

RANCHO MURIETA COMMUNITY SERVICES DISTRICT

Category:	Personnel	Policy #	2026-04
Title:	Ethics and Fiscal Training Policy		

1. PURPOSE

This Policy establishes the District's procedures for ensuring that Board members and designated employees comply with the mandatory ethics training requirements of Assembly Bill 1234 (Government Code Sections 53234–53235.2) and the mandatory fiscal training requirements of Senate Bill 827 (Government Code Sections 53238–53238.4). Compliance with these training requirements is essential to sound governance, demonstrates the Board's commitment to transparency and fiscal accountability, and reduces the District's exposure to legal risk.

2. SUPERSESSION OF PRIOR POLICY

This Policy supersedes and replaces in its entirety Policy No. 2005-06 (Ethics Policy for Board of Directors), adopted by the Board of Directors on November 16, 2005. Policy No. 2005-06 is hereby repealed effective upon adoption of this Policy.

The substantive ethics and conduct obligations of Board members — including responsibilities of public office, fair and equal treatment, proper use of District property, use of confidential information, conflicts of interest, soliciting political contributions, the revolving door policy, and whistleblower protections — continue to govern Board member conduct as set forth in Chapter 10 of the Board of Directors Guidelines for Conducting Board Business and in the District's Conflict of Interest Code (District Code Chapter 3). This Policy does not supersede or modify those documents.

3. SCOPE

This Policy applies to:

- All members of the Board of Directors;
- The General Manager; and
- All other designated employees as defined in the District's Conflict of Interest Code (District Code Chapter 3) who are subject to training requirements under Government Code Section 53235.

4. REQUIRED TRAINING PROGRAMS

4.1 AB 1234 — Ethics Training (Gov. Code §§ 53234–53235.2). All covered officials must complete at least two (2) hours of ethics training that covers ethical principles, conflicts of interest, personal financial gain issues, gift restrictions and reporting, travel limitations, and transparency laws including the Ralph M. Brown Act and the California Public Records Act.

4.2 SB 827 — Fiscal Training (Gov. Code §§ 53238–53238.4). All covered officials must complete at least two (2) hours of fiscal training covering the proper oversight of public agency finances, including debt management, capital financing, appropriate investing, and auditing for fiscal compliance.

5. TRAINING DEADLINES

The following schedule governs initial and ongoing training obligations:

Training Program	Who Must Complete	Initial Deadline	Renewal
AB 1234 Ethics	Board Members, General Manager, designated employees	Within 6 months of assuming office	Every 2 years
SB 827 Fiscal	Board Members, General Manager, designated employees	Within 6 months of assuming office (for those assuming office in 2026 or later); by January 1, 2028 (for those in office prior to 2026)	Every 2 years

Note: Officials who assumed office prior to 2026 had until one year after assuming office to complete initial AB 1234 ethics training under prior law. Starting in 2026, the initial training window for new officials is shortened to six (6) months for both AB 1234 and SB 827.

6. APPROVED TRAINING PROVIDERS

Training must be obtained from a provider that offers programs meeting the content requirements of Government Code Sections 53235 and 53238. Approved sources include, but are not limited to:

- The Fair Political Practices Commission (FPPC) — online ethics training at www.fppc.ca.gov;
- The California Special Districts Association (CSDA) — ethics and governance training programs;
- The Special District Leadership Foundation (SDLF) — Special District Leadership Academy and related programs;
- The League of California Cities or California State Association of Counties (for joint training programs); and
- Other providers offering programs that satisfy the statutory content requirements, as approved by the General Manager or District legal counsel.

7. CERTIFICATES OF COMPLETION

Each official who completes a required training program shall obtain a certificate of participation or completion from the training provider and submit it to the District Secretary within thirty (30) days of completing the training. The District Secretary shall maintain training records for a minimum of five (5) years. Training records are public records subject to disclosure under the California Public Records Act (Gov. Code § 7920 et seq.).

8. TRACKING AND COMPLIANCE

The District Secretary, in coordination with the General Manager, shall be responsible for:

- Maintaining a current list of all officials subject to this Policy and their training deadlines;

- Providing written notice to each covered official of their training deadlines no later than ninety (90) days before the applicable deadline;
- Tracking receipt of certificates of completion and following up with officials who have not submitted certificates by the applicable deadline;
- Reporting training compliance status to the Board of Directors annually as part of the Board's organizational meeting agenda; and
- Notifying the General Manager and District legal counsel of any officials who have not completed required training within the applicable deadline.

9. COSTS

Reasonable costs of required training, including registration fees and related travel expenses consistent with the District's travel policy, shall be reimbursable as a District expense upon submission of receipts and a completed expense report. Board members and employees are encouraged to seek out no-cost training options, including the FPPC's online ethics training, where these satisfy the statutory requirements.

10. CONSEQUENCES OF NONCOMPLIANCE

While Government Code Sections 53235 and 53238 do not impose direct fines or penalties for failure to complete required training, noncompliance creates significant risks to the District including:

- Erosion of public trust and confidence in the Board's governance;
- Increased risk of inadvertent violations of conflict of interest, Brown Act, or public finance laws that adequate training would have prevented; and
- Adverse findings in future Grand Jury or State Controller reviews.

The Board of Directors expects all covered officials to complete required training on time. The General Manager shall include compliance with this Policy as a component of performance expectations for covered employees.

11. RELATIONSHIP TO CONFLICT OF INTEREST CODE AND BOARD GUIDELINES

This Policy is adopted independently of the District's Conflict of Interest Code (District Code Chapter 3) and the Board of Directors Guidelines for Conducting Board Business and does not modify or supersede any provision of those documents. Training completed pursuant to this Policy that covers conflict of interest topics complements but does not replace the disclosure and disqualification obligations established by Chapter 3 and the Political Reform Act.

12. POLICY REVIEW

The General Manager and District legal counsel shall review this Policy biennially and recommend any amendments necessary to reflect changes in applicable law. The Board of Directors reserves the right to amend this Policy at any time. The next scheduled review of this Policy shall be no later than July 2028.

Approved by Rancho Murieta Community Services District Board of Directors	Adopted July 14, 2026
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