

# Samples of Explanation of Changes

## Sample 1

### Office of Chief Policy Officer

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

### Operations

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

## Sample 2

A. <del>Business Services</del>	<u>Administration</u>
1. Staff Services Director.....	2
2. Staff Services Manager.....	3
3. <del>Business Services Assistant Manager</del> <u>Administrative Services Manager</u> .....	3
<ul style="list-style-type: none"><li>▪ Business Services became Administration.</li><li>▪ The Business Services Assistant Manager was reclassified to Administrative Services Manager.</li></ul>	

### Sample 3

**Key**

- A = Abolished** (position no longer exists)
- D = Deleted** (position has been removed from the code – justification included)
- M = Moved** (position included in a different department)
- N = New** (position created since last code amendment)
- NC = No Change**
- R = Renamed**
- CC = Category Changed** (position assigned to a different category – justification included)

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

### Sample 4

<b>POLICY DEVELOPMENT AND ANALYSIS OFFICE</b>			
Deputy Director	1 and 2		
<b>All individuals in the following Policy Development and Analysis Office classifications or series:</b>			
Integrated Waste Management Specialist	2		
<u>Environmental Scientist</u>	<del>2</del>		<b>Commented [TWV5]:</b> This is a new position for this office. Throughout the Dept., many IWMS series positions have been converted to ES series positions. These amendments will add the ES series to all work units using the positions.
Research Analyst	2		
<b>AUDITS OFFICE</b>			
<b>All individuals in the following Audits Office classifications or series:</b>			
Management Auditor	2		
Associate Governmental Program Analyst	<del>2</del>		<b>Commented [TWV6]:</b> There are no AGPA positions on the current org. charts for the Audits Office. However, CalRecycle HR reports AGPA positions are planned/anticipated for Audits. Leaving AGPA in.
<b>OFFICE OF EDUCATION AND THE ENVIRONMENT</b>			
Deputy Director	1 and 2		
<b>All individuals in the following Office of Education and the Environment classifications or series:</b>			
Integrated Waste Management Specialist	7		
<u>Environmental Scientist</u>	<del>7</del>		<b>Commented [TWV7]:</b> This is a new position for this office. The ES series is being designated in all work units using the positions.
<u>Staff Services Manager</u>	<del>7</del>		
Associate Governmental Program Analyst	7		<b>Commented [TWV8]:</b> This is a new position for this office. The SSM series classification is consistently designated throughout the Dept.

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

### Sample 5

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