

## Attachment E. Assessor Fee Study (Monterey County)

Fee Study for Assessor/ Budget Unit 118			
September 2023			
General Employees			
Position	Annual Salary at Step 7	Benefit Package Average 50%	Total Cost
Admin Secretary-Confidential	\$77,700.00	\$38,850.00	\$116,550.00
Appraiser I-II*	\$90,960.00	\$45,480.00	\$136,440.00
Appraiser III	\$101,508.00	\$50,754.00	\$152,262.00
Auditor Appraiser I-II*	\$92,976.00	\$46,488.00	\$139,464.00
Auditor Appraiser III	\$112,752.00	\$56,376.00	\$169,128.00
BTA I	\$98,772.00	\$49,386.00	\$148,158.00
Office Assistant II	\$56,304.00	\$28,152.00	\$84,456.00
Office Assistant III	\$61,608.00	\$30,804.00	\$92,412.00
Property Transfer Clerk	\$67,524.00	\$33,762.00	\$101,286.00
Senior Map Drafting Tech	\$76,308.00	\$38,154.00	\$114,462.00
Senior Property Transfer Clerk	\$74,628.00	\$37,314.00	\$111,942.00
* Calculated at II level			

Management			
Position	Annual Salary at Step 7	Benefit Package Average 50%	Total Cost
Administrative Services Asst.	\$96,660.00	\$48,330.00	\$144,990.00
Assessor-County Clerk-Recorder	\$245,028.00	\$122,514.00	\$367,542.00
Assistant Assessor - Valuation	\$166,116.00	\$83,058.00	\$249,174.00
Auditor-Appraiser Manager	\$137,592.00	\$68,796.00	\$206,388.00
DISM II	\$144,840.00	\$72,420.00	\$217,260.00
Supervising Appraiser	\$126,684.00	\$63,342.00	\$190,026.00
Supervising Office Assistant I	\$76,548.00	\$38,274.00	\$114,822.00

Assessor - Additional Costs (FY 2022-2023)				
Dept Overhead	\$373,717.63	49 budgeted positions	Per Employee	\$7,626.89
Total Services and Supplies	\$747,830.00	49 budgeted positions	Per Employee	\$15,261.84

<b>EE Cost + Overhead and Services/Supplies</b>	
Admin Secretary-Confidential	<b>\$139,438.73</b>
Administrative Services Asst.	<b>\$167,878.73</b>
Appraiser I-II	<b>\$159,328.73</b>
Appraiser III	<b>\$175,150.73</b>
Assessor-County Clerk-Recorder	<b>\$390,430.73</b>
Assistant Assessor - Valuation	<b>\$272,062.73</b>
Auditor Appraiser I-II	<b>\$162,352.73</b>
Auditor Appraiser III	<b>\$192,016.73</b>
Auditor Appraiser Manager	<b>\$229,276.73</b>
BTA I	<b>\$171,046.73</b>
DISM II	<b>\$240,148.73</b>
Office Assistant II	<b>\$107,344.73</b>
Office Assistant III	<b>\$115,300.73</b>
Property Transfer Clerk	<b>\$124,174.73</b>
Senior Map Drafting Tech	<b>\$137,350.73</b>
Senior Property Transfer Clerk	<b>\$134,830.73</b>
Supervising Appraiser	<b>\$212,914.73</b>
Supervising Office Assistant I	<b>\$137,710.73</b>

<b>Employee Cost in Minute Increments (by Position)</b>				
Total Employee cost / productive minutes		Per 1/4 hour	Per 1/2 hour	Per hour
Admin Secretary-Confidential	<b>\$1.44</b>	\$21.63	\$43.25	\$86.51
Administrative Services Asst.	<b>\$1.72</b>	\$25.86	\$51.72	\$103.45
Appraiser I-II	<b>\$1.62</b>	\$24.28	\$48.56	\$97.12
Appraiser III	<b>\$1.80</b>	\$27.00	\$54.00	\$108.01
Assessor-County Clerk-Recorder	<b>\$4.44</b>	\$66.55	\$133.10	\$266.20
Asst. Assessor - Valuation	<b>\$2.88</b>	\$43.24	\$86.48	\$172.96
Auditor Appraiser I-II	<b>\$1.68</b>	\$25.15	\$50.30	\$100.60
Auditor Appraiser III	<b>\$1.99</b>	\$29.79	\$59.57	\$119.15
Auditor Appraiser Manager	<b>\$2.43</b>	\$36.44	\$72.88	\$145.76
BTA I	<b>\$1.74</b>	\$26.17	\$52.33	\$104.66
DISM II	<b>\$2.48</b>	\$37.25	\$74.51	\$149.01
Office Assistant II	<b>\$1.09</b>	\$16.33	\$32.66	\$65.32
Office Assistant III	<b>\$1.19</b>	\$17.86	\$35.72	\$71.44
Property Transfer Clerk	<b>\$1.28</b>	\$19.23	\$38.46	\$76.92
Senior Map Drafting Tech	<b>\$1.44</b>	\$21.55	\$43.10	\$86.19
Senior Property Transfer Clerk	<b>\$1.44</b>	\$21.58	\$43.17	\$86.33
Supervising Appraiser	<b>\$2.25</b>	\$33.80	\$67.61	\$135.22
Supervising Office Assistant I	<b>\$1.47</b>	\$22.07	\$44.14	\$88.28

## Proposed Fees

Task	Estimated Average # of Min	Fee Per Task	Proposed Fee (As of 1/1/2024)		% Cost Recovery	Current Fee (As of 1/1/2018)	
<b>Request for Property Characteristics</b>							
Residential/Commercial	20	\$22.79	\$20.00	Per Parcel	88%	\$15.00	Per Parcel
Agricultural			\$120.00	Per Parcel		\$60.00	Per Parcel
Greenhouse			\$120.00	Per Parcel		\$60.00	Per Parcel
<b>Splits and Combinations</b>			\$125.00	Per Request		\$75.00	Per Request
<b>Lot Line Adjustments</b>			\$125.00	Per Request		\$75.00	Per Request
<b>Tax Clearance Estimates</b>	90	\$155.17	\$150.00	Per Parcel	97%	\$52.00	Per Parcel

Task	Proposed Fee (As of 1/1/2024)		Current Fee (As of 1/1/2018)	
Beneficial Ownership Statement request	\$100.00	Per Request	\$50.00	Per Request
Beneficial Ownership request late filing (30 days)	\$150.00	Per Request	\$100.00	Per Request
Affidavit of Entity Transfer request	\$100.00	Per Request	\$50.00	Per Request
Affidavit of Entity Transfer late filing (30 days)	\$150.00	Per Request	\$100.00	Per Request

  Plus additional research fee per 1/2 hour for more complex cases (1/2 hour minimum)

Research Fee Calculation				
	Per Min	1/4 hour	1/2 hour	Per hour
Assessor*	\$1.88	\$28.15	\$56.30	\$112.60
Proposed		\$27.50	\$55.00	\$110.00
IT	\$2.38	\$35.73	\$71.45	\$142.91
Proposed		\$35.00	\$70.00	\$140.00
*Not including IT				

MONTEREY COUNTY ASSESSOR'S OFFICE  
FEE STUDY  
September 2023

Tasks and Subtasks Worksheet  
Estimate time to the closest minute.

Proposed Fee: Property Characteristic Request - Agricultural

Item No.	Task/Actions	Estimated Time (in minutes)
	<b>Appraisal Support</b>	<b>1-5 min</b>
1.	Request Rcvd' by Email with payment – Forward to Ag Appraiser	1 min
	Request Rcvd' over Counter with payment – Create a receipt – Walk to Appraiser	5 min
	<b>Agricultural Appraiser</b>	<b>88 min</b>
2.	Review request	10 min
3.	Pull hard copy/pull electronic copy	13 min
4.	Forensic analysis/record review and reconciliation	40 min
5.	Preparation of report	15 min
6.	Submission/email/mail	10 min
	<b>Appraisal Support</b>	<b>1-3 min</b>
7.	Characteristics Rcvd' from Appraiser email to requestor	1 min
	Characteristics Rcvd' from Appraiser to requestor at counter	3 min
	Total time	90-96 min (1 hour, 30-36 min)

Comprised by: Assessor, Assistant-Assessor Valuation, Supervising OA I, MAI

Date: 9/14/2023

MONTEREY COUNTY ASSESSOR'S OFFICE  
FEE STUDY  
September 2023

Tasks and Subtasks Worksheet  
Estimate time to the closest minute.

Proposed Fee: Property Characteristic Request – Greenhouse/Nursery
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Item No.	Task/Actions	Estimated Time (in minutes)
	<b>Appraisal Support</b>	<b>1-5 min</b>
1.	Request Rcvd' by Email with payment – Forward to Ag Appraiser	1 min
	Request Rcvd' over Counter with payment - Create a receipt – Walk to Appraiser	5 min
	<b>Agricultural Appraiser</b>	<b>148 min</b>
2.	Review request	10 min
3.	Pull hard copy/pull electronic copy	13 min
4.	Forensic analysis/record review and reconciliation	85 min
5.	Preparation of report	30 min
6.	Submission/email/mail	10 min
	<b>Appraisal Support</b>	<b>1-3 min</b>
7.	Characteristics Rcvd' from Appraiser email to requestor	1 min
	Characteristics Rcvd' from Appraiser to requestor at counter	3 min
	Total time	150-156 min (2 hours, 30-36 min)

Comprised by: Assessor, Assistant Assessor-Valuation, Supervising OA I, MA I
Date: 9/14/2023

MONTEREY COUNTY ASSESSOR'S OFFICE  
FEE STUDY  
September 2023

Tasks and Subtasks Worksheet  
Estimate time to the closest minute.

Proposed Fee: Splits and Combinations

Item No.	Task/Actions	Estimated Time (in minutes)
	<b>Mapping</b>	<b>180 min (Basic) 300 min (Advanced)</b>
1.	Preliminary Check (Agp, Ownership, Tra)	30 min
2.	Preform LLA (Basic)	60 min to 120 min
	Preform LLA (Advanced)	120 min to 720 min approx.
3.	Calculate Acreages (Basic)	60 min to 120 min
	Calculate Acreages (Advanced)	120 min to 720 min
4.	Check Paperwork for Accuracy	15 min to 30 min
5.	Prepare for Distribution.	15 min to 30 min
	<b>Property Transfer</b>	<b>40 min</b>
6.	Reviewed the split that was received	3 min
7.	Verify if the taxes are current	1 min
8.	Notate notes on the old parcels	2 min
9.	Inactivate old parcel numbers in the ASO490 screen	2 min
10.	Create new parcel numbers and key in parcel number, status, event date, document code, taxability code, tra code, comments, acres, ownership names, address, legal description, notate the note field	11 min
11.	Verify the 100 megabyte to make sure everything went through the system correctly(ownership, address, legal description, APR screen)	3 min
12.	Key the old parcels & new parcels in the assessment tracking screen ASO970 . Key in document number, date parcels	5 min
13.	Notify appraiser of new parcel #	1 min
14.	Sent letter out to owners	5 min
15.	Scan letter on all parcels & save	2 min
16.	Scan write-up on all new parcels	5 min
	<b>Real Property</b>	<b>50-60 min</b>
17.	Receive and review documentation from Transfer	10 min

18.	Open Megabyte program to “mother parcel” file	2 min
19.	Develop calculations to split value to new parcels (more time needed if improvements are present)	13-18 min
20.	Open files for “daughter parcels” and input values	10 min
21.	Verify values and update “trending” if necessary (window period events require more time)	5-10 min
22.	Place notes in all “mother” & “daughter” files	5 min
23.	Enroll and verify all values for each parcel	5 min
	<b>Total time</b>	<b>Basic</b> 270 min (4 hours, 30 min)  <b>Advanced</b> 390 min (6 hours, 30 min)

Comprised by: Supv. Appraiser, MAI, Sr. Map Drafting Tech, Sr. Prop Transfer Clerk

Date: 9/14/23

MONTEREY COUNTY ASSESSOR'S OFFICE  
FEE STUDY  
September 2023

Tasks and Subtasks Worksheet  
Estimate time to the closest minute.

Proposed Fee: Lot Line Adjustments

Item No.	Task/Actions	Estimated Time (in minutes)
	<b>Mapping</b>	<b>180 min (Basic) 300 min (Advanced)</b>
1.	Preliminary Check (Agp, Ownership, Tra)	30 min
2.	Preform LLA (Basic)	60 min to 120 min
	Preform LLA (Advanced)	120 min to 720 min approx..
3.	Calculate Acreages (Basic)	60 min to 120 min
	Calculate Acreages (Advanced)	120 min to 720 min
4.	Check Paperwork for Accuracy	15 min to 30 min
5.	Prepare for Distribution.	15 min to 30 min
	<b>Property Transfer</b>	<b>16 min</b>
6.	Reviewed the split that was received	2 min
7.	Made sure the ownership matched the document	1 min
8.	Create the new parcel number and key in the owner's name, key in legal description and add notes	7 min
9.	Verify that the information was keyed in correctly	2 min
10.	E-mail the appraiser with the new parcel number	1 min
11.	Scan the info sheet into the megabyte system	2 min
12.	File map with write-up in file cabinet	1 min
	<b>Real Property</b>	<b>50-60 min</b>
13.	Receive and review documentation from Transfer	10 min
14.	Open Megabyte program to "mother parcel" file	2 min
15.	Develop calculations to split value to new parcels (more time needed if improvements are present)	13-18 min
16.	Open files for "daughter parcels" and input values	10 min
17.	Verify values and update "trending" if necessary (window period events require more time)	5-10 min
18.	Place notes in all "mother" & "daughter" files	5 min
19.	Enroll and verify all values for each parcel	5 min



	<b>Total time</b>	<b>Basic</b> 246 min (4 hours, 6 min)  <b>Advanced</b> 366 min (6 hours, 6 min)
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Comprised by: Supv. Appraiser, MAI, Sr. Map Drafting Tech, Sr. Prop Transfer Clerk
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Date: 9/14/23
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