

Instructions:

- Please complete all eight tabs. All answers should be entered into the text box provided. Please expand text boxes as needed.
- Applications are due **September 15, 2014.**
- Please print the completed application, sign and date the signature block below, and submit your signed application in .PDF along with a completed Excel version.
- Along with your application, please attach a copy of your County Board of Supervisors' resolution agreeing to match any and all awarded program funds.
- Please e-mail the application to: Chris.Hill@dof.ca.gov and Derk.Symons@dof.ca.gov
- Please enter on the E-mail subject line: **State-County Assessors' Partnership Program Application for the County of** (name of your county).

If you have any questions, please send us an e-mail to either of the above addresses, or call us at (916) 445-1546.

I, the undersigned, agree on behalf of the County of (insert name of county here) to abide by all statutory criteria and associated California Department of Finance decisions governing the operation of the State-County Assessors' Partnership Program, in the event that the county is selected as a Program participant.

Stephen L. Vagnini

Name

Monterey County Assessor Clerk/Recorder

Title

Signature (Written)

Stephen L. Vagnini

Signature (Electronic)

\$200,000

Amount Requested

Discovering, Assessing, and Enrolling New Construction

<p>Question 1: How many new staff do you anticipate funding for this activity using Program funds? Alternatively, if your office does not plan to add new staff, but instead plans to use Program funds in some other way that will supplement instead of supplant existing staff resources for this activity, please explain how that will be done.</p>	<p>Answer to Question 1: : We plan to use the funding to hire a total of FOUR (4) new appraisers combined for all aspects of this grant. The appraisers will devote a portion of their time working on this component. All appraisers will work on discovering, assessing and enrolling new construction.</p>						
<p>Question 2: What was the dollar value enrolled by existing staff in 2013/14 through discovering, assessing, and enrolling newly constructed property?</p>	<p>Answer to Question 2: \$205,212,766</p>						
<p>Question 3: What is the estimated dollar value anticipated to be enrolled by Program staffing in each fiscal year through discovering assessing, and enrolling newly constructed property?</p>	<p>Answer to Question 3:</p> <table> <tr> <td>2014-2015</td> <td>\$20,000,000</td> </tr> <tr> <td>2015-2016</td> <td>\$20,000,000</td> </tr> <tr> <td>2016-2017</td> <td>\$20,000,000</td> </tr> </table>	2014-2015	\$20,000,000	2015-2016	\$20,000,000	2016-2017	\$20,000,000
2014-2015	\$20,000,000						
2015-2016	\$20,000,000						
2016-2017	\$20,000,000						
<p>Question 4: What is the estimated backlog of new construction assessments and enrollments?</p>	<p>Answer to Question 4: There is a backlog of approximately 100 new construction assessments and enrollments. The reason that this number is not considerably higher is because we have requested and have been granted an extension to close the local tax roll the last three years.</p>						
<p>Question 5: What is the estimated rate at which the Program staffing will reduce this backlog?</p>	<p>Answer to Question 5: It is estimated that the new Program staffing will eliminate the backlog in its entirety the first year and hence enable our office to find additional assessments through discovery with the use of GIS.</p>						
<p>If applicable: If your county plans to use Program funds to procure information technology (IT) resources to aid in this activity, describe the IT system and the benefits it will provide, including the estimated change in assessed valuation that it will change to the roll in each fiscal year.</p>	<p>IT System: N/A</p>						
<p>Please provide any additional pertinent information the Department of Finance should consider regarding this particular activity as it relates to your county .</p>	<p>Additional Information: Due to current staffing shortfalls, the Monterey County Assessor Administrative/Management staff have been working out of class while performing the duties of line appraisers to perform these assessment/valuation duties. These management staff members are no longer able to perform these functions due to pressing issues and otherwise have postponed critical administrative obligations. Therefore, the additional staff funded by this grant are necessary to both backfill for the tasks that can no longer be performed by management, as well as address the existing backlog associated with these assessments/valuations. In addition, these new staff members can also fill a need for new skilled technicians who are specialists in the use of GIS as a discovery tool, which is critical in this, a predominantly rural county.</p>						

Discovering, Assessing, and Enrolling Change of Ownership

<p>Question 1: How many new staff do you anticipate funding for this activity using Program funds? Alternatively, if your office does not plan to add new staff, but instead plans to use Program funds in some other way that will supplement instead of supplant existing staff resources for this activity, please explain how that will be done.</p>	<p>Answer to Question 1: : We plan to use the funding to hire a total of FOUR (4) new appraisers combined for all aspects of this grant. The appraisers will devote a portion of their time working on this component. All appraisers will work on discovering, assessing and enrolling of changes of ownership.</p>
<p>Question 2: What was the dollar value enrolled by existing staff in 2013/14 through discovering, assessing and enrolling changes of ownership?</p>	<p>Answer to Question 2: : \$897,971,747</p>
<p>Question 3: What is the estimated dollar value anticipated to be enrolled by Program staffing in each fiscal year through discovering, assessing and enrolling changes of ownership?</p>	<p>Answer to Question 3:</p> <p>2014-2015 \$40,000,000 2015-2016 \$40,000,000 2016-2017 \$40,000,000</p>
<p>Question 4: What is the estimated backlog of the change of ownership reassessments?</p>	<p>Answer to Question 4: The number of change of ownership reassessments is estimated at 300. The reason this number is not considerably higher is because we have requested and have been granted an extension to close the local tax roll for the last three years.</p>
<p>Question 5: What is the estimated rate at which the Program staffing will reduce this backlog?</p>	<p>Answer to Question 5: We anticipate eliminating this backlog in its entirety within 2 years.</p>
<p>If applicable: If your county plans to use Program funds to procure information technology (IT) resources to aid in this activity, describe the IT system and the benefits it will provide, including the estimated change in assessed valuation that it will change to the roll in each fiscal year.</p>	<p>IT System: N/A</p>
<p>Please provide any additional pertinent information the Department of Finance should consider regarding this particular activity as it relates to your county .</p>	<p>Additional Information: Due to current staffing shortfalls, the Monterey County Assessor Administrative/Management staff have been working out of class while performing the duties of line appraisers to perform these assessment/valuation duties. These management staff members are no longer able to perform these functions due to pressing issues and have otherwise postponed critical administrative obligations. Therefore, the additional staff funded by this grant are necessary to both backfill for the tasks that can no longer be performed by management, as well as address the existing backlog associated with these assessments/valuations. In addition, these new staff members can also fill a need for new skilled technicians who are specialists in the use of GIS as a discovery tool, which is critical in this, a predominantly rural county.</p>

Processing Supplemental Assessments

<p>Question 1: How many new staff do you anticipate funding for this activity using Program funds? Alternatively, if your office does not plan to add new staff, but instead plans to use Program funds in some other way that will supplement instead of supplant existing staff resources for this activity, please explain how that will be done.</p>	<p>Answer to Question 1 .We plan to use the funding to hire a total of FOUR (4) new appraisers combined for all aspects of this grant. The appraisers will devote a portion of their time working on this component. All appraisers will work on new construction, appraisals of changes of ownership and valuation of properties that have been lowered under Proposition 8.</p>						
<p>Question 2: What was the dollar value enrolled by existing staff in 2013/14 through processing supplemental assessments for real property that has changed ownership?</p>	<p>Answer to Question 2: \$1,103,184,513</p>						
<p>Question 3: What is the estimated dollar value anticipated to be enrolled by Program staffing in each fiscal year through processing supplemental assessments?</p>	<p>Answer to Question 3:</p> <table data-bbox="653 589 898 654"> <tr> <td>2014-2015</td> <td>\$60,000,000</td> </tr> <tr> <td>2015-2016</td> <td>\$60,000,000</td> </tr> <tr> <td>2016-2017</td> <td>\$60,000,000</td> </tr> </table>	2014-2015	\$60,000,000	2015-2016	\$60,000,000	2016-2017	\$60,000,000
2014-2015	\$60,000,000						
2015-2016	\$60,000,000						
2016-2017	\$60,000,000						
<p>Question 4: What is the estimated backlog of processing supplemental assessments?</p>	<p>Answer to Question 4: The backlog of supplemental assessments is estimated at 450.</p>						
<p>Question 5: What is the estimated rate at which the Program staffing will reduce this backlog?</p>	<p>Answer to Question 5: We anticipate eliminating this backlog in its entirety within 2 years</p>						
<p>If applicable: If your county plans to use Program funds to procure information technology (IT) resources to aid in this activity, describe the IT system and the benefits it will provide, including the estimated change in assessed valuation that it will change to the roll in each fiscal year.</p>	<p>IT System: N/A</p>						
<p>Please provide any additional pertinent information the Department of Finance should consider regarding this particular activity as it relates to your county .</p>	<p>Additional Information: Due to current staffing shortfalls, the Monterey County Assessor Administrative/Management staff have been working out of class while performing the duties of line appraisers to perform these assessment/valuation duties. These management staff members are no longer able to perform these functions due to pressing issues and have otherwise postponed critical administrative obligations. Therefore, the additional staff funded by this grant are necessary to both backfill for the tasks that can no longer be performed by management, as well as address the existing backlog associated with these assessments/valuations. In addition, these new staff members can also fill a need for new skilled technicians who are specialists in the use of GIS as a discovery tool, which is critical in this, a predominantly rural county.</p>						

Discovering, Assessing, and Enrolling Existing Property that has been Modified

<p>Question 1: How many new staff do you anticipate funding for this activity using Program funds? Alternatively, if your office does not plan to add new staff, but instead plans to use Program funds in some other way that will supplement instead of supplant existing staff resources for this activity, please explain how that will be done.</p>	<p>Answer to Question 1: : We plan to use the funding to hire a total of FOUR (4) new appraisers combined for all aspects of this grant. All appraisers will work on property modifications due to construction/remodel and annual Prop 8 review for lien date valuation.</p>						
<p>Question 2: What was the dollar value enrolled by existing staff in 2013/14 through discovering, assessing and enrolling existing real property that has been modified in a way that changes its current assessed value?</p>	<p>Answer to Question 2: \$1,777,891,597</p>						
<p>Question 3: What is the estimated dollar value anticipated to be enrolled by Program staffing in each fiscal year through discovering, assessing and enrolling existing real property that has been modified in a way that changes its current assessed value?</p>	<p>Answer to Question 3:</p> <table border="0"> <tr> <td>2014-2015</td> <td>\$200,000,000</td> </tr> <tr> <td>2015-2016</td> <td>\$200,000,000</td> </tr> <tr> <td>2016-2017</td> <td>\$200,000,000</td> </tr> </table>	2014-2015	\$200,000,000	2015-2016	\$200,000,000	2016-2017	\$200,000,000
2014-2015	\$200,000,000						
2015-2016	\$200,000,000						
2016-2017	\$200,000,000						
<p>Question 4: What is the estimated backlog of real property reassessments?</p>	<p>Answer to Question 4: 25,000 Prop 8 Properties</p>						
<p>Question 5: What is the estimated rate at which the Program staffing will reduce this backlog?</p>	<p>Answer to Question 5: We estimate that for the first two years we will eliminate 8,000 Prop 8 properties and the balance will be eliminated in the third year.</p>						
<p>If applicable: If your county plans to use Program funds to procure information technology (IT) resources to aid in this activity, describe the IT system and the benefits it will provide, including the estimated change in assessed valuation that it will change to the roll in each fiscal year.</p>	<p>IT System: N/A</p>						
<p>Please provide any additional pertinent information the Department of Finance should consider regarding this particular activity as it relates to your county .</p>	<p>Additional Information: Due to current staffing shortfalls, the Monterey County Assessor Administrative/Management staff have been working out of class while performing the duties of line appraisers to perform these assessment/valuation duties. These management staff members are no longer able to perform these functions due to pressing and otherwise have postponed critical administrative obligations. Therefore, the additional staff funded by this grant are necessary to both backfill for the tasks that can no longer be performed by management, as well as address the existing backlog associated with these assessments/valuations. In addition, these new staff members can also fill a need for new skilled technicians who are specialists in the use of GIS as a discovery tool, which is critical in this, a predominantly rural county.</p>						

Discovering, Assessing, and Enrolling Real and Personal Property that has Escaped Assessment

<p>Question 1: How many new staff do you anticipate funding for this activity using Program funds? Alternatively, if your office does not plan to add new staff, but instead plans to use Program funds in some other way that will supplement instead of supplant existing staff resources for this activity, please explain how that will be done.</p>	<p>Answer to Question 1: : We plan to use the funding to hire a total of FOUR (4) new appraisers combined for all aspects of this grant. All appraisers will work on new construction or remodels, appraisals due to changes of ownerships, and valuation of properties that have not been previously discovered or disclosed.</p>						
<p>Question 2: What was the dollar value enrolled by existing staff in 2013/14 through discovering, assessing and enrolling real and personal property that had escaped assessment?</p>	<p>Answer to Question 2: \$335,000,000</p>						
<p>Question 3: What is the estimated dollar value anticipated to be enrolled by Program staffing in each fiscal year through discovering, assessing and enrolling real and personal property that had escaped assessment?</p>	<p>Answer to Question 3:</p> <table> <tr> <td>2014-2015</td> <td>\$35,000,000</td> </tr> <tr> <td>2015-2016</td> <td>\$35,000,000</td> </tr> <tr> <td>2016-2017</td> <td>\$35,000,000</td> </tr> </table>	2014-2015	\$35,000,000	2015-2016	\$35,000,000	2016-2017	\$35,000,000
2014-2015	\$35,000,000						
2015-2016	\$35,000,000						
2016-2017	\$35,000,000						
<p>Question 4: What is the estimated backlog of assessing real and personal property that has escaped assessment?</p>	<p>Answer to Question 4: The backlog of real and personal property escaping assessment is estimated at 2,000 annually.</p>						
<p>Question 5: What is the estimated rate at which the Program staffing will reduce this backlog?</p>	<p>Answer to Question 5: Additional Program staffing is estimated to reduce this in two years.</p>						
<p>If applicable: If your county plans to use Program funds to procure information technology (IT) resources to aid in this activity, describe the IT system and the benefits it will provide, including the estimated change in assessed valuation that it will change to the roll in each fiscal year.</p>	<p>IT System:</p>						
<p>Please provide any additional pertinent information the Department of Finance should consider regarding this particular activity as it relates to your county .</p>	<p>Additional Information: Due to current staffing shortfalls, the Monterey County Assessor Administrative/Management staff have been working out of class while performing the duties of line appraisers to perform these assessment/valuation duties. These management staff members are no longer able to perform these functions due to pressing and have otherwise postponed critical administrative obligations. Therefore, the additional staff funded by this grant are necessary to both backfill for the tasks that can no longer be performed by management, as well as address the existing backlog associated with these assessments/valuations. In addition, these new staff members can also fill a need for new skilled technicians who are specialists in the use of GIS as a discovery tool, which is critical in this, a predominantly rural county.</p>						

Discovering, Assessing, and Enrolling Previously Reduced Valuation

<p>Question 1: How many new staff do you anticipate funding for this activity using Program funds? Alternatively, if your office does not plan to add new staff, but instead plans to use Program funds in some other way that will supplement instead of supplant existing staff resources for this activity, please explain how that will be done.</p>	<p>Answer to Question 1: : We plan to use the funding to hire a total of FOUR (4) new appraisers combined for all aspects of this grant. All appraisers will work on reviewing appraisals for changes of valuation on properties that have been previously lowered under Proposition 8 or otherwise.</p>						
<p>Question 2: What was the dollar value enrolled by existing staff in 2013/14 through discovering, assessing and enrolling the assessed value of properties that were previously reduced pursuant to Proposition 8?</p>	<p>Answer to Question 2: \$1,777,891,597</p>						
<p>Question 3: What is the estimated dollar value anticipated to be enrolled by Program staffing in each fiscal year through discovering, assessing and enrolling newly constructed property?</p>	<p>Answer to Question 3:</p> <table border="0"> <tr> <td>2014-2015</td> <td>\$200,000,000</td> </tr> <tr> <td>2015-2016</td> <td>\$200,000,000</td> </tr> <tr> <td>2016-2017</td> <td>\$200,000,000</td> </tr> </table>	2014-2015	\$200,000,000	2015-2016	\$200,000,000	2016-2017	\$200,000,000
2014-2015	\$200,000,000						
2015-2016	\$200,000,000						
2016-2017	\$200,000,000						
<p>Question 4: What is the estimated backlog of Proposition 8 reassessments?</p>	<p>Answer to Question 4: 25,000 Prop 8 Properties</p>						
<p>Question 5: What is the estimated rate at which the Program staffing will reduce this backlog?</p>	<p>Answer to Question 5: We estimate that for the first two years we will eliminate 8,000 Prop 8 properties and the balance will be eliminated in the third year.</p>						
<p>If applicable: If your county plans to use Program funds to procure information technology (IT) resources to aid in this activity, describe the IT system and the benefits it will provide, including the estimated change in assessed valuation that it will change to the roll in each fiscal year.</p>	<p>IT System: N/A</p>						
<p>Please provide any additional pertinent information the Department of Finance should consider regarding this particular activity as it relates to your county .</p>	<p>Additional Information: Due to current staffing shortfalls, the Monterey County Assessor Administrative/Management staff have been working out of class while performing the duties of line appraisers to perform these assessment/valuation duties. These management staff members are no longer able to perform these functions due to pressing and otherwise postponed critical administrative obligations. Therefore, the additional staff funded by this grant are necessary to both backfill for the tasks that can no longer be performed by management, as well as address the existing backlog associated with these assessments/valuations. In addition, these new staff members can also fill a need for new skilled technicians who are specialists in the use of GIS as a discovery tool, which is critical in this, a predominantly rural county.</p>						

Responding to Assessment Appeals

Question 1: What is the dollar value retained on the roll by existing staff in 2013/14 by responding to assessment appeals?	Answer to Question 1: The value retained on the roll by the existing staff in 2013-2014 by responding to assessment appeals was \$320,945,577.
Question 2: What is the expected amount of assessed values that will be retained on the roll by the new Program staff in each fiscal year?	Answer to Question 2: Based upon the 2013-2014 fiscal year, new Program staff can be counted on to retain an estimated \$20,000,000 of value each fiscal year per appraiser for a total of \$80,000,000.
Question 3: What is the estimated number of appeals that were not responded to in 2013/14 due to staffing deficiencies, and was the resultant loss in assessed value on the roll?	Answer to Question 3: The Monterey County Assessor's Office did not sustain a loss in value due to applications for assessment appeals not heard within the two year Statute of Limitations. All matters were heard timely.
Question 4: What is the estimated number of assessment appeals to which the Program staff will respond in each fiscal year?	Answer to Question 4: Staff will respond to an average of 32 applications in each fiscal year.
If applicable: If your county plans to use Program funds to procure information technology (IT) resources to aid in this activity, describe the IT system and the benefits it will provide, including the estimated change in assessed valuation that it will change to the roll in each fiscal year.	IT System: N/A
Please provide any additional pertinent information the Department of Finance should consider regarding this particular activity as it relates to your county .	Additional Information: Application for Changed Assessment are filed on an annual basis as a result of a change of ownership or new construction in additon to those filed on the Regular Assessment Roll. Whereas the Assessor has a two year window to reconcile, we typically review and reach a conclusion within eighteen (18) months. Additional Program staffing will decrease the workload from current staff and will further facilitate developing a higher level of customer service by responding to Assessment Appeals more efficiently.

Conducting Property Tax Audits

<p>Question 1: How many new staff do you anticipate funding for this activity using Program funds? Alternatively, if your office does not plan to add new staff, but instead plans to use Program funds in some other way that will supplement instead of supplant existing staff resources for this activity, please explain how that will be done.</p>	<p>Answer to Question 1: Funds will not be utilized for Tax Auditor position activities, as no new staff are proposed.</p>						
<p>Question 2: What was the dollar value enrolled by existing staff in 2013/14 through conducting property tax audits?</p>	<p>Answer to Question 2: \$35,487,322</p>						
<p>Question 3: What is the estimated dollar value anticipated to be enrolled by Program staffing in each fiscal year through conducting property tax audits?</p>	<p>Answer to Question 3:</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">2014-2015</td> <td>\$35,000,000</td> </tr> <tr> <td>2015-2016</td> <td>\$35,000,000</td> </tr> <tr> <td>2016-2017</td> <td>\$35,000,000</td> </tr> </table>	2014-2015	\$35,000,000	2015-2016	\$35,000,000	2016-2017	\$35,000,000
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2015-2016	\$35,000,000						
2016-2017	\$35,000,000						
<p>Question 4: What is the estimated backlog of property tax audits?</p>	<p>Answer to Question 4: There is no backlog of property tax audits since the number of mandated mandatory audits was reduced.</p>						
<p>Question 5: What is the estimated rate at which the Program staffing will reduce this backlog?</p>	<p>Answer to Question 5:</p> <p>N/A</p>						
<p>If applicable: If your county plans to use Program funds to procure information technology (IT) resources to aid in this activity, describe the IT system and the benefits it will provide, including the estimated change in assessed valuation that it will change to the roll in each fiscal year.</p>	<p>IT System: N/A</p>						
<p>Please provide any additional pertinent information the Department of Finance should consider regarding this particular activity as it relates to your county .</p>	<p>Additional Information: N/A</p>						