpret relevant data
- Perform entry-level qualitative and quantitative analysis
- Compose written memos, letters, and agenda reports
- Business English

- Communicate clearly, concisely, and effectively orally and in writing
- Current technology and trends in the profession
- Telephone, office, and online etiquette
- Communicate effectively with individuals representing diverse cultures and backgrounds
- Exercise good judgement and initiative

If filled at the Administrative Analyst level, then an emphasis will be placed on the following tasks: compiling information and drafting office policies and procedures; retrieving, gathering, and analyzing information to assist other staff members; interpreting and conveying comprehensive and comprehendible instructions, reports, and regulations by utilizing excellent English language reading, writing, and speaking skills; meeting with the public to answer inquiries or complaints regarding procedures; assisting in planning and coordinating personnel recruitment and selection; supervising and training support staff; organizing and directing publication and distribution of Commission agenda and supporting materials; preparing, editing, and proofreading staff reports; preparing or supervising preparation of Commission resolutions for review and signature; preparing and noticing environmental documents as required by legal regulations; and preparing procedural manuals and other publications.

Distinguishing Characteristics

The Local Governmental Analyst I is the entry level of the Local Governmental Analyst series. Distinguishing characteristics include being assigned basic to moderate proposals and studies and interfacing with the general public and other local government agencies. The position requires independent and sound judgement to comply with appropriate laws, regulations, and proceedings while practicing effective teamwork and collaboration within LAFCO. If the position is filled at the Administrative Analyst level, then an emphasis will be placed on administrative analysis and support services.

Qualifications

Education, training, and/or experience that demonstrates possession of the knowledge, skills and abilities listed above. Qualifying education and experience follows:

Education:
Graduation from an accredited four-year college or university with a bachelor's degree in public administration, political science, economics, urban studies, or a related field.

Experience:

At least one year responsible experience performing research and analytical work, personnel, budget, finance, or customer service. Education beyond the bachelor's degree may substitute for experience.

Special Knowledge and Skills Required of Administrative Analyst:
Understanding of basic research methods and available resources as well as basic mathematics and statistics to compute data upon which various administrative projections and decisions are based; comprehension of government organization, procedures, and operations and how they interrelate with office procedures and goals; and proficiency with Word, Excel, Access, or other similar computer programs.

Special Notes

Working Conditions
Work primarily takes place in an office environment, although the position may be assigned to other work locations – including the ability to telework up to 50% of standard hours if eligible and authorized by the Executive Officer. Work involves exposure to computer screens and use of basic office equipment.

Essential Physical Characteristics
The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this classification. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions of a job, on a case-by-case basis.

- Continuous: upward and downward flexion of the neck.
- Frequent: sitting, repetitive use of hands, grasping, and fine manipulation of hands to operate computers, printers, and copiers, lifting of objects weighing up to 10 pounds.
- Occasional: walking, standing, bending and twisting of the neck, bending and twisting of the waist, grasping, pushing, pulling, reaching above and below shoulder level, and lifting objects weighing up to 25 pounds.

Background Investigation
Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

Comprehensive administratively amended and approved June 6, 2022

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LOCAL AGENCY FORMATION COMMISSION
SAN DIEGO COUNTY

POSITION SPECIFICATION

COMMISSION CLERK

Definition

With limited direction, to serve as clerk to the Commission and assist the Executive Officer in managing Commission meetings and all records therein; to perform support staff level work for the Executive Officer and to assist with administrative and other non-routine duties; to perform related work as required.

Typical Tasks

Works with the Executive Officer to schedule all Commission meetings and any standing or ad hoc committees therein; prepares related agenda materials; takes related official meeting minutes; notifies participants; reserves meeting rooms; ensures Commission meeting information is compiled and posted; arranges for Commission food and beverages as appropriate.

Prepare, post, and distribute public hearing notices of the Commission; prepare, publish, and distribute other legal notices in accordance with State of California, County of San Diego, and LAFCO requirements.

Receive, process, and monitor economic interest statements and election process for elected and appointed officials and employees.

Receive and coordinate responses pursuant to the State's Public Records Act.

Coordinate and oversee elections on behalf of the Special Districts Selection Committee; certify election results.

Coordinate with the Executive Officer and designated staff to file and/or record approved and completed jurisdictional changes with the County Clerk-Recorder's Office and State Board of Equalization.

Create, organize, and maintain official records of the Commission – including – but not limited to – applicant proposals, Commission meeting minutes, adopted resolutions, adopted policies and procedures, public records requests and response, and official correspondence.

Serve as direct supervisor to the Administrative Assistant and manage and delegate tasks accordingly.

Other tasks include: performing general support staff duties; screening and routing incoming correspondence; typing correspondence and reports; answering telephone and taking messages; maintaining files; retrieving and gathering information to assist staff members; meeting the public to answer inquiries or complaints regarding procedures.

Distinguishing Characteristics

Serve as Commission Clerk as provided under LAFCO law. Organize own work, coordinate projects, set priorities, and meet critical deadlines in fulfilling typical tasks. Report directly to the Executive Officer.

Minimum Qualifications

Thorough Knowledge of:

- General role of local government and basic responsibilities and duties of LAFCO.
- A wide variety of word processing layouts and formats
- Filing systems, including alphabetical, chronological, numerical, subject area, and tickler.
- Record keeping and clerical monitoring procedures.
- Business English including spelling, punctuation, grammar, capitalization, and word usage.
- The operation and uses of common office equipment including office computers, typewriters, calculators, copiers, and dictaphone machines.
- Modern office procedures and practices.

Skills to:

- Possess strong interpersonal and public relations skills.
- Deal effectively and diplomatically with administrators, officials, and other individuals who transact business with the Executive Officer.
- Independently review and interpret relevant statutes.
- Take and transcribe dictation accurately.
- Possess relevant office/computer skills to use a variety of equipment such as computers, copy machines and software programs (i.e. Microsoft Office).
- Read, understand, follow, and explain policy and procedure.
- Compile and summarize statistical, financial, and other data.
- Compose routine correspondence and reports.
- Make arithmetic calculations.
- Maintain confidentiality.

Education/Experience:

- At least four years of relevant experience, two years of which must have been at a comparable level to the executive assistant or administrative assistant position as determined by the Executive Officer.
- Completion of no less than 60 units from an accredited college or university may be substituted for two years of relevant experience as described above.

- Graduation from an accredited four-year college or university within emphasis in administration, business, or other related fields may be substituted for all four years of the relevant experience as described above.

Established: June 1, 2020

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LOCAL AGENCY FORMATION COMMISSION
SAN DIEGO COUNTY

POSITION SPECIFICATION

ADMINISTRATIVE ASSISTANT
(Executive Assistant)

Definition

With limited direction, to serve as confidential assistant to the Commission's Executive Officer; to perform support staff level work for the Executive Officer and to assist with administrative and other non-routine duties; to perform related work as required.

Typical Tasks

Oversees the Executive Officer's calendar and functions as the liaison between the Executive Officer and the general public; attends meetings with the Executive Officer and other LAFCO staff and takes and transcribes meeting notes.

Works with the Executive Officer in scheduling meetings of the Cities and Special Districts Advisory Committees and prepares related agenda materials; takes and transcribes minutes of meetings of the Special Districts and Cities Advisory Committees; notifies Committee participants; ensures Committee information is compiled and posted; reserves meeting rooms; arranges for Committee food and beverages as appropriate.

Assists the Executive Officer in managing LAFCO finances and ensures timely payments; makes deposits; transfers monies as needed between LAFCO accounts; processes claims, warrants, and travel requests; orders supplies; responsible for payroll and related matters; maintains financial records – including receipts – and assists Executive Officer in preparation of budget.

Responsible for official filings including, but not limited to County Recorder, State Board of Equalization, and County Assessor.

Composes, prepares, and proofreads confidential correspondence, reports, and other complex documents.

Assists the Executive Officer in managing human resources; interfaces with County of San Diego Human Resources as needed; and maintains confidential personnel files.

Other tasks include: performing general support staff and secretarial duties; screening and routing incoming correspondence; typing correspondence and reports; answering telephone and taking messages; maintaining files; retrieving and gathering information

to assist staff members; meeting the public to answer inquiries or complaints regarding procedures; supervising subordinate support staff, such as the Records Clerk.

Distinguishing Characteristics

Provide direct staff support to the Executive Officer. Organize own work, coordinate projects, set priorities, and meet deadlines in fulfilling typical tasks Directly report to the Executive Officer.

Minimum Qualifications

Thorough Knowledge of:

- A wide variety of word processing layouts and formats.
- Filing systems, including alphabetical, chronological, numerical, subject area, and tickler.
- Record keeping and clerical monitoring procedures.
- Business English including spelling, punctuation, grammar, capitalization, and word usage.
- The operation and uses of common office equipment including office computers, typewriters, calculators, copiers, and dictaphone machines.
- Modern office procedures and practices.

Skills to:

- Possess strong interpersonal and public relation skills.
- Deal effectively and diplomatically with administrators, officials, and other individuals who transact business with the Executive Officer.
- Take and transcribe dictation accurately.
- Possess relevant office/computer skills to use a variety of equipment such as computers, copy machines and software programs (i.e. Microsoft Office).
- Read, understand, follow, and explain policy and procedure.
- Compile and summarize statistical, financial, and other data.
- Compose routine correspondence and reports.
- Make arithmetic calculations.
- Maintain confidentiality.

Education/Experience:

- Education which clearly demonstrates possession of the knowledge and skills listed above.
- At least three years of relevant experience, two years of which must have been at a comparable level to the administrative assistant position as determined by the Executive Officer.

Administratively Amended and Approved: June 1, 2020

LOCAL AGENCY FORMATION COMMISSION
SAN DIEGO COUNTY

POSITION SPECIFICATION

ADMINISTRATIVE ASSISTANT
(General Administrative Support)

Definition
With limited direction, to perform a wide variety of administrative and support staff level work.

Typical Tasks
Organizes and directs publication and distribution of Commission agenda and supporting materials; types, edits, formats and proofreads staff reports; prepares Commission resolutions for review and signature; prepares environmental documents and is responsible for their noticing and posting according to the California Environmental Quality Act.

Prepares and compares data and reports for accuracy and completeness while identifying typographical errors and correcting spelling, grammar, punctuation, capitalization and word usage; creates forms on computerized system; assists in the preparation of information bulletins or procedural manuals.

Other tasks include: performing general support staff duties; screening and routing incoming correspondence; typing correspondence and reports; answering telephone and taking messages; maintaining files; retrieving and gathering information to assist staff members; meeting the public to answer inquiries or complaints regarding procedures; supervising subordinate support staff, such as the Records Clerk.

Distinguishing Characteristics
The duties of this class involve proposal processing, administrative analysis, and assistance in the preparation of staff reports. As Administrative Assistant, this position is responsible for the efficient operation of support and administrative services for the staff, requiring independent judgment to comply with appropriate laws, regulations, and proceedings.

Minimum Qualifications

General Knowledge of:
- Basic research methods and available resources.
- Basic mathematics and statistics to compute data upon which various budget and administrative projections and decisions are based.

- Government organization, procedures, and operations and how they interrelate with office procedures and goals.
- Modern clerical, office, and record keeping procedures.
- Standard office equipment uses and features.

Skills:

- Good English language reading, writing, and speaking skills in order to correctly interpret and convey comprehensive and comprehendible instructions, reports, regulations, etc.
- Locate and utilize resource materials in an optimal manner so as to provide the full range of available options to decision makers and to accurately analyze situations.
- Work in cooperative relationships with other staff and the general public.
- Analyze and draw logical conclusions from data.
- Identify problem areas and recommend solutions.
- Work proficiently with office computers and operate office equipment including photocopiers, collators, binders, calculators, typewriters, word processors, computer terminals, microfilm recorders, and transcribing machines.

Education/Experience:

- 60 semester units of college study; (one year is equivalent to 30 semester units).

OR

- At least two years of full-time work experience which demonstrates the application of the knowledge and skills listed above.

Special Requirement:

Certificate:

- An original unaltered typing certificate (no photocopies) for at least 50 net WPM with a maximum of 5 errors. The typing test must be for at least five minutes with 10 gross words penalty for each error (in accordance with International Typing Contest Rules), and the certificate must be no more than 2 years old. The certificate must state the gross words per minute attained and the number of errors.

Proficiency:

- Knowledge of Word, Excel, Access, PowerPoint, or other similar computer programs.

SAN DIEGO COUNTY

POSITION SPECIFICATION

ADMINISTRATIVE ASSISTANT
(Governmental Services Support)

Definition

With limited direction, to perform a wide variety of administrative and support staff level work associated with the implementation and update of LAFCO functions.

Typical Tasks

Assists with establishment, coordination, development, implementation, and update of LAFCO functions. Prepares Commission resolutions for review and signature; prepares environmental documents and is responsible for their noticing and posting according to the California Environmental Quality Act.

Prepares and compares data and reports for accuracy and completeness while identifying typographical errors and correcting spelling, grammar, punctuation, capitalization and word usage; creates forms on computerized system; assists in the preparation of information bulletins or procedural manuals.

Other tasks include: Screening, routing, and responding to incoming inquiries; maintaining files; retrieving and gathering information to assist staff members; meeting the public to answer inquiries or complaints regarding procedures; supervising subordinate support staff.

Distinguishing Characteristics

The duties of this class involve proposal processing, administrative analysis, and assistance in the preparation of staff reports. As Administrative Assistant, this position is responsible for the efficient operation of support and administrative services for the staff, requiring independent judgment to comply with appropriate laws, regulations, and proceedings.

Minimum Qualifications

General Knowledge of:

- Basic research methods and available resources.
- Basic mathematics and statistics to compute data upon which various budget and administrative projections and decisions are based.
- Government organization, procedures, and operations and how they interrelate with office procedures and goals.
- Modern office and record keeping procedures.

- Standard office equipment uses and features.

Skills:

- Good English language reading, writing, and speaking skills in order to correctly interpret and convey comprehensive and comprehendible instructions, reports, regulations, etc.
- Locate and utilize resource materials in an optimal manner so as to provide the full range of available options to decision makers and to accurately analyze situations.
- Work in cooperative relationships with other staff and the general public.
- Analyze and draw logical conclusions from data.
- Identify problem areas and recommend solutions.
- Work proficiently with office computers and operate office equipment.
- Establish and adhere to deadlines and priorities for time-sensitive tasks.

Education/Experience:

- 60 semester units of college study; (one year is equivalent to 30 semester units). Graduation from an accredited four-year college or university with a Bachelor's Degree in public administration, political science, economics, urban studies, or a related field is highly encouraged.

OR

- At least two years of full-time work experience which demonstrates the application of the knowledge and skills listed above.

Proficiency:

- Knowledge of Word, Excel, Access, PowerPoint, or other similar computer programs.

LOCAL AGENCY FORMATION COMMISSION
SAN DIEGO COUNTY

POSITION SPECIFICATION

ADMINISTRATIVE AIDE

Definition

Under general supervision to perform a variety of administrative tasks and work of average difficulty while providing assistance and support to the analysts and the executive officer.

Typical Tasks

Performs word processing tasks on a computer system; opens proposals, creates forms, and establishes initial files and computerized mailing lists; sends out referrals and certificates as required by state law; answers telephone and takes messages; maintains files; retrieves and gathers information to assist staff members; meets the public to answer inquiries or complaints regarding procedures; screens and routes incoming correspondence.

Assists in the publication and distribution of the Commission agenda and associated supporting materials by editing, formatting, and proofreading staff reports; prepares Commission resolutions for review and signature.

Prepares and compares data and reports for accuracy and completeness while identifying typographical errors and correcting spelling, grammar, punctuation, and word usage; creates forms on computerized system; assists in the preparation of informational bulletins or procedural manuals.

Distinguishing Characteristics

The duties of this class involve processing proposals, generating forms, preparing resolutions, and assisting in the preparation of reports and correspondence. This position is responsible for the efficient operation of clerical and administrative services for the analysts and executive officer, requiring independent judgment to comply with appropriate laws, regulations, and policies. Duties also may involve public relations requiring discretion and judgment, including the interpretation and explanation of laws, procedures, and policies.

Minimum Qualifications

General Knowledge of:

- Basic research methods and available resources.
- Government organization, procedures and operations and how they interrelate with office procedures and goals.

- Modern clerical, office and record-keeping procedures.
- Standard office equipment uses and features, including computer systems.

Skills and Abilities:

- Input and retrieve data and information using a computerized system.
- Proficiency in a variety of computer programs with an interest in expanding knowledge and skills to include additional software, such as computer aided design, mapping, graphics, etc.
- Effective oral and written communication skills in order to correctly interpret and convey instructions, write reports, and comply with regulations, etc.
- Locate and utilize resource materials in order to provide the full range of available, accurate information to other staff members.
- Work in cooperative relationships with other staff members and the general public.
- Operate office equipment including a computer system, photocopier, typewriter, FAX machine, etc.

Education/Experience:

Education: 60 semester units of college study; (one year is equivalent to 30 semester units)

OR

Experience: At least two years of full-time work experience which demonstrates the application of the knowledge and skills listed above.

Special Requirement:

Certificate: A typing certificate or proof of proficiency in a computerized word processing program for at least 50 net WPM with a maximum of 5 errors. The test must have been for at least five minutes with 10 gross words penalty for each error (in accordance with International Typing Contest Rules), and the certificate must be no more than 2 years old. The certificate must state the gross words per minute attained and the number of errors.

Approved March 1, 1999
Comprehensively Updated and re-adopted March 3, 2008

LOCAL AGENCY FORMATION COMMISSION
SAN DIEGO COUNTY

POSITION SPECIFICATION

RECORDS CLERK

Definition

Under general supervision to perform a variety of clerical and/or typing tasks of average difficulty; and to perform related work.

Typical Tasks

Performs general clerical duties; screens and routes incoming correspondence; types correspondence and reports; answers telephone and takes messages; maintains files; retrieves and gathers information to assist staff members; meets the public to answer inquiries or complaints regarding procedures.

Opens proposals and establishes files; sends out referrals and certificates as required by state law; types and proofreads legal documents and descriptions; performs simple record-keeping and statistical compilation.

Performs word-processing tasks on computer; creates forms and handles special projects.

Distinguishing Characteristics

The duties of this class may involve public relations requiring discretion and judgment, including the interpretation and explanation of laws and policies. The work of this class follows general, rather than specific, policies and procedures.

Minimum Qualifications

Knowledge of:

- Alphabetic, numeric, subject and chronological indexing and filing rules and systems.
- Standard layouts and formats used by typists.
- Rules related to correct use of English (oral and written).
- Arithmetic and business math.
- Modern clerical, office and record keeping procedures.
- Standard office equipment uses and features.
- Word, Excel, Access, PowerPoint, or other similar computer programs.

Skills to:

- Input and retrieve data and information stored in a computerized record system.
- Sort and classify data and information.
- Compile, check and verify data and information for accuracy and completeness.
- Update and maintain records, logs, rosters and registers.
- Distinguish the importance of tasks and complete work in proper sequence.
- Sort and route incoming/outgoing mail.
- Read, understand, follow and explain to others instructions, directives, policy and procedures.
- Receive and assist callers, obtain and transmit information, handle complaints.
- Proofread information for conformance with standard typing layouts, to identify typographical errors, and to correct spelling, grammar, punctuation, capitalization and word usage.
- Operate office equipment including photocopiers, collators, binders, calculators, typewriters, word processors, computer terminals, microfilm recorders and transcribing machines.

Education/Experience:

- Education, training and/or experience which demonstrates possession of the knowledge and skills stated above. Examples of such education/experience are: recent completion of a clerical/secretarial curriculum from a community college or at least 12 months of recent full-time clerical experience performing duties similar to those stated above.

Special Requirement:

Certificate:

- An original unaltered typing certificate (no photocopies) for at least 50 net WPM with a maximum of 5 errors. The typing test must be for at least five minutes with 10 gross words penalty for each error (in accordance with International Typing Contest Rules), and the certificate must be no more than 2 years old. The certificate must state the gross words per minute attained and the number of errors.

LOCAL AGENCY FORMATION COMMISSION
SAN DIEGO COUNTY

POSITION SPECIFICATION

GEOGRAPHIC INFORMATION SYSTEMS (GIS) ANALYST

Definition

Under general supervision of the Executive Officer the incumbent serves at-will and is expected to perform geographic information system (GIS) work of greater than average difficulty and complexity in the preparation, maintenance, and amendment of a variety of digital maps and to perform other related information technology (IT) work as required.

Typical Tasks

Assigned GIS tasks comprise the majority of work responsibilities and include developing and maintaining databases, reports, and digital mapping. Specific tasks include – but not limited to – creating, organizing, and retrieving GIS data for reporting, analysis, and presentation purposes. Assigned IT tasks include working with the County of San Diego to manage all computers, networks, and related equipment and products. This also includes – but not limited to – coordinating with the County to gain and setup hardware/software/data access for staff and assist with new hardware/software installation and training. Assisting with website updates also applies and includes posting agendas, notices, and reports.

Essential Functions

1. Conducts analysis with GIS software and specified programming language(s).

2. Provides GIS technical services and expertise to LAFCO.

3. Provides production quality maps, data, and services for customers and presentations.

4. Conducts fieldwork to map, survey, and record spatial data with a mobile GIS data logging unit as needed.

5. Assists in the construction of scientific/statistical experiments and analytical computer models to support decision-making.

6. Assists in the preparation of reports detailing the results of these experiments or model outputs

7. Coordinates with the County to gain and setup hardware/software/data access

for staff and assist with new hardware/software installation and training.

8. Maintains website and manages content.

Qualifications

Thorough Knowledge of:

- Terminology, symbols, and principles used in developing maps.
- GIS software ESRI ArcGIS Desktop.
- GIS computer equipment, printers, plotters, etc.
- Property legal descriptions, deeds and survey data to prepare search, establish and maintain the accuracy of a variety of maps indicating ownership boundaries and/or construction boundaries; Assessor Parcel Map system, Tax Rate Areas.
- Microsoft Windows and Office software

General Knowledge of:

- Principles of surveying, reproducible graphics, record keeping, GIS and computer systems, data management.
- Media, materials, and techniques of graphic arts.
- Computer hardware, software, systems, networks, printers, and scanners.
- Digital archiving methods and best practices.
- Website design and maintenance.

Skills to:

- Work with a minimum of supervision.
- Detail-oriented and effectively multi-task with deadlines.
- Collaborate and/or coordinate with outside vendors and contractors.

Education/Experience:
Education, training, and/or experience which would clearly demonstrate the possession of the knowledge and skills stated above. Specific requirements follow:

- Undergraduate degree from an accredited college or university in GIS or related field; OR

- Three (3) years of progressively responsible paid GIS experience administering and operating GIS applications using ArcGIS Desktop or Server or similar type software to develop GIS data, digital maps, or other digital displays for spatial analysis.

Licenses or Requirements:

- A valid California driver's license may be required by time of appointment.

Working Conditions

Office environment; exposure to computer screens.

Essential Physical Characteristics

The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of this position. Reasonable accommodations may be made to enable an individual with a qualified disability to perform the essential functions of a job, on a case-by-case basis.

Continuous: upward and downward flexion of the neck. Frequent: sitting, repetitive use of hands to operate computers, printers and copiers. Occasional: walking, standing, bending and twisting of neck, bending and twisting of waist, squatting, simple grasping, reaching above and below shoulder level, and lifting and carrying of items weighing up to 40 pounds.

Background Investigation

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, and severity. Prior to appointment, candidates will be subject to a standard background investigation.

Probationary Period

Incumbents appointed to permanent positions in this classification shall serve a probationary period of 12 months.

Established April 4, 1994
Amended April 3, 1995
Comprehensively Updated and re-adopted March 3, 2008
Amended August 6, 2018

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LOCAL AGENCY FORMATION COMMISSION
SAN DIEGO COUNTY

POSITION SPECIFICATION

COMMUNICATIONS ASSOCIATE

Definition

The Communications Associate is an entry level professional class position responsible for performing a wide range of technical and administrative duties in support of the Commission's public information and outreach activities. The incumbent plans, organizes and coordinates communication activities and promotes Commission initiatives, meetings, and special events; evaluates effective civic engagement strategies for Commission programs and policies.

Typical Tasks

The Communications Associate has responsibility, under the direction of the Executive Officer or Assistant Executive Officer, for supporting the Commission's public information and engagement activities including assisting in the development, coordination and implementation of public outreach strategies, performing specialized duties in developing promotional materials, managing website and social media sites, and development of print collateral and strategic messaging. Incumbent will also be responsible for assisting in preparing, filing, and/or recording official documents; helps to transmit and post public notices and other official announcements; assists in agenda distributions; prepares, edits, and proofreads staff reports; and performs related duties as assigned. The Communications Associate is expected to be self-directed and complete technical and administrative work in support of the Commission.

Knowledge, Skills, and Abilities

The examples of knowledge, skills, and abilities listed in this class specification are representative but not necessarily exhaustive. Management is not precluded from assigning other related functions not listed herein if such functions are a logical assignment for the position.

Knowledge of:

- Public relations and engagement principles, practices, tools and techniques;
- Business and creative writing methods for presentations, letters, newsletters, brochures, social media, and website text;
- Graphic design, photography, and visual presentation techniques, and tools;
- A variety of electronic, social media, and desktop office computer software;

- Standard English language usage, spelling, grammar, punctuation and vocabulary;
- Recent developments, current literature and sources of information related to marketing, communications, media relations, and graphics;
- Pertinent Federal, State and local laws, codes and regulations including LAFCO statute and local rules and policies.

Ability to:

- Identify, plan, organize, and prioritize outreach and communication needs in a diverse municipal government setting;
- Collect, evaluate, analyze relevant information;
- Make recommendations and implement appropriate course of action;
- Learn and adapt to new technologies and stay informed;
- Operate and use modern office equipment including computers, web-based programs and software applications;
- Establish and maintain filing, record keeping and tracking systems;
- Work under steady pressure with frequent interruptions and a high degree of public contact by phone, email, or in person;
- Work independently in the absence of supervision;
- Understand and effectively follow oral and written instructions;
- Communicate both orally and in writing in a clear, concise and positive manner;
- Establish and maintain effective working relationships;
- Perform a range of technical, programmatic, and administrative duties.

Distinguishing Characteristics and Tasks:

- Develop website content, print collateral and social media messaging;
- Perform timely updates to the website and social media accounts;
- Assist in the development and monitoring of strategies and goals for targeted public outreach and to enhance and encourage public engagement;
- Utilize multi-media multi-level web-based programs, social media platforms, and software applications to accomplish outreach plans;
- Promote and execute advertising, public relations and outreach plans;
- Produce, coordinate, and share publications, videos, web content, presentations, and other informational materials;
- Assist with drafting, reviewing, proofreading, and/or posting official notices, public announcements, meeting materials or other informational materials;
- Post notices on social media, website, and physical locations (as appropriate);
- Meet with staff to determine key messages and themes;
- Attend and participate in public and professional group meetings and record notes;
- Coordinate translation services for staff and members of the public;

- Serve as liaison between the public and LAFCO staff on a day to day as well as on community outreach strategies and in communicating key messaging;
- Engage with public members and agency or community group leaders via email, phone, in person and via social media on behalf of the Commission;
- Serve as the initial point of contact in office for incoming persons and phone calls;
- Stay abreast of new trends and innovations in the field of marketing, communications, graphics, design software and public information methods.

Qualifications

Education, training, and/or experience that demonstrates possession of the knowledge, skills, and abilities listed above. A typical way to obtain the qualifying education and experience follows:

Education/Training:

A bachelor's degree from an accredited college or university with major course work in Marketing, Communications, Journalism, or a closely related field is preferred. Graduation from an accredited community college with a related associate degree and additional years of relevant experience may substitute for a bachelor's degree.

Experience:

At least one year of relevant technical and administrative support experience in program outreach, organizational communications, community relations or related field. Customer service experience is preferred.

Special Knowledge and Skills Required:

Comprehension of government organization, procedures, and operations and how they interrelate with office procedures and goals; proficiency with Word, Excel, Access, or other similar computer programs; ability to perform detail-oriented work; ability to balance multiple assignments and deliverables while adhering to deadlines and priorities for time-sensitive tasks; knowledge of various social media/website platforms (e.g., LinkedIn, Instagram, YouTube, Twitter/X, etc.) and management tools, uses, and content creation.

Licenses and Certificates

All licenses and certificates must be maintained as a condition of employment.

- A valid appropriate California driver's license may be required.
- Maintain a satisfactory driving record.

Special Requirements

Essential duties require the following physical skills, abilities, and work environment:

Physical Skills: Able to use standard office equipment, including a computer and other electronic equipment; arm, hand, finger, wrist, leg, or foot motion repetitively; firmly or lightly grasp items as needed; sit for extended periods; stand, walk, kneel, and maintain sustained posture in a seated or standing position for prolonged periods of time; vision to read printed materials, a computer screen, and to work in a typical office environment; hearing and speech to communicate in person, over the telephone, and to make public presentations; lift and carry 30 pound boxes, files, and materials.

Ability to: Travel to different sites and locations; drive safely to different sites and locations; work protracted and irregular or unusual hours for meeting attendance (including evening meetings) or participation in specific projects or programs.

Work Environment: Mobility to work in a typical office setting.

Class specifications are only intended to present a descriptive summary of the range of duties and responsibilities associated with specified positions. Therefore, specifications may not include all duties performed by individuals within a classification. In addition, specifications are intended to outline the minimum qualifications necessary for entry into the class and do not necessarily convey the final qualifications of incumbents within the position.

Pursuant to California Government Code Section 3100, all public employees are required to serve as disaster service workers subject to such disaster service activities as may be assigned to them by their supervisor or by law.

Background Investigation
Prior to appointment, candidates will be subject to a background investigation.

Approved:	June 3, 2024
Revision Dates:	
Former Titles:	
Status:	Non-Exempt/Administrative
ADA Review:	
DOT:	No
Physical:	No

APPENDIX B

EXECUTIVE OFFICER COMPENSATION PLAN

This Executive Officer Compensation Plan establishes the compensation for the Executive Officer, an Executive Management position. The plan provides for initial placement and subsequent adjustment of salary within the salary schedule fixed by the Commission. Any adjustment in rate of compensation pursuant to this plan shall be administered by the Commission.

1. **Structure**

   a. The minimum, midpoint, and maximum rate of the designated range are set forth in the salary schedule. The salary band range for the Executive Officer classification will be aligned with and automatically adjusted from time to time with the same salary range as comparable classifications in the County (i.e., planning director, public works director, registrar of voters, etc.).

   b. The midpoint rate of the designated range represents the job value of a fully competent employee and is the benchmark used to compare the class to other classes, internally and externally. The midpoint rate may be changed periodically by the Commission to reflect changes in internal and/or external factors. Any such change to the midpoint shall not automatically effect a change in the then current rate of the Executive Officer.

   c. The relationship between the minimum and maximum rates of the designated range shall approximate a differential of 50%.

   d. The range does not have steps. The Executive Officer may be paid an amount equal to or between the minimum and maximum rate of the designated range, according to the provisions of this plan.

   e. The structure of the range shall be reviewed periodically and may be changed by the Commission. The structure will be automatically adjusted based on salary band changes authorized by the County to its employees in comparable positions.

2. **Appointment**

   The Executive Officer is appointed by the Commission and serves at the pleasure of the Commission. A person initially appointed as Executive Officer shall receive a salary determined by the Commission.

3. **Adjustment Within Range up to Midpoint**

   For an employee whose salary is below midpoint of the designated range, adjustments up to the midpoint shall be governed by this subsection (3). No provision in this subsection (3) shall be construed to provide a guarantee of adjustment at any time during the employee's term of employment.

   a. Effective the first day of any pay period after each anniversary date of the employee's appointment as Executive Officer, the employee may receive a salary adjustment of 5% of current salary, not to exceed midpoint. Any adjustment shall be approved by the Commission and based upon the determination by the Executive Officer Compensation Committee that the employee's overall performance is rated at the level of "meritorious" or higher.

   b. No provision contained in this subsection (3) shall be construed to limit or deny the Commission's discretion to postpone an adjustment or reduce the compensation of an employee as a result of the employee's performance, as recommended by the Executive Officer Compensation Committee. However, any subsequent salary adjustment prior to the employee's next annual anniversary date must be based upon a mid-cycle Performance Evaluation. If such adjustment is an increase, the new salary rate shall not exceed that which the employee would have been eligible to receive on or after the immediately preceding anniversary date, pursuant to this subsection (3).

   c. Notwithstanding subdivisions (a) and (b) of subsection (3) above, the Commission may approve an adjustment of the Executive Officer's salary rate upon recommendation of the Executive Officer Compensation Committee.

4. **Adjustment Within Range Above Midpoint**

   The Commission may adjust the Executive Officer's salary rate above midpoint if the employee's overall performance is rated at the level of "outstanding" by the Executive Officer Compensation Committee. This rating alone does not entitle the employee to a pay adjustment.

5. **Exemplary Performance Compensation Adjustment**

   a. Eligibility and Maximum. An Executive Officer may receive an exemplary performance compensation adjustment (e.g., cash award and/or bonus) in increments of one percent (1%) not to exceed a total of (10%) of the employee's approximate annual salary at the time of approval of the adjustment.

b. Approval. Adjustments shall be based upon the recommendation of the Executive Officer Compensation Committee following a performance evaluation, subject to the availability of funds within the budget.

c. Term of Adjustment. An Executive Officer shall be limited to one exemplary compensation adjustment in a calendar year and shall be paid either in a lump sum or in incremental payments during the year.

d. Compensation Unfixed. Payment of compensation adjustments shall not affect the Executive Officer's rate of compensation. Commencing the first day of the first full pay period of each calendar year, compensation of the Executive Officer shall be unfixed and indefinite for the year until such time as the Commission determines whether to authorize an exemplary performance compensation adjustment. That determination is to be based upon an evaluation of the employee's performance by the Executive Officer Compensation Committee.

6. **Executive Officer Compensation Committee**

Wherever this plan refers to the Executive Officer Compensation Committee, the following shall apply:

a. The Executive Officer Compensation Committee shall consist of three members of the Personnel Committee as provided under Rule No. 1.11 with the option of the Chair to add a fourth member at his or her discretion.

b. The Executive Officer Compensation Committee shall periodically review and rate the performance of the Executive Officer and make recommendations to the full Commission for any adjustments to the Executive Officer's compensation.

7. **Relocation Allowance**

Upon determination by the Commission that relocation allowance is appropriate to facilitate recruitment for and appointment of an Executive Officer, a relocation allowance in an amount not to exceed $12,000.00 may be authorized for the actual and reasonable relocation expenses incurred incidental to relocation of the appointee and his/her immediate family to San Diego County. Expenses may include, but are not limited to, personal transportation, moving expenses for household goods and temporary housing arrangements. Claims for expenses submitted pursuant to this provision shall be subject to review and determination by the Chairperson prior to reimbursement. Reimbursement for relocation expenses shall be subject to review of the full Commission.

8. **Severance Pay**

   If an Executive Officer is terminated by the Commission, s/he may be eligible to receive up to six (6) months of their then annual salary upon approval of the Commission; provided, however, that no severance pay may be paid if termination is for reasons of malfeasance or misfeasance in office or conviction of a crime involving moral turpitude.

APPENDIX C

TELECOMMUTING POLICY

Telecommuting is an arrangement that allows eligible LAFCO employees to work in a designated area outside the office. Telecommuting is a cooperative arrangement between employees and LAFCO. Telecommuting benefits employees, LAFCO, and the community, and as such is encouraged by the Commission to the extent applicable with these provisions. Benefits include:

- Ability to function during an emergency when the regular worksite is inaccessible.
- Increased productivity.
- Efficient use of LAFCO resources, including office space.
- Recruitment and retention of highly qualified employees.
- Greater flexibility for employees.
- Improved employee morale and job satisfaction.
- Reduced employee absenteeism.
- Reduced employee commute time and costs.
- Decreased energy consumption, pollution, traffic, and related congestion.

1. **Policy Guidelines**

   a. Telecommuting is a privilege, not a right. All LAFCO employees who telecommute must have an approved telecommuting agreement under this policy. In his/her discretion, the Executive Officer may have additional telecommuting requirements, guidelines, or procedures, provided they are consistent with the intent of this program.

   b. Telecommuting does not change the duties, obligations, responsibilities, or terms and conditions of LAFCO employment. Telecommuting employees must comply with all LAFCO rules, policies, practices, and instructions.

   c. A telecommuting employee must perform work during scheduled telecommuting hours. Employees may not engage in activities while telecommuting that would not be permitted at the regular worksite, such as child, elder, or other dependent care. Telecommuting employees may take care of personal business during unpaid lunch periods, as they would at the regular worksite.

d. Employees must read the telecommuting policy, and any guidelines issued by the Executive Officer, obtain the Executive Officer's approval, and execute the telecommuting agreement before telecommuting.

e. The Executive Officer may deny, modify, or terminate a telecommuting agreement for any business reason that is not arbitrary or capricious. Similarly, a telecommuting employee may end or request to change a telecommuting agreement at any time.

f. Telecommuting is intended to be cost neutral. LAFCO is not required to provide telecommuting employees with materials or supplies needed to establish an alternate worksite (desk, chair, computer, software, cell phone, etc.), and assumes no responsibility for set-up or operating costs at an alternate worksite.

g. The Executive Officer has the sole discretion to provide equipment, software, or supplies, or allow employees to use their personal equipment while telecommuting. The Executive Officer has the sole discretion to reimburse employees for the costs of using personal equipment while telecommuting. Any provision to reimburse costs should be addressed expressly in the telecommuting agreement.

h. All LAFCO rules regarding the use of computers, network, and the internet apply while an employee is telecommuting, regardless of whether the employee is using LAFCO-provided or personal equipment.

i. Telecommuting is distinguished between "regular" and "situational." Regular telecommuting involves an employee continually working specific days/times from an offsite location. Situational telecommuting involves an employee working specific days/times from an offsite location with defined start and ending periods and typically in response to temporary issues (daycare, schooling, transportation, etc.).

2. **Eligibility**

a. Eligibility for telecommuting is based on both the position and the employee. Not every job, or every employee, is well suited for telecommuting.

b. All professional positions as defined in Rule No. 6 are eligible for regular or situational telecommuting privileges.

c. All support positions as defined in Rule No. 6 are eligible for situational telecommuting privileges.

d. The determination of whether eligible employees are authorized for regular or situational telecommuting is at the sole discretion of the Executive Officer.

e. Only employees with the most recent satisfactory or above job performance evaluations are eligible to telecommute.

f. Notwithstanding eligibility under normal conditions, all employees shall automatically telecommute for the duration of any declared emergency by the County Health Officer unless otherwise required by the Executive Officer.

3. **Agreement Options**

a. Telecommuting agreements can be authorized by the Executive Officer on a regular or situational basis as defined in this policy.

b. Telecommuting agreements – regular or situational – shall follow the form approved by Commission Counsel and signed by both the employee and Executive Officer.

c. All signed telecommuting agreements shall be filed with employees' personal records.

4. **Work Hours**

a. Under normal conditions, the percent of telecommuting hours for any authorized employee should not exceed 50% of their total work hours during the fiscal year.

b. All the rules applicable at the regular worksite are applicable while telecommuting. This includes all of the following standards:

- Telecommuting employees must perform their designated duties and tasks during scheduled work hours.
- Employees must account for and report time spent telecommuting the same way they would at the regular worksite, or according to the terms of the agreement.
- Time accounting should be included in the telecommuting agreement.

- Employees may work overtime only when directed to do so and approved in advance by the Executive Officer or Assistant Executive Officer.
- Employees must obtain approval to use vacation, sick, or other leave in the same manner as departmental employees who do not telecommute.
- Telecommuting employees who become ill must accurately report hours worked and use sick leave for hours not worked.

5. **Offsite Work Area**

a. A telecommuting employee must designate a work area suitable for performing official business. The employee must perform work in the designated area when telecommuting. Telecommuting employees must work in an environment that allows them to perform their duties safely and efficiently.

b. Employees are responsible for ensuring their work areas comply with the health and safety requirements covered in the telecommute agreement. LAFCO may request photographs of the employee's designated work area to determine compliance with health and safety rules.

c. Employees are covered by workers' compensation laws when performing work duties at their designated alternate locations during regular work hours. Employees who suffer a work-related injury or illness while telecommuting must notify the Executive Officer or Assistant Executive Officer and complete any required forms immediately.

d. LAFCO is not liable for damages to an employee's personal or real property while the employee is working at an alternate worksite.

6. **Equipment and Supplies**

a. A telecommuting employee must identify the equipment, software, supplies, and support required to successfully work at an offsite location and must specify those items in the telecommute agreement. If LAFCO does not provide the needed equipment, software, supplies, or support, and the employee does not have them, the employee will not be eligible to telecommute.

b. Equipment, software, or supplies provided by LAFCO are for LAFCO business only. A telecommuting employee does not obtain any rights to LAFCO equipment, software, or supplies provided in connection with telecommuting. The employee must immediately return all LAFCO

equipment, software, and supplies at the conclusion of the telecommuting arrangement or at the Executive Officer's request.

c. A telecommuting employee must protect LAFCO equipment, software, and supplies from possible theft, loss, and damage. The telecommuting employee may be liable for replacement or repair of the equipment, software, or supplies in compliance with applicable laws on negligence or intentional conduct in the event of theft, loss, or damage.

d. Any equipment, software, files, and databases provided by LAFCO shall remain the property of LAFCO. A telecommuting employee must adhere to all software copyright laws and may not make unauthorized copies of any LAFCO-owned software.

e. Employees may not add hardware or software to LAFCO equipment without prior written approval.

f. Employees who use their personal equipment for telecommuting are responsible for the installation, repair, and maintenance of the equipment. Telecommuting employees must understand and agree that LAFCO is entitled to, and may access, any personal equipment used while telecommuting, such as a personal computer, telephone, fax machine, monthly bills, and internet records. Employees must contact the Executive Officer or Assistant Executive Officer if equipment, connectivity, or other supply problems prevent them from working while telecommuting.

7. **Security of Confidential Information**

a. All files, records, papers, or other materials created while telecommuting are LAFCO property. Telecommuting employees shall identify any confidential, private, or personal information and records to be accessed and ensure appropriate safeguards are used to protect them.

b. LAFCO may require employees to work in private locations when handling confidential or sensitive material. Employees may not disclose confidential or private files, records, materials, or information, and may not allow access to LAFCO networks or databases to anyone who is not authorized to have access.

8. **Sunshine Laws**

   a. The California Public Records Act regarding public information and public records applies to telecommuting employees. Public records include any writing containing information relating to the conduct of the public's business prepared, owned, used, or retained by LAFCO regardless of physical form or characteristic. Public information means the contents of a public record.

   b. Upon receipt of an appropriate request, and subject to authorized exemptions, a telecommuting employee must permit inspection and examination of any public record or public information in the employee's custody, or any segregable portion of a public record, within required time limits. This requirement exists regardless of where the public record is located.

9. **Procedures**

   Employees must complete the following steps before telecommuting:

   - Talk with the Executive Officer to determine eligibility.
   - Complete the telecommute agreement as required by the Executive Officer.
   - Receive approval of the telecommute agreement by the Executive Officer.

10. **Denial, Modification, or Termination**

   (a) Denial, modification, or termination of a telecommuting agreement is not subject to the grievance procedures in any Memorandum of Understanding, or to any other review or appeal procedures, except as noted in this section.

   (b) An employee who believes their telecommute agreement has been denied, or whose previously approved agreement has been modified or terminated, for arbitrary or capricious reasons may appeal the decision to LAFCO's Personnel Committee or its designee. The decision of LAFCO's Personnel Committee or its designee is final.

Appendix C | Attachment 1

LAFCO Telecommuting Program Application and Agreement

Note: *The first three sections are for employees; Section four is for the supervisor/Executive Officer.*

I. Employee Information

Name (First/Last): _____

Job Title: _____

II. Telecommute Information

This application/agreement is for (select one):

☐ Regular telecommuting ☐ Situational telecommuting

If approved, this application/agreement will be effective beginning _____ .

The Executive Officer will review and evaluate this agreement at their discretion to determine whether to continue, modify, or terminate it.

Proposed Telecommuting Schedule

Please list the two days you are requesting telecommuting (e.g., Monday and Tuesday). Days not listed will be expected in-office workdays.

Scheduled Work Hours: _____

Designated Work Location: _____

Additional Details for Consideration:

Communication Methods:

Phone Number: _____ Email Address: _____

Other: _____

☐ I plan to check-in with my supervisor _____ times per day by _____.

III. EMPLOYEE ACKNOWLEDGEMENTS

☐ I have read and will abide by:

- The Telecommuting Program Policy
- The Telecommuting Technical Guidelines, if issued.

☐ I understand and agree that telecommuting is a privilege, not a right, and is not subject to the grievance process. The Executive Officer may unilaterally terminate my telecommuting privileges at any time should he/she determine it is best for LAFCO.

☐ I understand and agree that I am responsible for maintaining the safety and security of LAFCO equipment, supplies, and information while telecommuting.

☐ I understand and agree that I must comply with all procedures designed to protect sensitive LAFCO information, including information that is confidential, private, personal, or otherwise sensitive while telecommuting.

☐ I understand and agree that telecommuting is not a substitute for dependent care.

☐ I acknowledge that my designated workspace complies with all health and safety requirements.

☐ I agree to accurately record and submit the hours I work while telecommuting.

☐ I understand and agree that I must come into the office on a regularly scheduled telecommute day when my supervisor requires me to do so.

☐ I understand and agree that LAFCO is not required to provide me with any equipment or supplies I may need while telecommuting.

☐ I have discussed this application and agreement with my supervisor. I agree to comply with all terms and conditions in this telecommute application and agreement. I understand that my telecommuting agreement can be ended or modified for a business reason at any time.

☐ I have read and will comply with all LAFCO rules while telecommuting.

Date: _____ **Signature:** _____

Print Full Name: _____

IV. EXECUTIVE OFFICER REVIEW AND APPROVAL

I have reviewed and ***approved*** **this telecommute agreement**.

Date: _____ **Signature:** _____

Print Full Name: _____

I have reviewed and ***approved*** **this telecommute agreement <u>with the following revisions</u>**:

Date: _____ **Signature:** _____

Print Full Name: _____

I have reviewed and ***<u>deny</u>*** **this telecommute agreement after the following considerations**:

☐ Job Performance

☐ Employee Position

☐ Other: _____

Date: _____ **Signature:** _____

Print Full Name: _____

SAN DIEGO COUNTY
LOCAL AGENCY FORMATION COMMISSION

ARTICLE VII
CONFLICT OF INTEREST CODE

On September 14, 1992, pursuant to the provisions of Government Code Section 87306, the San Diego Local Agency Formation Commission (LAFCO) amended its Conflict of Interest Code adopted September 12, 1977 by substituting and incorporating by reference the terms of Fair Political Practices Commission Regulation No. 18730. Said amended Code was approved by the Board of Supervisors, as LAFCO's Code Reviewing Body, on January 5, 1993.

Copies of the Commission's amended Conflict of Interest Code and FPPC Regulation 18730 are attached hereto for reference, and identified as, respectively, Attachment 1 and Attachment 2.

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CONFLICT OF INTEREST CODE FOR THE
SAN DIEGO COUNTY LOCAL AGENCY FORMATION COMMISSION

The Political Reform Act, Government Code Section 81000 et seq., requires state and local government agencies to adopt and promulgate conflict of interests codes. The Fair Political Practices Commission has adopted a regulation, 2 Cal. Code of Regs. Section 18730, which contains the terms of a standard conflict of interest code. It can be incorporated by reference and may be amended by the Fair Political Practices Commission after public notice and hearings to conform to amendments in the Political Reform Act. Therefore, the terms of 2 Cal. Code of Regs. Section 18730 and any amendments to it duly adopted by the Fair Political Practices Commission are hereby incorporated by reference, and, along with the attached Appendix in which members and employees are designated and disclosure categories are set forth, constitute the conflict of interest code of the San Diego County Local Agency Formation Commission.

All officials and designated employees shall file statements of economic interests – also known as Form 700 – with the Commission Clerk. Should statements be received in signed paper format the Commission Clerk shall make and retain copies and forward the originals to the Clerk of the Board of Supervisors for the County of San Diego as the LAFCO filing officer. Should statements be filed using the County of San Diego's Form 700 e-filing system both the Commission Clerk and the Clerk of the Board of Supervisors will receive access to the e-filed statements simultaneously. The Commission Clerk will

make all retained statements available for public inspection and reproduction during regular business hours.

Exhibit A:

Designated Positions

Exhibit B:

Disclosure Categories

Adopted September 14, 1992
Administratively Revised and Corrected September 22, 1994
Updated July 31, 1995
Administratively Revised and Corrected March 27, 2000
Comprehensively Updated and re-adopted March 3, 2008
Administratively Revised and Corrected June 15, 2010
Amended: August 3, 2020
Amended: October 7, 2024

EXHIBIT A

DESIGNATED POSITIONS

Designated Positions	*Reportable Economic Interest Category Number
A. Officials	
Regular Members of the Commission	1, 2, 3, 4, and 5
Alternate Members of the Commission	1, 2, 3, 4 and 5
B. Management and Other Employees	
Executive Officer	1, 2, 3, 4, and 5
Assistant Executive Officer	, 3, 4, and 5
Chief, Policy Research	3, 4, and 5
Chief, Governmental Services	3, 4, and 5
Local Governmental Analyst III	4 and 5
Local Governmental Analyst II	4 and 5
Local Governmental Analyst I	4 and 5
GIS/IT Analyst	4 and 5
Commission Clerk	4 and 5
Communications Associate	4 and 5
C. General Counsel	
Commission Counsel	1, 2, 3, 4, and 5
Deputy Commission Counsel	1, 2, 3, 4, and 5

D. Consultants

Consultants shall be included in the list of designated employees and shall disclose pursuant to the broadest disclosure category in the code, subject to the following limitations:

The Executive Officer 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 Executive Officer’s determination is a public record and shall be retained for public inspection in the same manner and location as this conflict of interest code.

EXHIBIT B

DISCLOSURE CATEGORIES

Category 1

Designated officials or employees assigned to this category must report:

All investments involving stocks, bonds, and other interest where ownership is less than 10 percent. (Schedule A-1 in Form 700)

All investments, income, and assets of businesses entities and/or trusts where ownership is 10 percent or greater. (Schedule A-2 in Form 700)

Category 2

Designated officials or employees assigned to this category must report:

All interests in real estate – including rental properties – located within San Diego County and any other areas in which the Commission is exercising any of its regulatory or planning duties and powers. (Schedule B in Form 700)

Category 3

Designated officials or employees assigned to this category must report:

All income and associated businesses and business positions that include spouses or domestic partners as well as any personnel loans. (Schedule C in Form 700)

Category 4

Designated officials or employees assigned to this category must report:

All gifts received directly or through intermediaries with a fair market value of $50 or more. (Schedule D in Form 700).

Category 5

Designated officials or employees assigned to this category must report:

All travel and associated lodging and meals provided free of charge or reimbursed. (Schedule E in Form 700)

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RULES
SAN DIEGO
LOCAL AGENCY FORMATION COMMISSION

ARTICLE VIII
Administrative Procedures
Purchasing, Procurement, and Bidding

8.1 Purchasing, Procurement, and Bidding Procedures for Goods and Services
8.2 Requisitions Less than $1,000
8.3 Requisitions More than $1,000 and Less than $10,000
8.4 Requisitions of $10,000 to $124,000
8.5 Professional and Specialized Services and Special Departmental Expenditures
8.6 Travel Expenses

8.1 PURCHASING, PROCUREMENT, AND BIDDING PROCEDURES FOR GOODS AND SERVICES

LAFCO Purchasing, Procurement, and Bidding Procedure establishes the Commission's purchasing, procurement, and bidding procedures. The Commission shall procure goods and services in accordance with the following procedures *(except Independent Auditor Services, which must have commission approval at any level):*

8.2 REQUISITIONS LESS THAN $1,000

If the estimated value of the purchase of supplies, services or equipment is less than $1,000, the LAFCO purchasing clerk may:

a. Select a vendor, without bid upon receiving approval from the Executive Officer;
b. Complete the purchase transaction;
c. Process the invoice for payment; and
d. After supplies, services or equipment have been received or ordered, submit the invoice to the Executive Officer for approval.

8.3 REQUISITIONS MORE THAN $1,000 AND LESS THAN $10,000

If the estimated value of the purchase of supplies, services or equipment is more than $1,000, but less than $10,000, the LAFCO purchasing clerk shall:

a. Obtain two (2) comparative cost estimates and document the reason for the selected vendor.
b. Prepare and submit a requisition or similar document to the Executive Officer for approval.
c. The Executive Officer will either approve or deny the purchase order to the selected vendor.
d. After supplies, services or equipment have been received, or ordered through online purchasing, submit the invoice or similar document to the Executive Officer for payment.

8.4 REQUISITIONS $10,000 TO $124,999

If the estimated value of the purchase of supplies, services or equipment is $10,000 or more, but less than $125,000, the purchasing clerk shall follow procedures a-h below. If the value of the purchase is greater than $124,999, then the proposed purchase shall be subject to Commission approval:

a. Post a notice inviting bids/proposals on the Commission's website; advertise in public notice/legal section of 3 local general distribution newspapers, and direct mail to prospective contractors at least ten days before the date of opening of the bids.
b. Solicit bids/proposals by written and telephonic request to prospective vendors.
c. Require bids/proposals to be in writing.
d. Seek at least three bids/proposals.
e. Recommend the responsible vendor with the lowest bid price in conformity with the specifications and/or qualifications as appropriate.

f. Prepare and submit a requisition or similar document to the Executive Officer for review and approval.
g. The Executive Officer will issue a purchase order to the selected vendor.
h. After supplies, services or equipment have been received, submit the invoice to the Executive officer for payment.
i. Where otherwise required by this Chapter, the following procurements, contracts or transactions are exempted from the provisions of this section, at the discretion of the Executive Officer:

1. Emergency procurements for construction, equipment or repairs;
2. Goods or services that can be reasonably obtained from a single source;
3. Sufficient, satisfactory bids are not received;
4. Items required to match or be compatible with other goods, furnishings, materials or equipment previously purchased by the Commission;
5. Utility services and related charges;
6. Goods, services and/or professional services obtained from or through agreement with any governmental, public or quasi-public agency where the agency contracted for goods, services and/or services through a competitive process;
7. Real property leases or purchases and related title and escrow fees, to the extent permitted by law or Commission authorization;
8. Insurance and bonds;
9. Advertising in magazines, newspapers or other media;
10. Library collection materials or services or other books or periodicals;
11. Membership dues, conventions, training, travel arrangements including hotels, car rentals and airfare;
12. Surplus personal property owned by another government, public or quasi-public entity;
13. Situations where solicitations of bids or proposals for goods, services and/or professional services would be impractical, unavailing, impossible, or not in the best interests of the Commission.

8.5 PROFESSIONAL AND SPECIALIZED SERVICES AND SPECIAL DEPARTMENTAL EXPENDITURES

For purposes of this section, Professional Services and Specialized Services and Special Departmental Costs shall mean the procurement of services that involve the exercise of professional discretion and independent judgment based on advanced or specialized knowledge, expertise or training gained by formal study or experience. Professional and Specialized Services and Special Department Costs shall further mean those services that the Executive Officer has determined the Commission lacks staffing or has insufficient personnel with the necessary training and expertise to perform the services or to perform such services in a timely manner.

a. It is in the best interest of the public, as allowed by State Law that contracts for professional and special services be awarded based on the demonstrated competence and professional qualifications necessary for the satisfactory performance of the services required. The Executive Officer may negotiate with

qualified firms or individuals to obtain a fair and reasonable price for the services and is not required to award a contract to the lowest responsible bidder.

b. Procurement of professional or special departmental services where the total cost of services provided in a twelve month period is less than $10,000, services may be procured using a simplified and cost effective operational procedure.

c. Professional or special departmental services, where the cost of services provided in a twelve month period is more than $10,000 but less than $125,000 shall be procured as follows:

1. The purchasing clerk shall obtain the names of at least three firms or individuals that are, or have within the preceding twelve months, provided substantially similar services to public agencies. The Executive Officer may waive the requirements for solicitation of multiple proposals/bids if only one individual or firm can reasonably provide the professional services based on specific skills and knowledge pertinent to LAFCO and it is in the best interest of the Commission to waive the requirement.

2. A request for proposal shall be provided to all potential candidates outlining the scope of services required, time frame for completion, pricing structure, liability insurance information and coverage and other pertinent information. Professionals must submit their responses in the specified format no later than the stated final due date for proposals. The response must include liability insurance information and coverage.

3. The evaluation process will be based on the criteria stated in the request for proposal but will generally include the scope of services offered, the professional's capabilities and previous experience in the field.

4. After the proposals are evaluated, the Executive Officer will negotiate an agreement with the selected professional. If an agreement is not reached within a reasonable time, the Executive Officer will terminate discussion with the first candidate and open negotiations with the second choice.

5. The Commission's Counsel may waive the bid requirements of this chapter when it is necessary or convenient for the management of the Commission's affairs.

8.6 TRAVEL EXPENSES

It is a requirement of the Commission that commissioners and employees will use due diligence in determining and evaluating the need for travel in carrying out the Commission's business needs. Each incidence of travel shall be clearly justifiable, as to cost, value derived, and the number of individuals required to attend. Every effort should be made to assure that the key elements or results of any meetings, conferences, workshops, or other presentations while in a travel status are clearly communicated to those who will benefit from such events. Adoption History: Article VIII,Sections 8.1 to 8.6:*Adopted February 4, 2013*

RULES
SAN DIEGO
LOCAL AGENCY FORMATION COMMISSION

ARTICLE VIIII
Administrative Procedures
Capitalization, Depreciation, and Asset Inventory

9.1 Capitalization, Depreciation, and Asset Inventory Procedures
9.2 Capitalization of Fixed Assets
9.3 Depreciation of Fixed Assets
9.4 Inventory Control

9.1 CAPITALIZATION, DEPRECIATION, AND ASSET INVENTORY PROCEDURES

The Commission generally follows the County of San Diego's accounting procedures when making decisions regarding the capitalization and depreciation of assets. LAFCO's Capitalization, Depreciation, and Asset Inventory Procedure applies to items purchased or leased directly by the San Diego LAFCO and are subject to the following capitalization, depreciation, and inventory control procedures:

9.2 CAPITALIZATION OF FIXED ASSETS

1. All fixed assets including land, buildings, machinery and equipment, with an original cost of more than $7,500 owned by the San Diego LAFCO, will be subject to accounting and reporting (capitalization) per this LAFCO procedure. All costs associated with the purchase or construction shall be considered, including freight and transportation charges, site preparation expenditures, installation charges, professional fees, and legal costs directly attributable to asset acquisition.

2. The capitalization threshold of more than $7,500 shall be applied to individual units only. For example, ten desks purchased through a single purchase order each costing $1,000 will not qualify for capitalization even though the entire purchase totaled $10,000.

3. A repair to a fixed asset will generally not be capitalized unless the repair extends the useful life of the asset. In that case, it would represent an improvement and is subject to the capitalization procedure and should be evaluated separately.

4. An improvement that extends the useful life of a fixed asset will be capitalized only if the improvement meets the $7,500 threshold. *Note: An improvement to a fixed asset that originally had a cost below the threshold, but now exceeds $7,500 as a result of the improvement, should be combined as a single asset at the total cost (original cost plus the cost of the improvement) and capitalized.*

5. Miscellaneous other assets and goods valued less than $7,500 are not subject to the above capitalization provisions.

9.3 DEPRECIATION OF FIXED ASSETS VALUED AT MORE THAN $7,500

The straight-line method with an assumed salvage value of zero shall be used to depreciate all fixed assets valued at more than $7,500 based on the useful lives determined at the time of purchase. Depreciation will begin the month following purchase.

- Machinery & Equipment – 3 to 5 years
- Furniture & Fixtures – 5 to 7 years

9.4 Inventory Control

1. LAFCO staff shall be responsible for establishing and maintaining systems and procedures that properly safeguard all assets whether the cost of the asset is above or below $7,500. Inventory control is applied only to movable fixed assets that cost more than $7,500 (machinery, equipment, furniture, vehicles, etc.) and not to land, buildings, or

other *immovable* fixed assets. However, an annual inventory shall be conducted of all LAFCO assets valued at more than $1,000. The list will be prepared by a designated member of the LAFCO staff and will be subject to approval by the Executive Officer

2. The Executive Officer shall designate a staff member who will be responsible for monitoring the LAFCO's fixed assets. This staff member will submit the required paperwork to the Executive Officer as fixed assets are acquired and disposed of. This staff member will also tag the newly acquired asset and will audit the inventory on an annual basis.

3. Fixed assets purchased directly by LAFCO with a value above $7,500 shall be tagged to provide efficiency when conducting inventory, to allow the Commission's auditors to verify the Commission is in control of its fixed assets, and to provide an accurate record of the Commission's capital expenditures.

4. LAFCO staff shall be responsible for supplying a Fixed Asset ID Tag for any new fixed asset(s).

5. In order to acquire a new fixed asset, outside of the County of San Diego's procurement system, the Commission's procedures outlined in this section shall be followed. Although the procedures herein apply to fixed assets that meet the capitalization threshold of more than $7,500, all miscellaneous general assets and goods purchased outside of the County of San Diego's procurement system with an original cost of more than $1,000 must be inventoried.

a. Asset Addition Form: Upon receipt of the fixed asset valued at more than $7,500 or other assets and goods valued at more than $1,000, an *Asset and Goods Addition Form* shall be completed. This form shall be attached to the vendor invoice, if available, and submitted to LAFCO's purchasing clerk for payment. If the new asset is replacing an old asset, the method of disposal should be indicated on the bottom of the form. In addition, LAFCO must follow procedures for deleting the old asset (see instructions that follow).

c. Asset ID Tag: Upon receipt of the *Asset Addition Form* from the LAFCO purchasing clerk will furnish *Asset ID Tag*.

6. The Executive Officer is responsible for determining whether an asset is obsolete, damaged beyond repair, no longer needed, lost or stolen. Disposal of a fixed asset shall be reported <u>regardless of the original cost of the asset</u>.

a. Asset Deletion Form: LAFCO's purchasing clerk must fill out an *Asset Deletion Form* for all assets meeting the cost criteria in this procedure that are being disposed. Additional documentation should be attached to this form. Some examples would be the bill of sale, a copy of the purchase agreement stating the trade-in value of the old asset, documentation from a donated item, police report for a stolen asset, etc.

b. Assets Being Sent to Auction or Donation: A list of assets being sent to auction or donated must be received by the Executive Officer for approval. LAFCO may use the *Asset Deletion Form* to report the items requested for auction/donation.

7. LAFCO's purchasing clerk is responsible for accurately recording fixed assets, miscellaneous assets, and goods meeting the cost criteria in this procedure, providing *Asset ID Tags* to a designated individual, scheduling auctions with the vendor, working as a liaison to schedule annual department audits, and maintaining the appropriate documentation for outside audit purposes. LAFCO's bookkeeper will handle all fiscal year-end transactions for fixed assets, including depreciation.

a. Addition or Deletion Form: When the LAFCO purchasing clerk receives an *Addition* or *Deletion Form*, any additional documentation that is available should be obtained (*Purchase Order*, purchase agreement with trade-in information, etc).

b. Asset ID Tag: The LAFCO purchasing clerk will create an *Asset ID Tag* for newly purchased assets. The ID number is logged on the *Fixed Asset Addition Form* and in the corresponding Excel file.

c. Auction Payment: Upon receipt of payment from the vendor for any item(s) sold, the information should be recorded. The documentation received should be filed with the *Fixed Asset Deletion Form*.

d. Maintaining Audit Files: Any additional documents should be filed with its respective *Addition* or *Deletion Form*, according to fiscal year.

8. The Executive Officer may schedule a random audit to "spot check" the inventory of various assets. This will ensure that assets are being accounted for properly.

9. LAFCO will conduct an inventory on an annual basis either based on the fiscal or calendar year. The LAFCO purchasing clerk will send a list of all fixed assets to assigned staff. A designated person will check the list and make any necessary changes and send it back to the purchasing clerk and Executive Officer for update.