

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





# Assessor-County Clerk-Recorder & Chief Elections Officer

**Mark Church**  
June 22, 2015

COUNTY OF SAN MATEO



# Mission Statement

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

# FY 2015-17 Budget Overview

	FY 2014-15 Revised	FY 2015-16 Recommended	Amount Change	Percent Change
Total Sources	11,533,811	14,460,180	2,926,369	25%
Total Requirements	21,520,089	25,492,444	3,972,355	18%
Net County Cost	9,986,278	11,032,264	1,045,986	10%
Total Positions	117	118	1	Less Than 1%

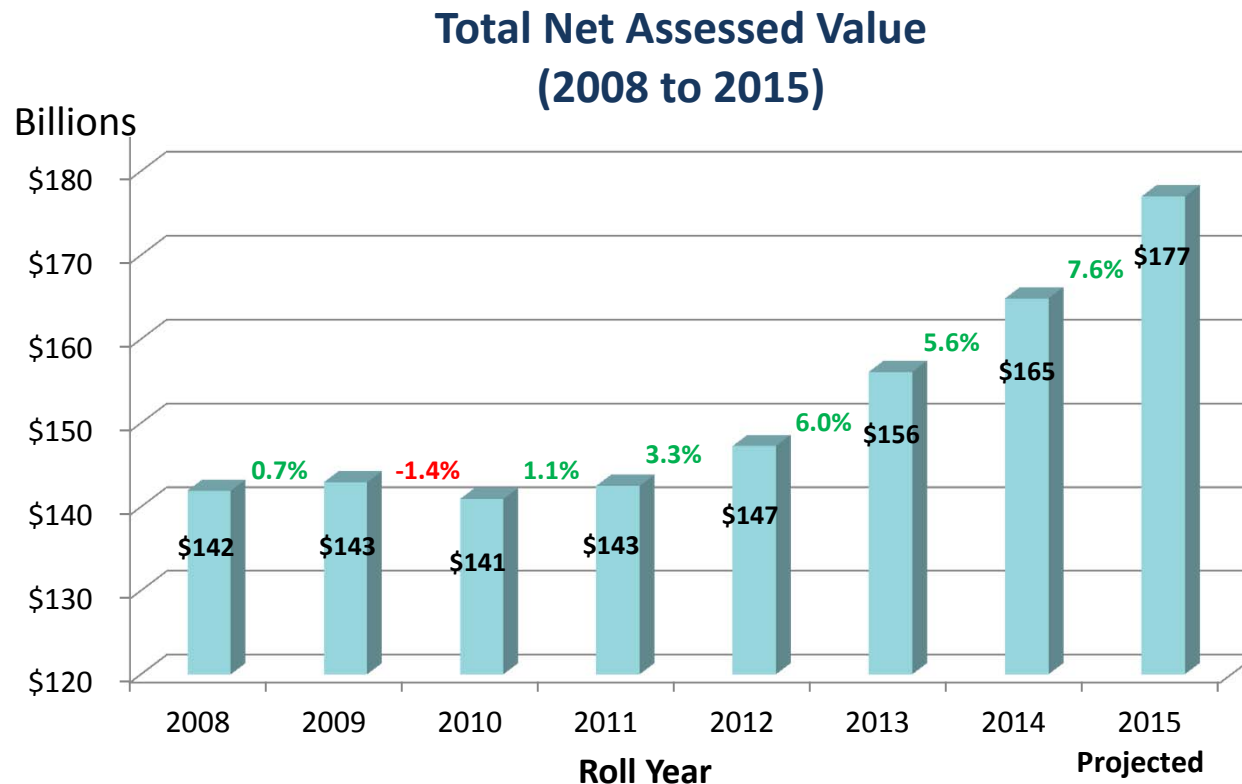
# FY 2015-17 Budget Overview

	FY 2015-16 Recommended	FY 2016-17 Recommended	Amount Change	Percent Change
Total Sources	\$14,460,180	\$11,286,823	(\$3,173,357)	-22%
Total Requirements	\$25,492,444	\$22,752,045	(\$2,740,399)	-11%
Net County Cost	\$11,032,264	\$11,465,222	\$432,958	4%
Total Positions	118	118	0	0%

# FY 2013-15 Accomplishments

## Appraisal Services

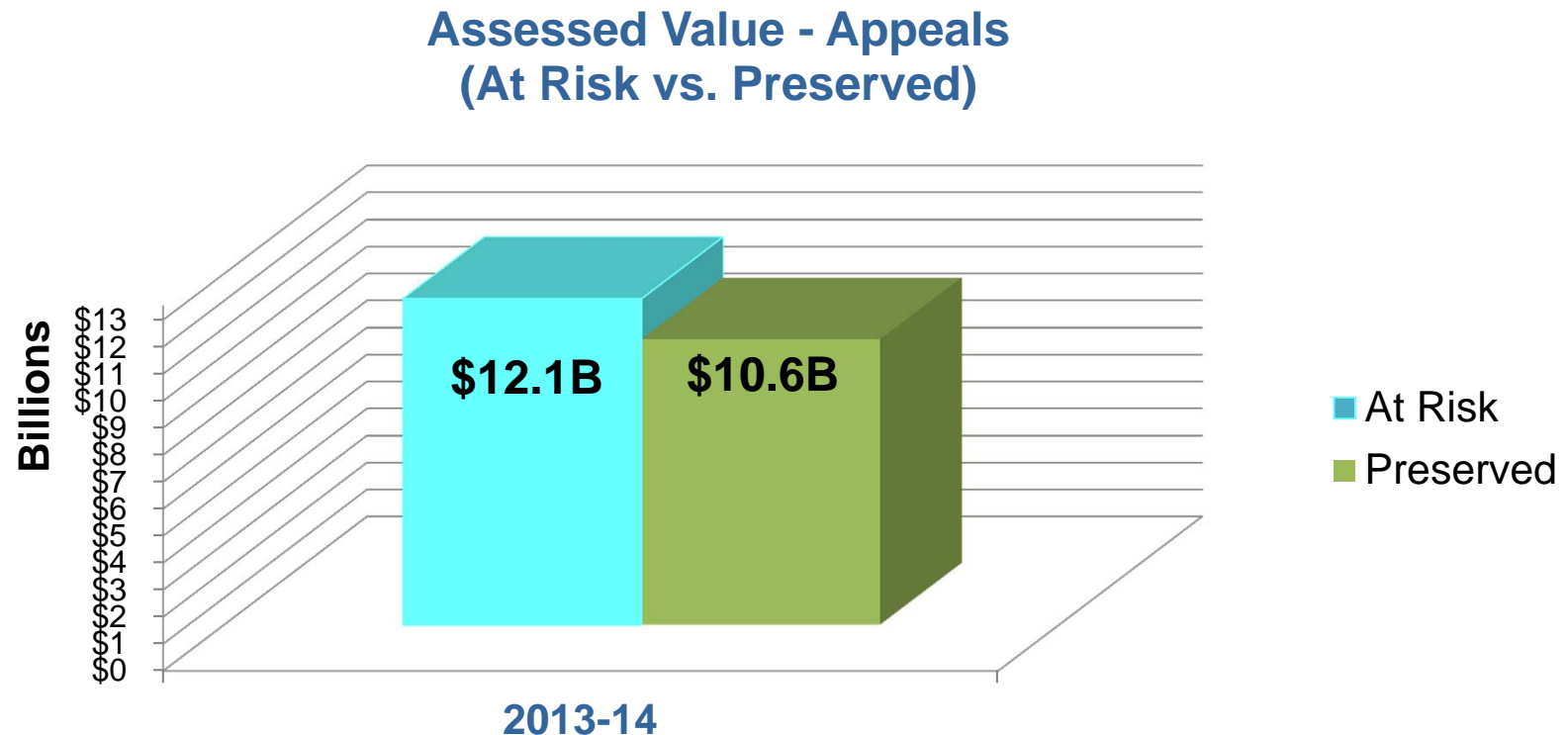
- ❑ **Assessment Roll** – Produced a \$165 billion assessment roll in FY 2013-14; increased the roll by 5.6% (\$8.75 billion); and processed all real and personal property activities on schedule.



# FY 2013-15 Accomplishments (cont'd)

## Appraisal Services

- ❑ Preserved \$10.6 billion resulting from Assessment Appeals

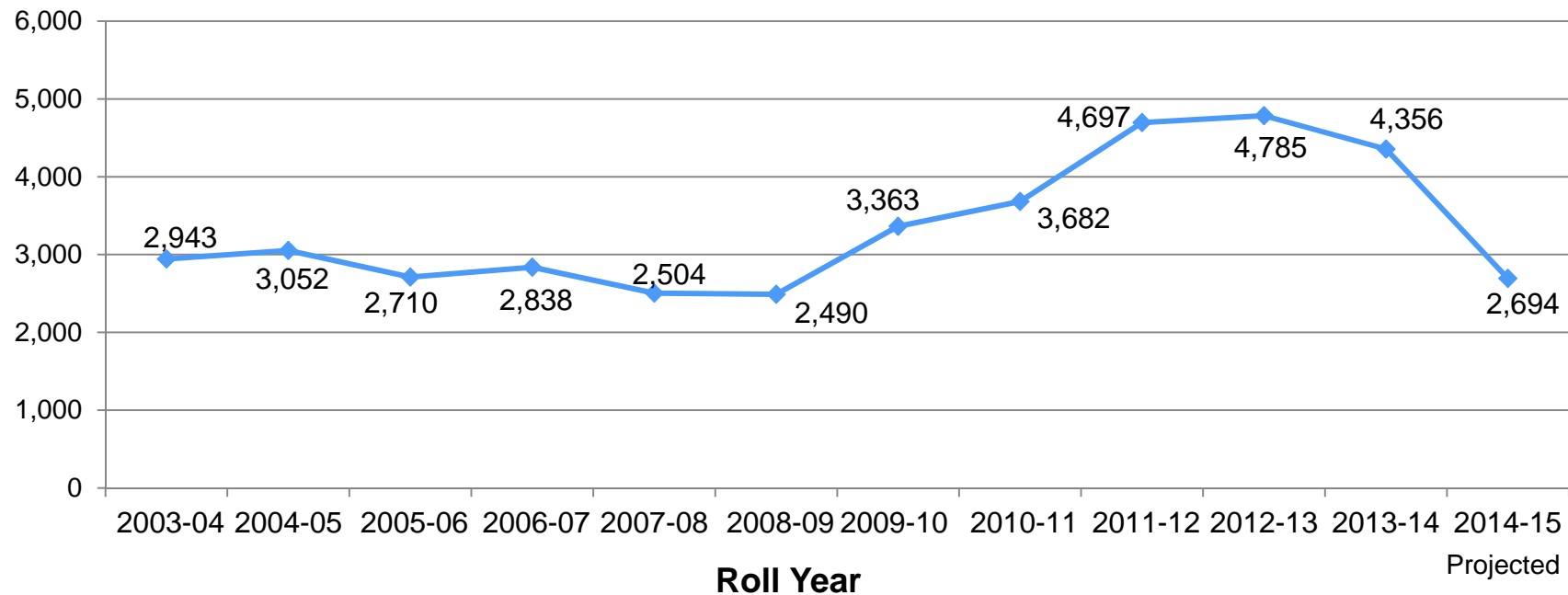


# FY 2013-15 Accomplishments (cont'd)

## Appraisal Services

- ❑ **Assessment Appeals** – Reduced the number of pending Appeals due to five additional appraisers

**Total Pending Appeals**



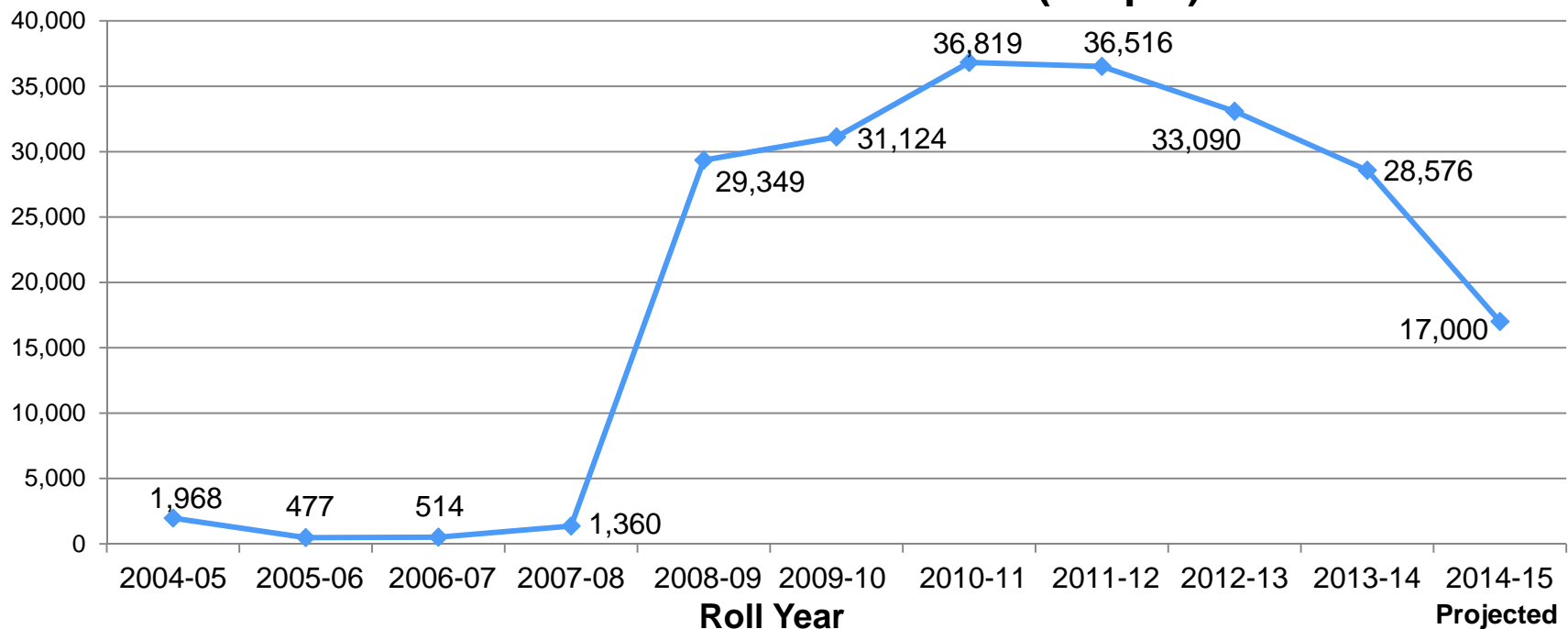


# FY 2013-15 Accomplishments (cont'd)

## Appraisal Services

- ❑ Reduced number of Declines due to additional five appraisers and implementation of a new valuation program.

### Decline In Value Reviews (Prop 8)



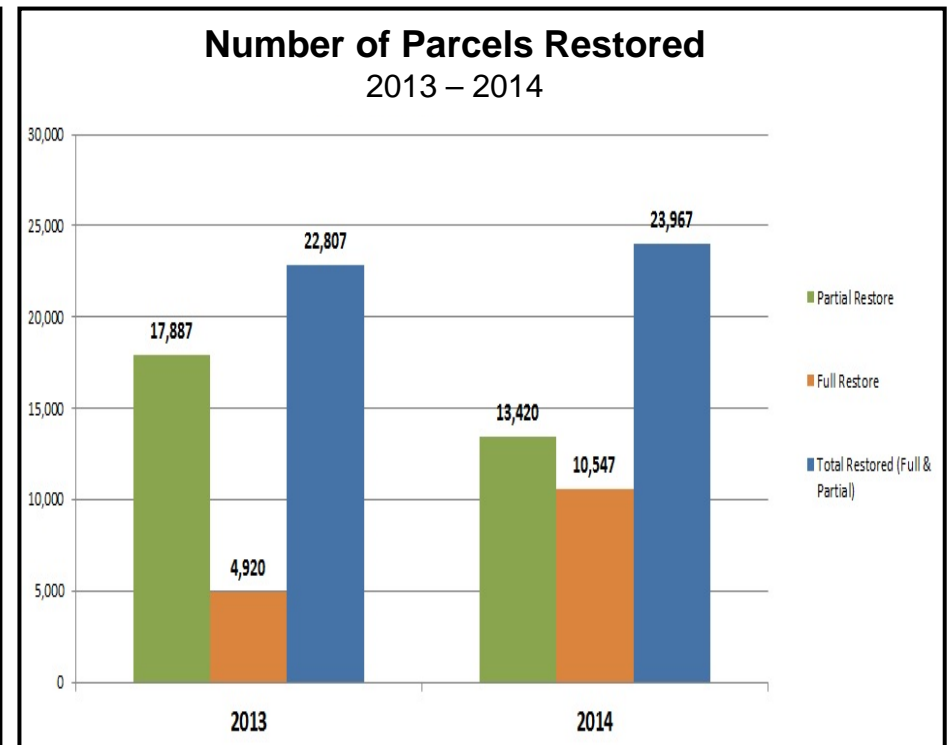
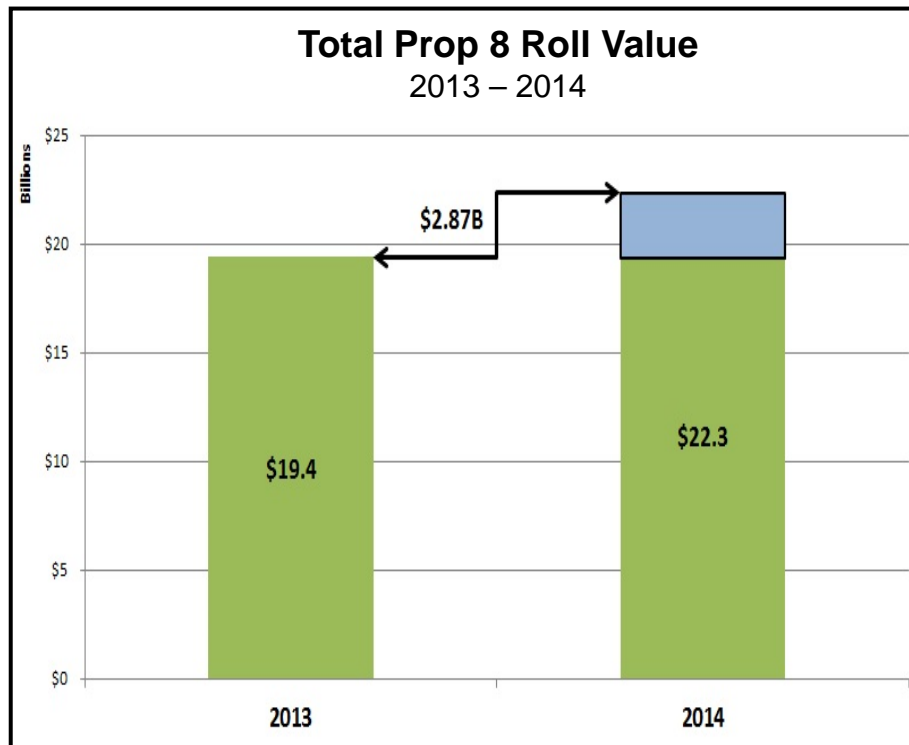
COUNTY OF SAN MATEO



# FY 2013-15 Accomplishments (cont'd)

## Appraisal Services

- Reviewed 28,600 parcels in the decline in value program, of which 13,420 parcels were partially restored and 10,547 parcels were fully restored, resulting in a net increase of \$2.87 billion in restored value



# FY 2013-15 Accomplishments (cont'd)

## Prop 8 Declines

(Value Difference - Assessed Value to Factored Base Year Value)



Value gap between factored base year value and assessed value continues to be reduced

COUNTY OF SAN MATEO



# FY 2013-15 Accomplishments (cont'd)

## Appraisal Services

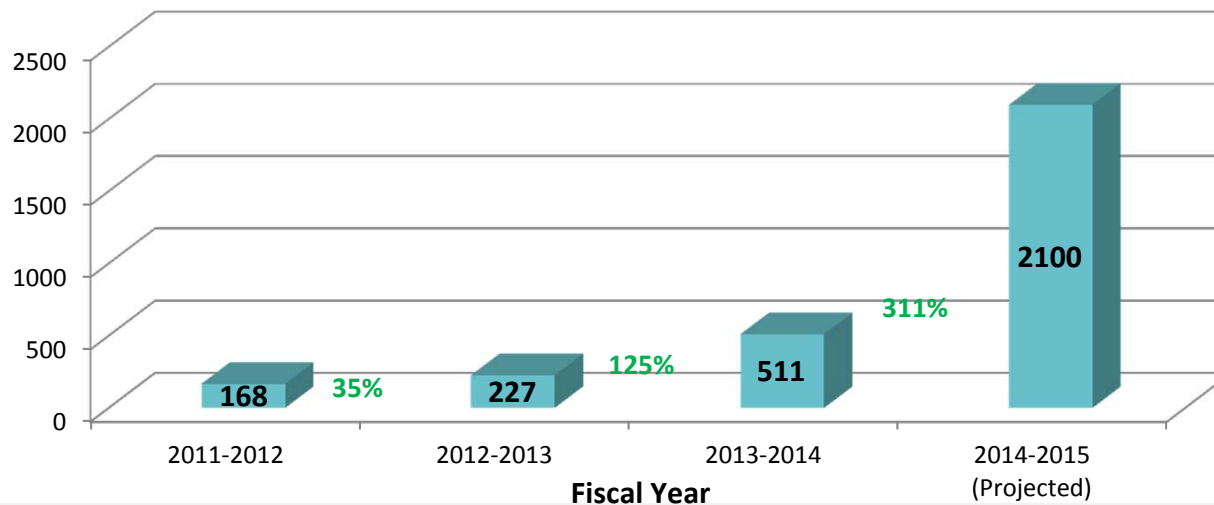
- ❑ Assessment Property Tax System (ATS) – Completed Phase 1, Defining the Current State of System, and will complete Phases 2 to 4, Defining Future State, Market Scan, Finalizing System Requirements and Procurement Plan, by July 2015.
- ❑ Assessor's Annual Report – Published our Assessor's Annual Report, providing a detailed overview of the Assessment Roll and the Property Tax Process.
- ❑ Assessment Standards Unit – Established a centralized Assessment Standards Unit to provide coordination of Assessor Division operations, improve organizational efficiencies and provide career growth opportunities.

# FY 2013-15 Accomplishments (cont'd)

## Clerk Recorder

- ❑ Social Security Number Truncation Program – Completed Phase III of Mandated Program (1980 through 1996)
- ❑ U.S. Passport Acceptance Facility – In FY 2013-14, a total of 511 passports were processed. In FY 2014-15, approximately 2,100 passports will be processed, a 311% increase over the previous fiscal year

**Number of Passports Processed**



# FY 2013-15 Accomplishments (cont'd)

## Elections

- ☐ AB 2028 All-Mail Ballot Pilot Program – Signed into Law with 26 jurisdictions passing resolutions to participate in the pilot program
- ☐ New Phone System – Successfully Installed a New Computerized Elections Phone System and Work Area
- ☐ Electronic Campaign Filing System – New campaign filing system ready to be launched
- ☐ Voter Accessibility Advisory Committee (VAAC) – Committee established and members selected; FY 2015-16 work plan to be developed
- ☐ Major Elections Conducted
  - Completed 2013 Local Consolidated Election and 2014 Statewide Primary Election in FY 2013-14
  - Completed 2014 Statewide General Election in FY 2014-15

# FY 2013-15 Accomplishments (cont'd)

## Administration & Support

- ❑ Assessor-County Clerk-Recorder & Elections Strategic Plan 2020 – Mission, Vision, Values and Motto, “People First”
- ❑ Employee Engagement

Department employees had a response rate exceeding 75% to the 2014 Employee Engagement Survey, one of the highest in the county

- ❑ Software Applications and Work Space Upgrades
  - GIS – Upgrade and Conversion Plan
  - File Net – Installed application upgrade

# FY 2015-17 Challenges

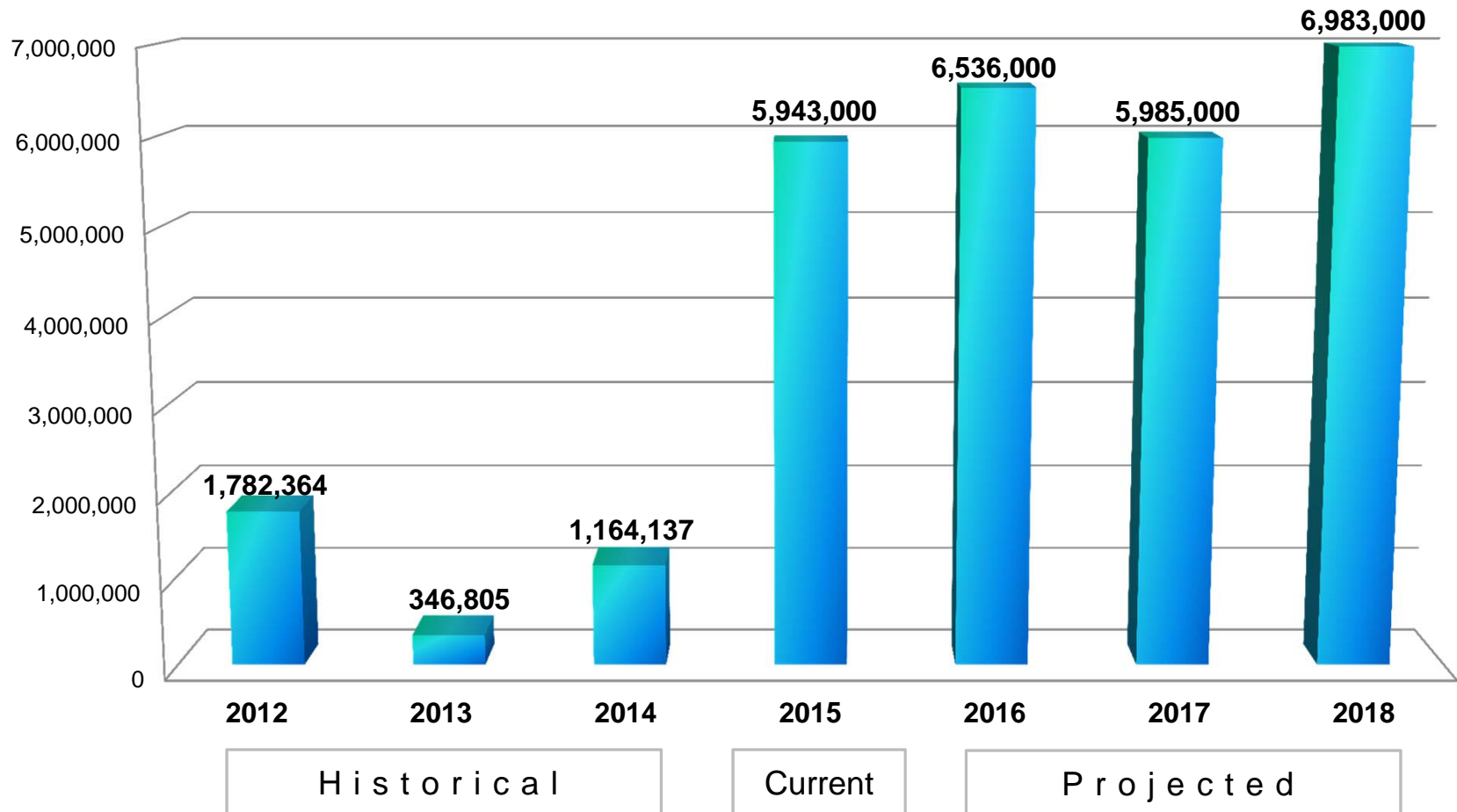
## Appraisal Services

### ❑ Commercial Development at Unprecedented Levels

- Current Commercial Development – 6.8 million square feet with building permits or under construction
- FY 2015-16 Commercial Development – 5.9 million square feet estimated to be completed this coming fiscal year
- FY 2016-17 Commercial Development – 6.5 million square feet of new development is projected for completion next year
- Staffing Levels – Insufficient to address an estimated 25.4 million square feet of new developments over the next four years



## New Commercial Development Construction Trends and Projections (Square Feet)



COUNTY OF SAN MATEO



# FY 2015-17 Challenges (cont'd)

## Appraisal Services

### ☐ **Recruitment and Retention of Professional Appraiser Staff**

- Independent Analysis – The Gartner Group report on ATS identified staff retention and recruitment as major risks to the Assessor's ability to sustain current operations
- Limited Labor Market Pool – for experienced Appraiser/Auditor candidates due to a strong financial services sector, state certification requirements, housing and cost of living
- Compensation Levels – for Senior Appraiser/Auditor classifications below labor market comparables

### ☐ **Retirements**

- Eligible Staff – 38% of department staff are eligible to retire

# FY 2015-17 Challenges (cont'd)

## Appraisal Services

- ❑ **Assessment Property Tax System (ATS) Implementation**
  - ATS Implementation – Phase 2 will be a significantly larger project than Phase 1 in terms of scope, funding and staffing
  - Data Cleansing, Conversion and Integration – are separate multi-year / multi-million dollar projects which occur in parallel to ATS
  - Staffing Resources – ATS requires dedicated full-time, senior staff subject-matter experts for three to five years. The short supply of these subject-matter experts creates a major challenge to staffing the ATS project
- ❑ **Litigation and Legislation** – Increased demands on resources due to aggressive and sophisticated Assessment Appeals, litigation and legislation

# FY 2015-17 Challenges (cont'd)

## Clerk Recorder

- ❑ U.S. Passport Applications – Address the increasing numbers of daily walk-in applicants
- ❑ Service Levels – Maintain service levels given the increased workload of walk-in customers, telephone calls and correspondence
- ❑ Storage Capacity and Hardware – Division's digital records system requires replacement of current disk storage space for archive data and backup due to end of hardware life cycle

# FY 2015-17 Challenges (cont'd)

## Elections

- ❑ Complexity of San Mateo County Elections – 20 Cities, 21 Special Districts, 25 School Districts and the County.
- ❑ Same Day Voter Registration – Costs associated with recruitment and training of additional Elections staff, development of new policies, procedures, tools and equipment (ballot boxes, hardware, software, etc.)
- ❑ Staffing Levels – below Bay Area Averages

## Administration & Support

- ❑ Resources and Technology – Outdated technology, tools and inadequate staffing resources impede our ability to efficiently administer Department operations and respond to numerous data requests from the public, county departments and other agencies.

# FY 2015-17 Priorities

## Appraisal Services

- ❑ Comprehensive Classification and Compensation Plan – Retain an independent consultant to address structural recruitment and retention challenges of senior and professional level appraisal services staff.
- ❑ Assessment Property Tax System – Develop RFP, Evaluate and Select Vendor, Data Cleansing, Conversion and Integration.
- ❑ Geographical Information System – Implement a new GIS to improve cadastral data, technology & customer support.

# FY 2015-17 Priorities (cont'd)

## Clerk-Recorder

- ☐ Digital Conversion – Digital imaging of vital records for years prior to 1966 and land records for years prior to 1980
- ☐ Historical Preservation of Documents – Restore, repair and preserve the physical integrity of paper documents relating to land transactions, vital records and legal instruments dating back to 1846
- ☐ Customer Service Improvements – Customer service training and workshops and improve public and staff work areas

# FY 2015-17 Priorities (cont'd)

## Elections

- ❑ AB 2028 All-Mail Ballot Pilot Project Implementation – November 2015 and November 2017 UDEL Elections
- ❑ Elections – June 2016 Presidential Primary and November 2016 Presidential Elections
- ❑ Voter Outreach – Expand voter outreach and education program
- ❑ Website – Enhance web and social media presence
- ❑ Voting System – Evaluation and analysis to replace current voting system in FY 2018-19

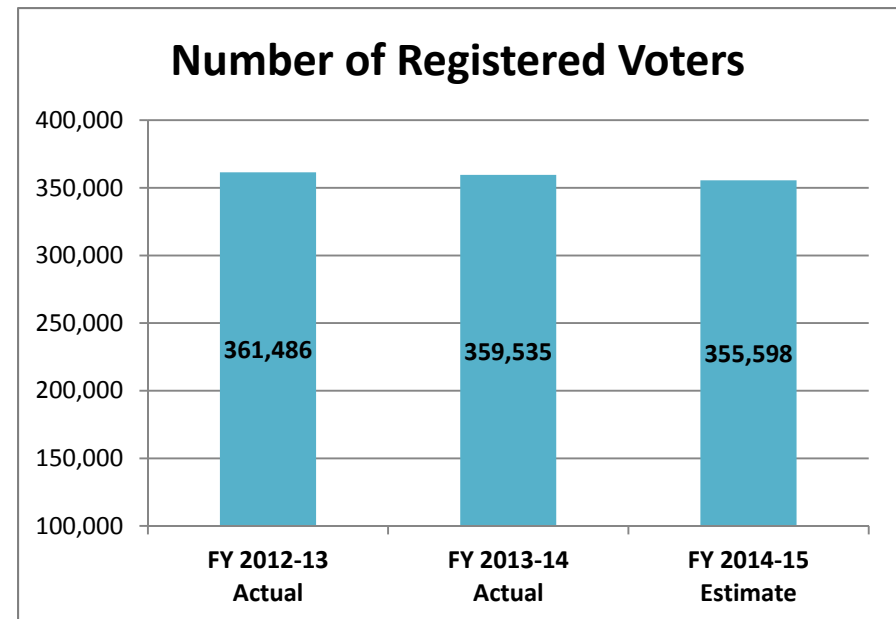
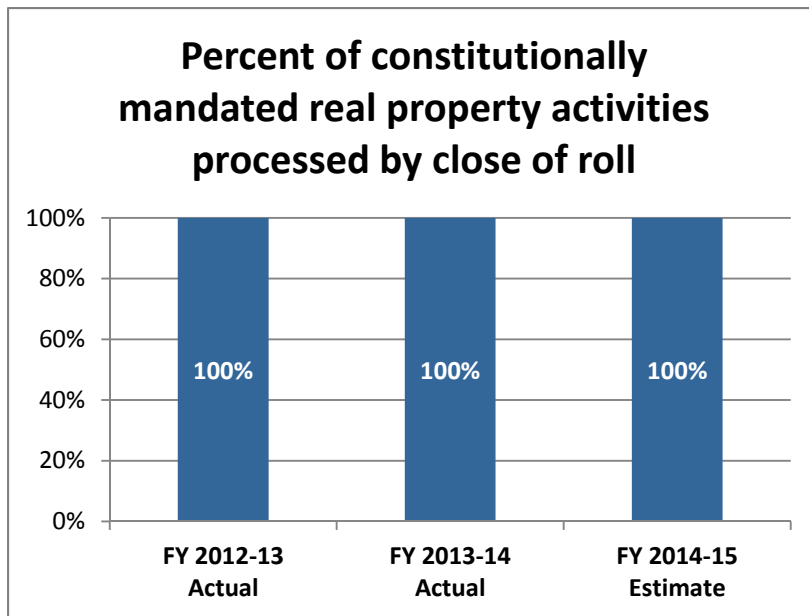


# FY 2015-17 Priorities (cont'd)

## Administration & Support

- ❑ Strategic Plan – Implement Assessor-County Clerk-Recorder & Elections Strategic 2020 Plan
- ❑ New Telephone System – Design & implement a new computerized telephone system to replace the aging and outdated system in the Redwood City facility
- ❑ Disclosure Statement (Form 700) – Implement electronic filing of Conflict of Interest Statement

# Assessor-County Clerk-Recorder



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