

State Supplementation for County Assessors' Program

- Application Form -

Submitted by County of: Monterey

Contact Person: Corina Morgan
Email Address: MorganCM1@co.monterey.ca.us
Telephone Number: 831-755-5821

Please submit applications to the following email address **no later than September 1, 2018:**

SSCAPROGRAM@DOF.CA.GOV

Funding Requested, Assessed Values, and Staffing Levels

- Please Use Whole Numbers for Dollar Amounts -

1	Program funds requested per fiscal year (maximum of \$750,000 per fiscal year):	\$	170,000	2018-19
		\$	170,000	2019-20
		\$	170,000	2020-21
2	Number of budgeted, permanent positions in Fiscal Year 2017-18, as will be reported to the Board of Equalization (BOE) for its report titled "A Report on Budgets, Workloads, and Assessment Appeals Activities in California Assessors' Offices" (hereafter referred to as the Report):		50	
3	Total assessed value of county-assessed property in 2017-18:		\$68,885,665,944	
4	Number of new staff the Assessor's Office will add using Program funds and county matching funds:		2	
5	The amount of Program funds and county matching funds that will be used to provide office space and supplies for the staff identified in Question 4 above.	\$	59,052	

New Construction

- Please Use Whole Numbers for Dollar Amounts -

6	The total value added to the property tax roll in 2017-18 through the assessment and enrollment of newly constructed property, as will be reported to the BOE for the Report:	\$257,126,582	
7	The number of new construction assessments completed in 2017-18 as will be reported to the BOE for the Report:	650	
8	The number of new construction assessments the Assessor's Office expects the staff identified in Question 4 on Tab 1 to complete in each fiscal year:	75	2018-19
		75	2019-20
		75	2020-21
9	Estimated value, by fiscal year, that the staff identified in Question 4 on Tab 1 will add to the property tax roll by assessing newly constructed property	\$30,000,000	2018-19
		\$30,000,000	2019-20
		\$30,000,000	2020-21

Changes in Ownership

- Please Use Whole Numbers for Dollar Amounts -

10	The total value added to the property tax roll in 2017-18 through the assessment of real property that has changed ownership:	\$1,863,529,765	
11	The number of change-in-ownership assessments completed in 2017-18:	8259	
12	The number of change-in-ownership assessments the Assessor's Office expects the staff identified in Question 4 on Tab 1 to complete in each fiscal year:	500	2018-19
		500	2019-20
		500	2020-21
13	Estimated value, by fiscal year, that the staff identified in Question 4 on Tab 1 will add to the property tax roll through change-in-ownership assessments:	\$125,000,000	2018-19
		\$125,000,000	2019-20
		\$125,000,000	2020-21

Supplemental Assessments

- Please Use Whole Numbers for Dollar Amounts -

14	The total value added to the property tax roll in 2017-18 through supplemental assessments:	\$2,123,249,340	
15	The number of supplemental assessments completed in 2017-18:	8922	
16	The number of supplemental assessments the Assessor's Office expects the staff identified in Question 4 on Tab 1 to complete in each fiscal year:	575	2018-19
		575	2019-20
		575	2020-21
17	Estimated value, by fiscal year, that the staff identified in Question 4 on Tab 1 will add to the property tax roll through supplemental assessments:	\$155,000,000	2018-19
		\$155,000,000	2019-20
		\$155,000,000	2020-21

Property Modifications

- Please Use Whole Numbers for Dollar Amounts -

18	The total value added to the property tax roll in 2017-18 through reassessing modified real property:	\$111,000,000	
19	The number of modified real property reassessments completed in 2017-18:	500	
20	The number of modified real property reassessments the Assessor's Office expects the staff identified in Question 4 on Tab 1 to complete in each fiscal year:	50	2018-19
		50	2019-20
		50	2020-21
21	Estimated value, by fiscal year, that the staff identified in Question 4 on Tab 1 will add to the property tax roll by reassessing modified real property:	\$111,000,000	2018-19
		\$111,000,000	2019-20
		\$111,000,000	2020-21

Escaped Assessments

- Please Use Whole Numbers for Dollar Amounts -

22	The total value added to the property tax roll in 2017-18 through assessing property that previously escaped	\$15,000,000.0	
23	The number of escaped assessments completed in 2017-18:	279	
24	The number of escaped assessments the Assessor's Office expects the staff identified in Question 4 on Tab 1 to complete in each fiscal year:	0	2018-19
		0	2019-20
		0	2020-21
25	Estimated value, by fiscal year, that the staff identified in Question 4 on Tab 1 will add to the property tax roll by assessing property that previously escaped assessment:	0	2018-19
		0	2019-20
		0	2020-21

Proposition 8 Reassessments

- Please Use Whole Numbers for Dollar Amounts -

26	The total value added to the property tax roll in 2017-18 through reassessing property that was reduced in value under Proposition 8:	\$479,146,617.00	
27	The number of Proposition 8 reassessments completed in 2017-18:	10,017	
28	The number of Proposition 8 reassessments the Assessor's Office expects the staff identified in Question 4 on Tab 1 to complete in each fiscal year:	800	2018-19
		700	2019-20
		600	2020-21
29	Estimated value, by fiscal year, that the staff identified in Question 4 on Tab 1 will add to the property tax roll through Proposition 8 reassessments:	\$36,000,000	2018-19
		\$28,000,000	2019-20
		\$21,000,000	2020-21

Discovering Unassessed Property

- Please Use Whole Numbers for Dollar Amounts -

30	The total value added to the property tax roll in 2017-18 by discovering and assessing unassessed property:	0	
31	The number of assessments of discovered property completed in 2017-18:	0	
32	The number of discovered property assessments the Assessor's Office expects the staff identified in Question 4 on Tab 1 to complete in each fiscal year:	50	2018-19
		50	2019-20
		50	2020-21
33	Estimated value, by fiscal year, that the staff identified in Question 4 on Tab 1 will add to the property tax roll by discovering and assessing unassessed property:	\$5,000,000	2018-19
		\$5,000,000	2019-20
		\$5,000,000	2020-21

Assessment Appeals

- Please Use Whole Numbers for Dollar Amounts -

34	The total value added to the property tax roll in 2017-18 by resolving assessment appeals:	0	* See below
35	The number of assessment appeals resolved by Assessor's office staff in 2017-18, as will be reported to the BOE for the Report:	504	
36	The number of assessment appeals the Assessor's Office expects the staff identified in Question 4 on Tab 1 to resolve in each fiscal year:	0	2018-19
		0	2019-20
		0	2020-21
37	Estimated value, by fiscal year, that the staff identified in Question 4 on Tab 1 will add to the property tax roll by resolving assessment appeals:	0	2018-19
		0	2019-20
		0	2020-21

*Whereas no value was added - substantial value was upheld

Property Tax Audits

- Please Use Whole Numbers for Dollar Amounts -

38	The total value added to the property tax roll in 2017-18 by completing property tax audits:	\$36,456,548	
39	The number of property tax audits completed by Assessor's office staff in 2017-18:	73	
40	The number of property tax audits the Assessor's Office expects the staff identified in Question 4 on Tab 1 to complete in each fiscal year:	0	2018-19
		0	2019-20
		0	2020-21
41	Estimated value, by fiscal year, that the staff identified in Question 4 on Tab 1 will add to the property tax roll by completing property tax audits:	0	2018-19
		0	2019-20
		0	2020-21

Information Technology System Improvements

- Please Use Whole Numbers for Dollar Amounts -

42 Identify, by fiscal year, the number of assessment tasks expected to be completed using Program-funded information technology systems and software, and the estimated dollar value added to the property tax roll:

		Number of assessment tasks:		Value added to the roll:	
a	New Construction:	0	2018-19	0	2018-19
		0	2019-20	0	2019-20
		0	2020-21	0	2020-21
b	Changes in Ownership:	0	2018-19	0	2018-19
		0	2019-20	0	2019-20
		0	2020-21	0	2020-21
c	Supplemental Assessments:	0	2018-19	0	2018-19
		0	2019-20	0	2019-20
		0	2020-21	0	2020-21
d	Modified Real Property Assessments:	0	2018-19	0	2018-19
		0	2019-20	0	2019-20
		0	2020-21	0	2020-21

e	Escaped Assessments:	0	2018-19	0	2018-19
		0	2019-20	0	2019-20
		0	2020-21	0	2020-21
f	Prop 8 Reassessments:	800	2018-19	40,000,000	2018-19
		800	2019-20	40,000,000	2019-20
		800	2020-21	40,000,000	2020-21
g	Discovering Unassessed Property:	_____	2018-19	_____	2018-19
		_____	2019-20	_____	2019-20
		_____	2020-21	_____	2020-21

43 Provide a brief narrative description of how the IT system and software will increase functionality, staff productivity, and assessed valuation. Expand the text box if necessary:

AES Software reduces the time Appraiser's spend performing manual restoration and/or reductions of value on the existing 7,000 Prop 8 properties. This software allows the Appraiser to focus on processing reappraisal work.