



# ASSESSOR, CLERK-RECORDER

BOARD OF SUPERVISORS' BUDGET HEARING

Presented by: Marina Camacho

May 31-June 2, 2023

# ASSESSOR CORE FUNCTIONS

- ▶ Annually, the Assessor assesses all taxable property in his/her county, excepting state assessed property, to the persons owning, claiming, possessing, or controlling it on the lien date (R&T 405(a)).
- ▶ Establishes accurate and fair assessed property values
- ▶ Provides an accurate assessment roll to the Auditor's office by July 1st of each year
- ▶ The annual assessment roll becomes the base upon which local property taxes are levied, collected and subsequently distributed to the cities, County, and special districts to fund government services.
- ▶ 60-70% of the County's discretionary funds
- ▶ State of California Board of Equalization county mandated survey

# CLERK-RECORDER CORE FUNCTION

- ▶ Records real property documents and act as the Public Repository for these recorded documents
- ▶ Recorded information is kept permanently for research and issuance of certified copies
- ▶ Registers and issues Monterey County birth and death certificates
- ▶ Registers and issues marriage licenses
- ▶ Enforces mandated legislative changes (AB1466)
- ▶ Files California Environmental Quality (CEQA) documents
- ▶ Acts as the Local Filing Official for the Fair Political Commission for the filing of certain Statements of Economic Interests

# GENERAL FUND CONTRIBUTION (GFC) TO ASSESSOR, CLERK-RECORDER

- ▶ GFC to the Assessor, Clerk-Recorder's Office has not increased over the last couple of Fiscal Years and the department has been able to absorb:
  - ▶ Union negotiated salary increases
  - ▶ Insurance cost increases
  - ▶ Wage study increases
- ▶ Returned surplus funds to GF during more solvent years
  - ▶ 2019
  - ▶ 2020
  - ▶ 2021
- ▶ FY 2022-2023 brought unforeseen budget challenges
  - ▶ Interest rate hikes
  - ▶ Reduced recordings
  - ▶ Reduced Documentary Tax Collection

# ASSESSOR, CLERK-RECORDER STAFF

## FY 23-24 Recommended FTE

YEAR	POSITIONS
2020-2021	69
2021-2022	69
2022-2023	69
2023-2024 (baseline)	61 (8 vacancies during augmentations presentation)
2023-2024 (recommended)	<b>65</b> (Recommended budget)

# AUGMENTATION REQUEST FOR \$389,000

## (ITEMS NOT INCLUDED IN FY 23-24 RECOMMENDED BUDGET)

	DEPARTMENT	POSITION	REQUEST	JOB DESCRIPTION	IMPACT
1.	8003	Property Transfer Clerk	\$90,000	Analyze/process/apply title changes, Change in Ownership Exclusions, apply R&T mandated penalties, and reappraisals due to Prop 19	<ul style="list-style-type: none"> <li>• Delayed processing state mandated penalties</li> <li>• Apply Prop 19 value increases,</li> <li>• And overall less staff to meet customer service standards</li> </ul>
2.	8003	Map Drafting Technician	\$105,000	Update and Maintain GIS Parcel/fabric, perform skilled work in creation/maintenance of standard maps, update State approved TRA's for assessment purposes and provide customer service to general public	<ul style="list-style-type: none"> <li>• GIS Parcel/Fabric layer will not reflect updated boundary changes</li> <li>• Agencies will not have accurate information</li> <li>• Corrections to layer will be delayed</li> <li>• Untimely Customer service</li> </ul>
3.	8004	OA III	\$102,000	Index/verify vital records (paper/electronic), run daily reports, process sealing notices and vital records requests for CDPH(state Dept of Public Health), apply mandated legislative changes AB1466: redact illegal and discriminatory language	<ul style="list-style-type: none"> <li>• Less staff to redact illegal and discriminatory language mandated by AB1466</li> <li>• Customer service will suffer</li> </ul>
4.	8003	Assessment Clerk	\$92,000	Analyze/process/apply HOEX/DVE/Welfare Exemptions, assist/explain exemption guidelines to taxpayers, and process new construction permits	<ul style="list-style-type: none"> <li>• Delayed in processing exemptions</li> <li>• Delayed in permit processing</li> <li>• Customer service will suffer</li> </ul>

# VALUES TO THE LOCAL ASSESSMENT ROLL

- ▶ Enrolled supplemental values added to the local roll to date = \$981M
- ▶ Remaining supplemental assessments to be enrolled = 2,400
- ▶ Tentative additional revenue \$1B
  - ▶ Average supplemental = \$421k
- ▶ The assessment roll becomes the base upon which local property taxes are levied, collected and distributed to the cities, County and special districts to fund government services.
- ▶ Having a fully staffed department directly impacts:
  - ▶ Timely enrollment of supplemental assessments which equates to more revenue for
  - ▶ the County of Monterey
  - ▶ fund department core functions/local jurisdictions/schools/fire districts

# 2022 REVENUE CHALLENGES

- ▶ Revenue generated from recording fees has seen a decrease
- ▶ Due to understaffing, the timely processing of all pending supplemental assessment events has been delayed
  - ▶ Delayed supplemental assessment enrollment affects adding significant value to the tax roll generated by:
    - ▶ Sales
    - ▶ Prop 19 legislative changes
    - ▶ New construction/Change In Ownership
  - ▶ AB1466: legislative mandated redaction of illegal discriminatory language in recorded documents
  - ▶ Maintaining GIS parcel layers and updates critical and beneficial to County of Monterey



**QUESTIONS?**