



# Assessor 2019/2020 Budget Overview

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Karl Weiland

El Dorado County Assessor

# Property Tax Administration

In California, Property Tax Administration is a County responsibility. The Assessor, along with the Auditor/Controller and the Treasurer/Tax Collector, share this responsibility:

**The Assessor** - 1) maintains the inventory of all assessable property in the county, 2) appraises and values property and 3) prepares the various assessment rolls and turns them over to the Auditor.

**The Auditor** - 1) determines the property tax rates, 2) applies the rates to the value of each property, 3) adds any special assessment charges and turns the extended roll over to the Tax Collector . Also apportions property taxes to all agencies.

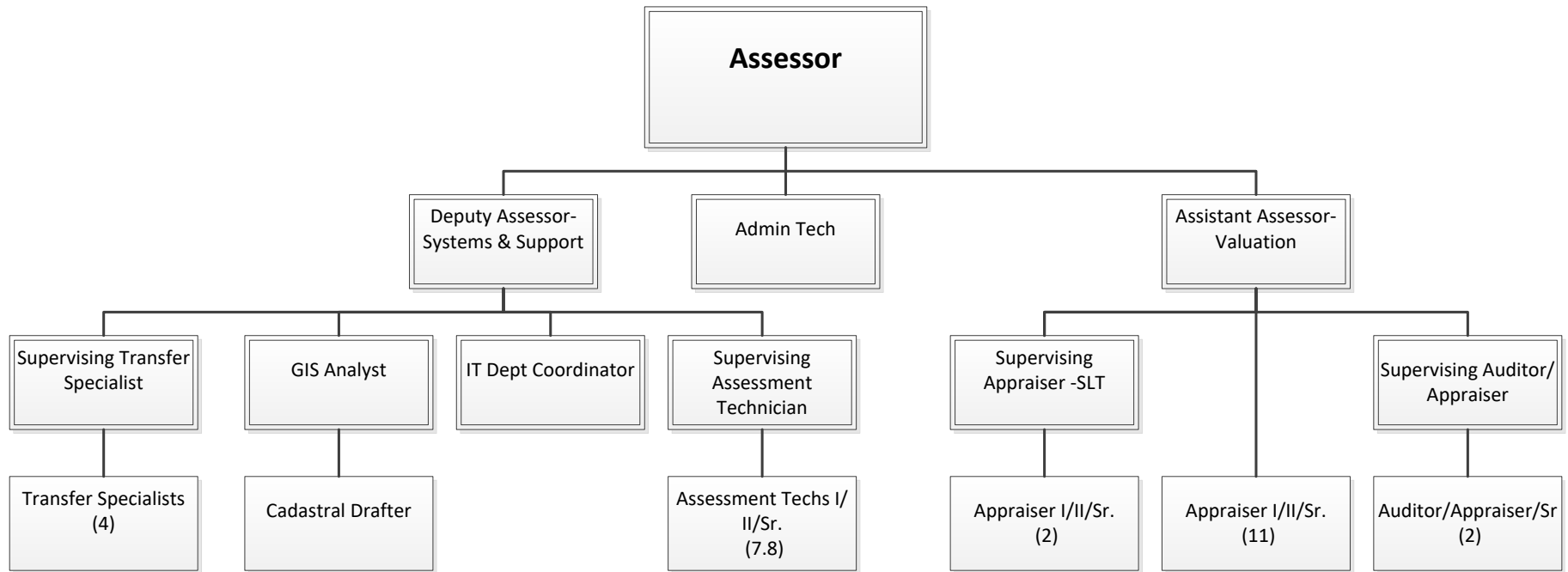
**The Tax Collector** - 1) prints and mails the tax bills 2) deposits and processes the payments, 3) pursues payment of delinquent bills and sells defaulted property at auction.

# El Dorado County Assessor

## *Mission*

- The Assessor is responsible for discovering, inventorying, valuing and assessing all taxable real property in the County, including residential, commercial, industrial properties and undeveloped land. The office is also responsible for assessing taxable business property, boats, airplanes, mining claims and other assessable interests in property.
- The Assessor prepares and maintains the master property records and parcel maps.
- The office is charged with the administration of a number of exemption programs benefitting homeowners and certain qualifying organizations.
- The Assessor prepares and submits the secured, unsecured, and supplemental assessment rolls for use in preparation of assessments for taxation by the various taxing agencies.

## 2018/2019 Assessors Organization Chart



Total FTE – 37.8

The Assessor maintains an office with five staff in South Lake Tahoe.

# Current Challenges

## Property Tax Administration Replacement Project (PTARP) Implementation

- All three departments are up and running in production. The Assessor is processing the 2019/2020 roll.
- A few minor issues relating to the Assessor data conversion remain under review and correction.
- Property transfers, Appraisals, Supplemental assessments and Roll corrections are in various stages of operation.
- Import/Export and interfaces with the new Recorder system, Trackit and GIS are either complete or awaiting test.
- The biggest challenge for the Assessor staff is developing workflow management procedures to insure the orderly transition into operating the new system. In February we will be meeting with San Joaquin, Nevada and Fresno County Assessor staff to review a workflow management tool developed by San Joaquin County specifically for Megabyte.

# Current Challenges

## PTARP Contract Administration

The contract payments for the license with Megabyte Property Tax Systems are based on phases, or milestone completion.

<b>Contract Cost</b>		\$ 1,078,000
<b>Payments to date</b>		
25% down at signing	(232,000)	
Initial data conversion	(150,000)	
Phase 1 - Design/Setup	(104,400)	
Phase 2 Data Conversion	<u>(208,800)</u>	
<b>Payments to date</b>		<u>(695,200)</u>
Remaining Milestones		
3 - System Testing		\$ 174,000
4 - Training		139,200
5 - Go Live		<u>69,600</u>
<b>Remaining Balance</b>		<u>\$ 382,800</u>

# Current Challenges

## PTARP – After Go Live

- The property tax administration business cycle lasts a full year.
- There will be at least two years of evaluation and discovery before the system can truly be considered stable.
- Beyond then, there will be optional enhancements to review and consider.
- At this point, we would expect to bring initial staffing or operational support realignment considerations forward with the 2020/2021 budget.

# Current Challenges

## South Lake Tahoe Office

- Assessor staff is currently located in the El Dorado Center on Lake Tahoe Blvd.
- This facility is scheduled for demolition and reconstruction with the project tentatively scheduled to begin this spring.
- The temporary relocation of Assessor staff to rented space followed by permanent relocation to the Johnson Center will present logistical and operational challenges.
- We are working closely with Facilities staff to meet these challenges.



Questions ?