

Corkey Harmon
County Member

Chris Kelstrom
County Member

Allen Long
County Member Alternate

Susie Baugh
City Member

Pam Morgan
City Member

Tenessa Audette
City Member Alternate



Fred Ryness
Special District Member

Ronnean Lund
Special District Member

Rosemary Smith
Special District Alternate

Brenda Haynes
Public Member

Michael Spencer
Public Member Alternate

AGENDA ITEM 10.E.

Date: February 5, 2026

From: Krystle Brogna, Executive Officer

Subject: Form 700, Ethics, and Training Requirements Reminder

Staff will provide an overview of Form 700 filing obligations and ethics and training requirements and will make additional information available to Commissioners as needed.

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 and Alternates. 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 and Alternates 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 and Alternates 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 at amber@shastalafco.org.

New Training Requirements Effective January 1, 2026 (SB 827)

SB 827 establishes additional requirements applicable to Commissioners and Alternates 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 and Alternates must complete at least two hours of fiscal and financial training every two years (six months for officials assuming office on or after January 1, 2026), covering topics such as budgeting, financial reporting, fiscal oversight, revenues, and stewardship of public resources. Financial consultants and other financial professionals are developing training that complies with SB 827 and are expected to release these in the near future.
- **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.

Staff will incorporate these requirements into commissioner onboarding materials and compliance tracking beginning in 2026.

RECOMMENDATION

Staff recommends the Commission receive and file this report and provide direction to staff as needed.