

AGENDA ITEM 7.A.

MEETING: April 21, 2026
TO: Trinity LAFCo Commissioners
FROM: Amber Chung, LAFCo Clerk
SUBJECT: Form 700, Ethics, and Fiscal Training Reminders

BACKGROUND

The Political Reform Act (Government Code §§ 81000-91015) requires most state and local government officials to publicly disclose personal assets and income and to disqualify themselves from participating in governmental decisions that may affect their financial interests. The Fair Political Practices Commission (FPPC) is the state agency responsible for administering the Act, issuing the Statement of Economic Interests (Form 700), and interpreting its provisions.

In 2005, Assembly Bill 1234 (AB 1234) was enacted, requiring local agency officials to complete ethics training within one year of assuming office and every two years thereafter.

Effective January 1, 2026, Senate Bill 827 (SB 827, Chapter 661, Statutes of 2025) expands training requirements for local agency officials, including LAFCo Commissioners. These requirements are in addition to AB 1234 ethics training and Form 700 filing obligations.

DISCUSSION

Form 700 - Statement of Economic Interests:

Upon appointment or election to the Commission, Commissioners must file an Assuming Office Form 700. In addition, an Annual Form 700 covering the period from January 1 through December 31 must be filed each year.

- Annual Filing Deadline: April 1
- Filing Officer: LAFCo staff
- Access: Forms are retained by LAFCo and made available to the public upon request
- FPPC Website: <https://www.fppc.ca.gov/Form700.html>

Ethics Training (AB 1234):

Commissioners are required to complete ethics training within one year of assuming office (six months for officials assuming office on or after January 1, 2026), and every two years thereafter.

The FPPC offers an online ethics training course at:

<https://www.fppc.ca.gov/learn/public-officials-and-employees-rules-/ethics-training.html>

The course takes approximately 2.5 hours, may be completed in multiple sessions, and includes short quizzes following each section. Upon completion, Commissioners must save and submit the completion certificate to the Commission Clerk.

New Training Requirements Effective January 1, 2026 – SB 827

SB 827 establishes additional requirements applicable to Commissioners beginning in 2026:

- Accelerated Ethics Training Timeline: Officials assuming office on or after January 1, 2026 must complete ethics training within six months of assuming office.
- Fiscal and Financial Training: Commissioners must complete at least two hours of fiscal and financial training every two years, covering topics such as budgeting, financial reporting, fiscal oversight, revenues, and stewardship of public resources.
 - Due to the request of numerous LAFCoS, CALAFCO has worked with Best Best & Krieger (BBK) to allow free access to its SB 827 training for CALAFCO members. The *SB 827 Compliance Training: Essential Fiscal and Financial Oversight for Public Agency Officials* is available from now through December 31, 2026. This two-hour training is on demand and as such, may be completed at your convenience. You may start and stop as needed. Once you finish the training and complete the short survey at the end, BBK will email you a certificate of completion. Please see Attachment A for instructions on accessing the free webinar.
- Recordkeeping: LAFCo is required to retain ethics and fiscal training records for a minimum of five years and make information available regarding how training records may be requested.

RECOMMENDATION

Staff recommends the Commission receive and file this report. The Commission is invited to discuss the item and provide direction to staff as needed.

Commissioner Training Requirements

Commissioner	Current Form 700	Ethics Training	Fiscal Training
Julia Brownfield			
Jill Cox	YES	YES	
Liam Gogan			
Heidi Carpenter-Harris			
Andrew Johnson	YES		
Todd Corbett			
Lisa Harper	YES		
Anna C. Burke			
Jake Grossman-Crist			
Joseph Kasper	YES		

ATTACHMENTS

Attachment A: Access Instructions for CALAFCO SB 827 Fiscal and Financial Training



How to Access CALAFCO's Free SB 827 Webinar

CALAFCO members have free access to BBK's on-demand *SB 827 Compliance Training: Essential Fiscal and Financial Oversight for Public Agency Officials* from **now through December 31, 2026**. This two-hour training can be completed at your convenience, and you may start and stop as needed. Once you finish the training and complete the short survey at the end, BBK will email you a certificate of completion.

Please follow the **five steps** below:

Step 1: Register on the CALAFCO Website

Start by registering through CALAFCO using this link:

<https://calafco.starchapter.com/meetinginfo.php?id=14&ts=1776137616>

After you register, you will receive a confirmation email from CALAFCO with:

- your registration confirmation,
- the BBK registration link, and
- the CALAFCO member discount code

See Screenshot: Example of the CALAFCO confirmation email.

SB 827 Compliance Training: Essential Fiscal and Financial Oversight for Public Agency Officials

April 13, 2026

Virtual

2:00 PM - 4:00 PM

[Add to Calendar](#)

SB 827 Compliance Training: Essential Fiscal and Financial Oversight for Public Agency Officials

How to Register for the Training

1. Visit the registration link: [https://\[REDACTED\]](https://[REDACTED])
2. Complete the registration form with your individual information
3. When prompted for payment, enter the discount code: [\[REDACTED\]](#)
4. Your registration will be fully covered — no payment required

Have additional staff or officials who'd like to attend? Please have each attendee register individually at calafco.org. This helps CALAFCO track participation and demonstrate the value we're delivering to our members — information we report directly to our Board. Your discount code is an exclusive member benefit; please do not share it.

Step 2: Register with BBK

Use the BBK registration link and discount code provided in your CALAFCO confirmation email.

You will need to:

- open the BBK registration page,
- enter your information, and
- complete your registration.

Once you do that, BBK will send you a confirmation email with access to the webinar.

See Screenshot: Example of the BBK confirmation email.



Your registration for the **SB 827 Compliance Training: Essential Fiscal and Financial Oversight for Public Agency Officials** training is confirmed!

To access the training, please login to the attendee hub using the link below. Once logged in, locate the training title under "Upcoming Sessions" or "Schedule" and click to join the session.

[Login to Attendee Hub](#)

Agenda

Tuesday, March 24, 2026

10:00 AM - 12:00 PM

SB 827 Compliance Training: Essential Fiscal and Financial Oversight for Public Agency Officials

Add session to calendar

[ICS](#) [Outlook](#) [Apple](#) [Google](#)

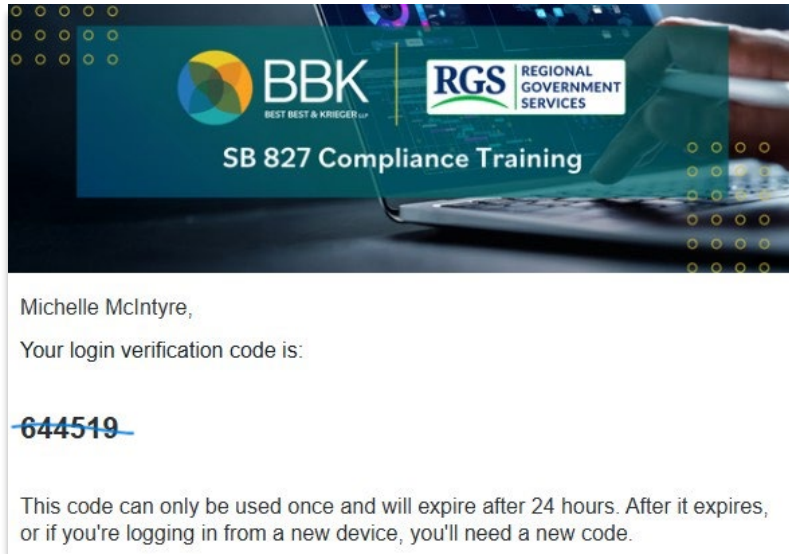
Step 3: Log In to the Attendee Hub

When you are ready to take the training:

- click the **Login to Attendee Hub** button in your BBK confirmation email (see screenshot from Step 2)
- Enter your name and email address.

BBK will then send you a one-time verification code by email (or text, depending on the info you provided).

See Screenshot: One-time Verification Code



Step 4: Complete the Training

The webinar is about two hours long. Since it is on-demand, you can stop and come back later if needed.

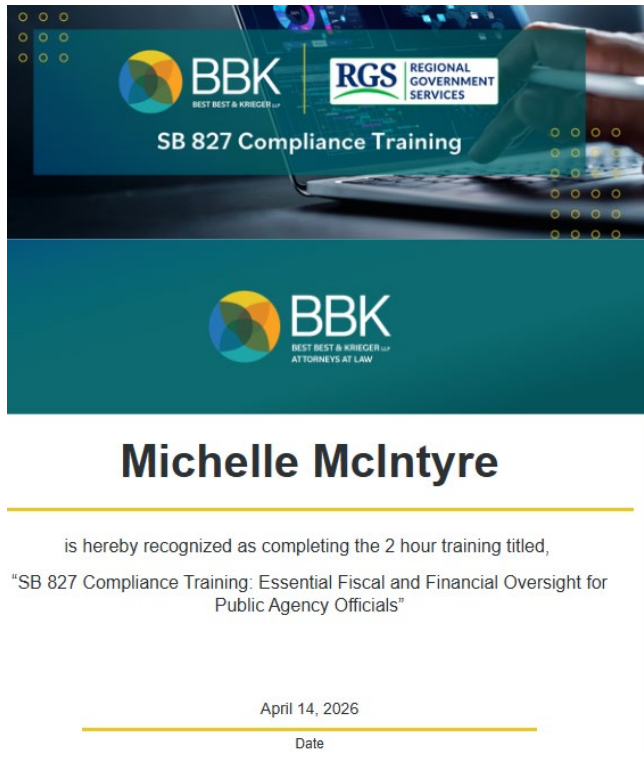
Be sure to complete the full training so you receive a certificate.

Step 5: Complete the Survey and Save Your Certificate

At the end of the webinar, BBK will ask you to complete a short survey. Once the survey is submitted, your certificate of completion will be emailed to you. Please save it for your records.

See Screenshot: Example of the certificate you will receive.

If you run into any issues getting logged in or accessing the training, please get in touch with me at mmcintyre@calafco.org. I'm happy to help.



The image shows a training certificate for Michelle McIntyre. At the top, there is a banner with logos for BBK (Best Best & Krieger LLP) and RGS (Regional Government Services), and the text "SB 827 Compliance Training". Below the banner, the name "Michelle McIntyre" is prominently displayed. Underneath the name, it states that she is recognized as completing a 2-hour training titled "SB 827 Compliance Training: Essential Fiscal and Financial Oversight for Public Agency Officials". The date "April 14, 2026" is written at the bottom, with a line above it and the word "Date" below it.

Michelle McIntyre

is hereby recognized as completing the 2 hour training titled,
"SB 827 Compliance Training: Essential Fiscal and Financial Oversight for
Public Agency Officials"

April 14, 2026
Date

We are also working with BBK to offer an in-person SB 827 training session at the CALAFCO Annual Conference, tentatively scheduled for Thursday, October 22, 2026. Please keep an eye on the CALAFCO website for additional details as they become available.