

**COUNTY**<sub>OF</sub> **SAN MATEO**





# **Assessor County Clerk-Recorder & Elections**

## **FY 2017-19 Recommended Budget**

**Mark Church**  
June 19, 2017



# Mission Statement

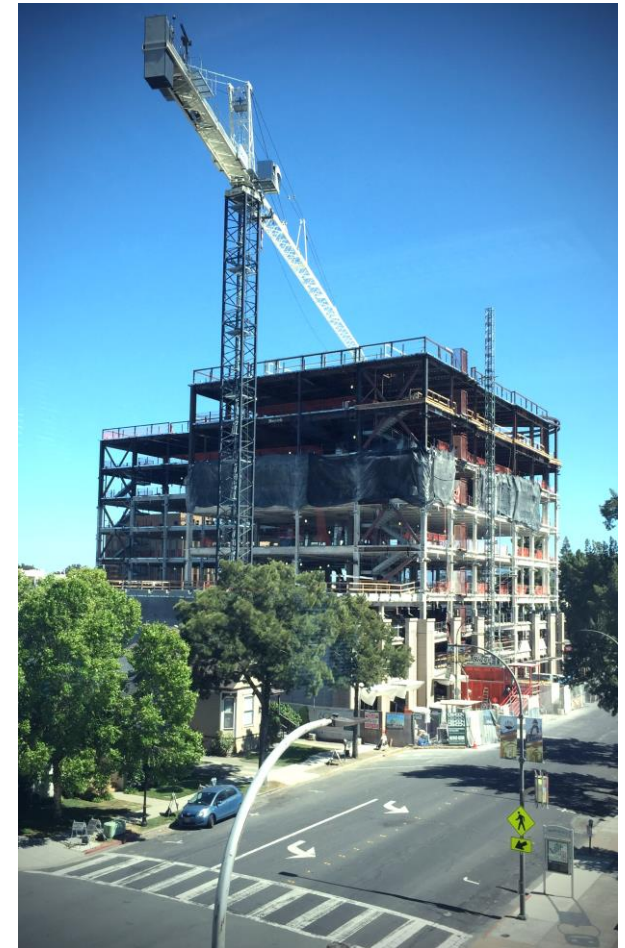
## ***“People First”***

- To ensure equitable service and treatment of San Mateo County property owners by accurate and fair valuation of land, improvements, and businesses.
- To create an accurate public record of recorded transactions relating to people and property within San Mateo County.
- To register San Mateo County citizens to vote and efficiently conduct transparent elections.
- To preserve and protect our historical and cultural records.



# Assessor Division Accomplishments

- **Assessment Roll** – Produced a \$204 billion Assessment Roll in FY 2016-17, up from \$191 billion in FY 2015-16, increasing the Roll by seven percent (\$13 billion).
- **Commercial Property Development**  
Valued two million square feet of completed projects and appraised approximately 12 million square feet under construction of new commercial property development in FY 2016-17.



# Assessor Division Accomplishments – Cont'd

- **Assessment Appeals**  
Successfully resolved 683 appeals, preserving \$2.6 billion of \$3.4 billion of roll value at risk in FY 2016-17.
- **Assessment Appeals Backlog** – Reduced the Assessment Appeals backlog by 23 percent.
- **Decline in Value Program** – Reduced the number of parcels participating in the Decline in Value Program by 44 percent and restored \$1.1 billion in assessed value.



# FY 2017-19 Assessor Division Challenges

- **Complexity of Assessment Roll**

Increasingly complex and diverse assessments (e.g., Facebook, Google, and Gilead; Mixed Use Facilities; etc.)

- **New Commercial Development**

- 58 million square feet of commercial real estate development projected over the next six years
- 21 million square feet under construction projected in FY 2017-19



- **Assessment Appeals**

- Over 1,000 appeals before the Assessment Appeals Board with a roll value of \$40 billion of which \$21 billion is at risk
- Another six cases before the courts with a roll value of \$15 billion of which \$2 billion is at risk



# FY 2017-19 Assessor Division Challenges – Cont'd

- **Legislative Environment and Proposals** – Embedded Software, Aircraft Valuations, Intangibles, etc.
- **Labor Market for Appraisal Staff**  
Recruitment of professional staff is challenging due to San Mateo County's limited labor market for professional and technical staff.



# Elections Division Accomplishments

- **Elections** – Conducted the Presidential Primary and General Elections, one countywide local consolidated election (UDEL) and seven special elections.
- **AB 2028** – San Mateo County became the first in the State of California to conduct a Countywide Local Consolidated All-Mailed Ballot Election.
- **Accessible Sample Ballot**  
Implemented one of the State's first remote accessible sample ballot systems for visually impaired voters.





# Elections Division Accomplishments – Cont'd

- **Voting Accessibility Advisory Committee (VAAC)** – Evaluates ADA requirements at polling places and provides advice on improving election services to persons with disabilities and the elderly.
- **North County Voting Center** – Established the South San Francisco Public Library Voting Center.
- **Outreach, Social Media and Public Service Videos** – Participated in numerous community events, increased our social media presence and produced educational videos for voters and Elections personnel.



# FY 2017-19 Elections Division Challenges

## ■ New State Election Law Mandates

- **SB 450** *California Voter's Choice Act*  
(Vote by Mail/Vote Center/Ballot Drop-Off)
- **SB 415** *California Voter Participation Rights Act*  
(Odd to Even-Numbered Year Elections)
- **AB 1436** *Same Day Voter Registration Law*
- **AB 1461** *California New Motor Voter Law*
- **AB 2252** *Remote Accessible Vote by Mail Systems*



# County Clerk-Recorder Division Accomplishments

- **Qmatic Digital Scheduling and Time Management System** – Improved customer experience and employee productivity.
- **Public Kiosk Homepage** – User friendly enhancements for public record searches and paperless online records requests, resulting in staff time savings and supporting our go-green initiative.
- **U.S. Department of State Passport Processing Facility** – Processed approximately 6,662 applications in FY 2016-17, a 49 percent increase from FY 2015-16.



# County Clerk-Recorder Division Challenges

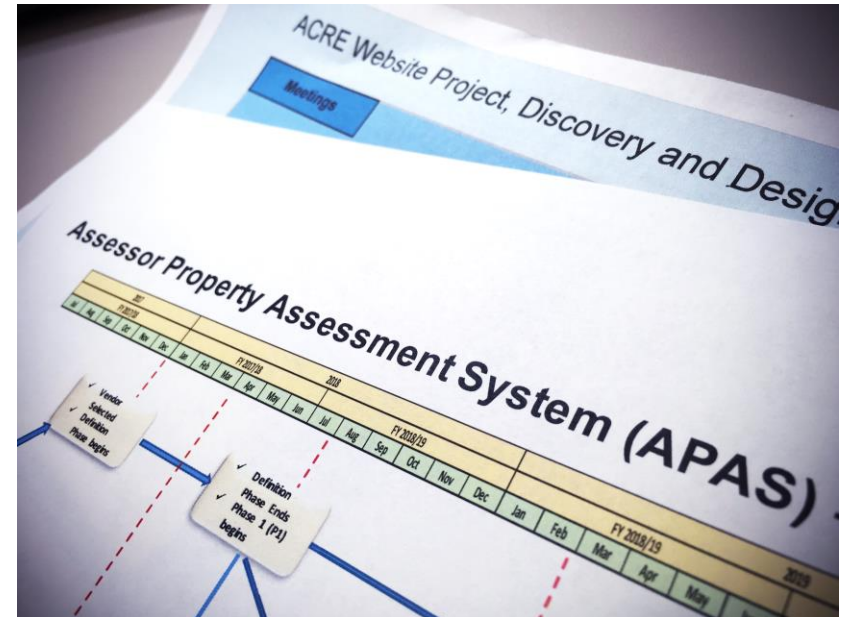
- **U.S. Department of State Passport Processing Facility**
  - Manage increasing workload

Fiscal Year	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17
No. of Passports	27	185	168	231	511	2,066	4,473	6,662
% Change		585%	-9%	38%	121%	304%	117%	49%
								Estimate

- **Documentary Transfer Tax Analysis**
  - Change in Ownership (CIO) complexity – corporate transfers, mergers, acquisitions, family trust step transactions, etc.

# Administration and Support Division Accomplishments

- **Assessor's Property Assessment System (APAS)**
  - Released the APAS RFP
  - Staff contributed over 3,000 hours for the replacement of our legacy system
  - Analyzing and developing interim solutions to our long term APAS project





# Administration and Support Division Accomplishments – Cont'd

- **Geographical Information Systems (GIS)**

- Played a major role in the development of the County's GIS five year plan
- Released the ACRE GIS RFP and completed the vendor selection process for the new Assessor's Parcel Layer, Tax Rate Area, and Elections Precinct Layers



- **Website Redesign**

- Released the ACRE website redesign RFP and selected the vendor



# Administration and Support Division Challenges

- **Assessor Property Assessment System (APAS)**
  - **Organizational Readiness**
    - Staffing
    - Office Space
    - Data Assessment and Clean up
  - **System Vendor Evaluation and Selection**
    - Completion of RFP process
  - **Data Conversion**
    - Develop RFP for Data Conversion vendor
  - **Project Resource Requirements**
    - Budget – Determination of system and project costs
  - **Implementation – Project Time Frame 3 to 3 ½ years**



# FY 2017-19 ACRE Priorities

- **New Construction** – Value approximately 4 million square feet of completed new construction and 14+ million square feet of partial construction annually.
- **New Technology** – Implement APAS, GIS, and our website redesign to replace our aging legacy systems and technology.
- **Elections Voting System** – Replace our current voting system to facilitate the implementation of SB 450 and new election laws.
- **AB 2252 Remote Accessible Vote by Mail Systems** – Implement new state-certified web based technology to provide visually impaired voters the ability to vote remotely.
- **Continuity of Operations Plan (COOP)** – Develop a department-wide COOP and Return to Operations (RTO) plan.
- **Tower Road Master Plan** – Develop architectural design and site plan for new Elections operations and County Clerk-Recorder storage facilities.
- **Historical Records** – Preserve and digitize the County's historical documents.



# FY 2017-19 Budget Overview

	FY 2016-17 Revised	FY 2017-18 Recommended	Amount Change	Percent Change
Total Sources	13,646,497	13,184,241	(462,256)	(3.4%)
Total Requirements	25,548,254	26,093,290	545,036	2.1%
Net County Cost	11,901,757	12,909,049	1,007,292	8.5%
Total Positions	121	121	-	-



# FY 2017-19 Budget Overview

	FY 2017-18 Recommended	FY 2018-19 Preliminary Recommended	Amount Change	Percent Change
Total Sources	13,184,241	20,352,927	7,168,686	54.4%
Total Requirements	26,093,290	33,710,260	7,616,970	29.2%
Net County Cost	12,909,049	13,357,333	448,284	3.5%
Total Positions	121	121	-	-



# FY 2017-19 Budget Overview

- **Significant Budget Changes**
  - **FY 2017-18**
    - \$3.1M for APAS long term and interim project solutions
  - **FY 2018-19**
    - \$5M for New Election System



# FY 2017-19 June Revisions

- **Assessor Division**

- Three regular positions – Principal Appraiser, Auditor-Appraiser II, and Assessor-Recorder Technician III
- Five Appraiser II Unclassified positions converted to:
  - Three Senior Appraisers (Classified); and
  - Two Appraiser II (Classified) positions

- **Elections Division**

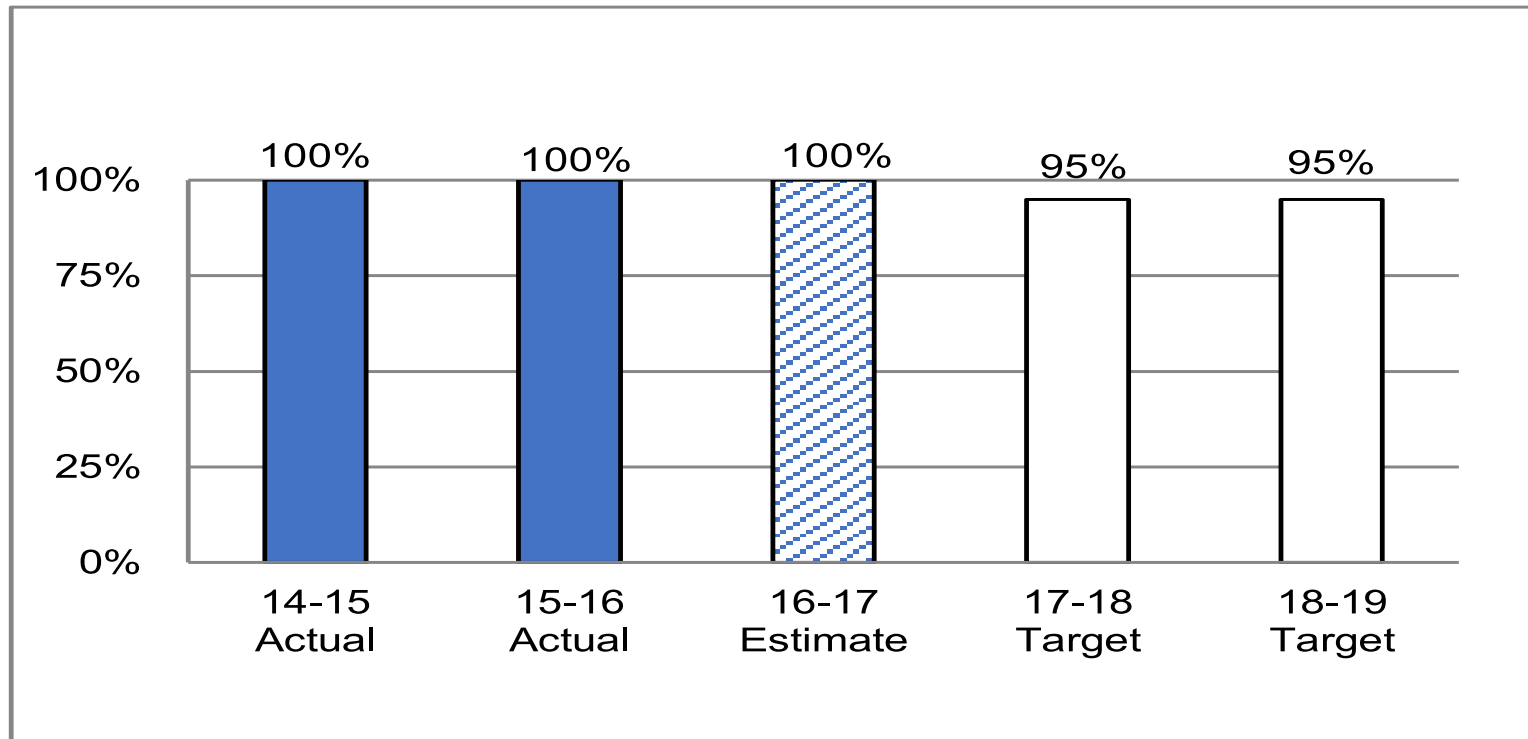
- Two regular positions – Management Analyst and Elections Specialist III





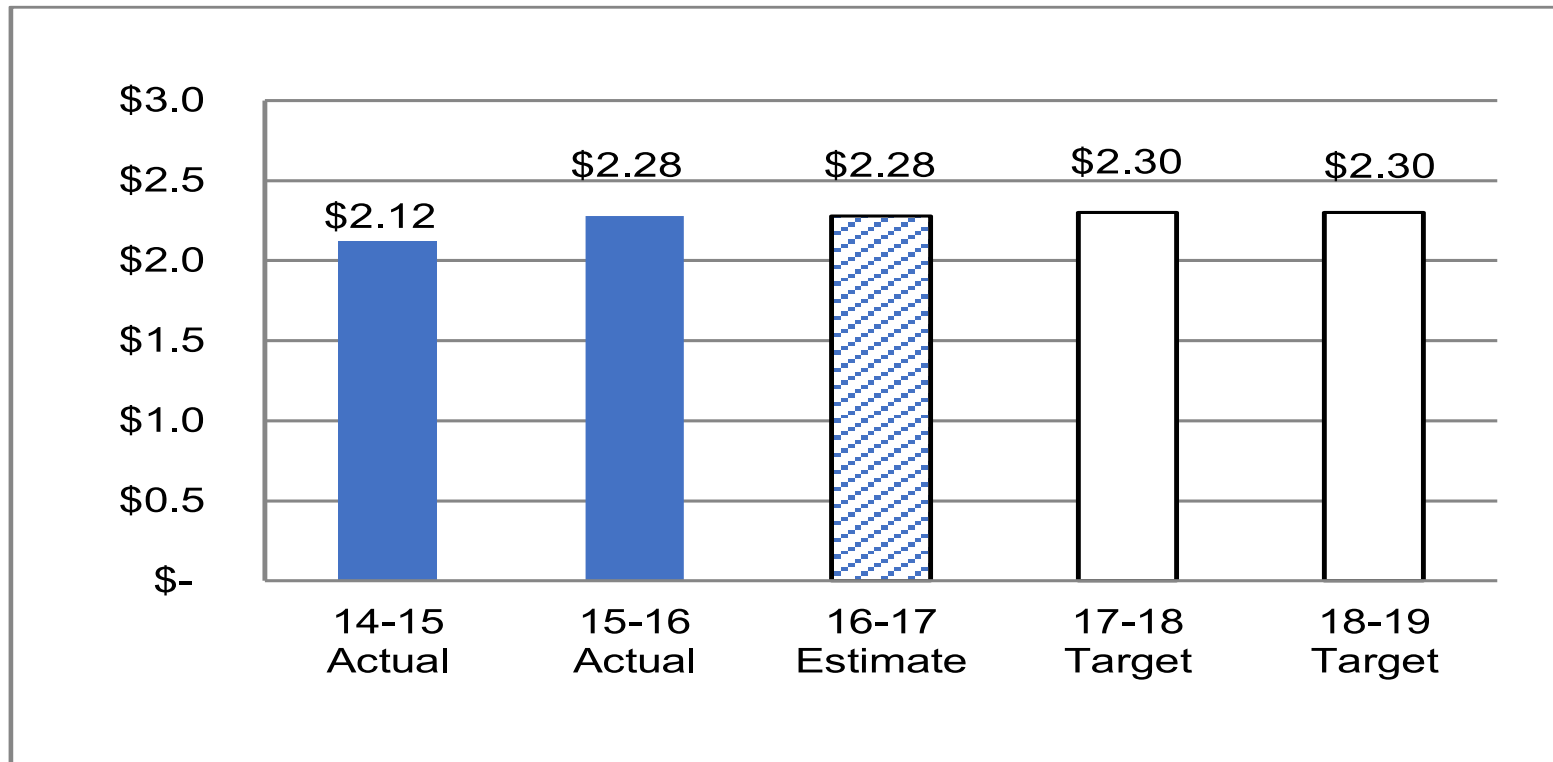
# Headline Measures

Percent of Constitutionally Mandated Real Property Activities Processed by Close of Roll



# Headline Measures - Cont'd

Average Roll Value per Assessor Staff (in Billions)



Thank you!



# Questions?



# COUNTY<sub>OF</sub> SAN MATEO



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