

Minimum High Level Management Staffing for a District Office

Working Title	Civil Service Classification	Salary Range		Mid-Salary Level	Yearly Salary
		Low	High		
Administrator	Business Tax Administrator III	7,792	9,292	8,542	102,504
Compliance Principal	Business Tax Administrator II	6,110	7,984	7,047	84,564
Audit Principal	Supervising Tax Auditor III	6,428	8,450	7,439	89,268
LAN Coordinator	Staff Information Systems Analyst (Specialist)	5,295	6,963	6,129	73,548
Executive Assistant	Executive Assistant	3,438	4,303	3,871	46,452
Technical Advisor	Business Taxes Specialist II	5,826	7,660	6,743	80,916
Total		34,889	44,652	39,771	477,252

Minimum High Level Management for a Branch Office

Working Title	Civil Service Classification	Salary Range		Mid-Salary Level	Yearly Salary
		Low	High		
Business Taxes Administrator And/Or	Business Taxes Administrator I	5,307	6,973	6,140	73,680
Supervising Tax Auditor I And/Or	Supervising Tax Auditor I	5,307	6,973	6,140	73,680
Supervising Tax Auditor II	Supervising Tax Auditor II	5,826	7,660	6,743	80,916
Total		5,307	6,973		

Salaries per <http://eboe/eboe3/career/salaries.pdf>

STATE BOARD OF EQUALIZATION



Appeal Name: Establishing locations of offices
 Case ID: Member Harney Exhibit ITEM #. PL1
 Date: 6/19/16 Exhibit No: 6.7

Principal to Supervisor Comparison by District

Equalization District	Office	Administrator	Compliance Principal	Compliance Supervisor	Audit Principal	Audit Supervisor
1	Fresno	1	1	3	1	3
	Sacramento	1	2	7	1	6
	Santa Clarita	1	1	3	1	1
	Rancho Cucamonga	1	1	3	1	1
	Subtotal District 1	4	5	16	4	11
2	San Francisco	1	1	4	1	4
	Oakland	1	1	4	1	6
	San Jose	1	1	5	1	4
	Santa Rosa	1	1	3	1	3
	Subtotal District 2	4	4	16	4	17
3	Norwalk	1	1	7	1	4
	Glendale	1	1	4	1	4
	West Covina	1	1	3	1	4
	Ventura	1	1	3	1	3
	Culver City	1	1	5	1	5
	Subtotal District 3	5	5	22	5	20
4	Irvine	1	2	8	1	8
	Riverside	1	1	5	1	5
	San Diego	1	1	8	1	4
	Subtotal District 4	3	4	21	3	17
In State Total		16	18	75	16	65

Comments	
*	The absolute minimum supervisor to principal ratio should be 3 to 1.
*	The large in-state offices and out of state, have 6-8 teams per principal. The Large team supervisor prepare their supervisors for future management due to the ability to perform higher level tasks.
*	Additional principals in large offices probably work as there can only be one true leader of a department.
*	Could Rancho Cucamonga and Santa Clarita be combined.

Summary of Staffing by Office

Office	Administrator	Compliance Principals	Compliance Supervisors	Compliance Staff	Audit Principals	Audit Supervisors	Audit Staff	Technical Advisor	Secretary	LAN Coordinator (1)	Total Staff	Comments
Culver City	1	1	5	45	1	5	46	1	1	0	106	
Fresno	1	1	3	35	1	2	21	1	1	1	67	Combined staff total of 94
<i>Fresno Branch - Bakersfield</i>	0	0	1	13	0	1	12	0	0	0	27	
Glendale	1	1	4	53	1	4	44	1	1	0	110	
Irvine	1	2	8	69	1	8	78	1	1	2	171	
Norwalk	1	1	7	63	1	4	44	1	1	0	123	
Oakland	1	1	4	50	1	6	44	1	1	3	112	
Rancho Cucamonga	1	1	3	48	1	1	16	0	1	1	73	Compliance team includes an ICAT team
Riverside	1	1	5	62	1	4	40	1	1	2	118	Combined staff total of 133
<i>Riverside Branch Rancho Mirage</i>	0	0	0	0	0	1	14	0	0	0	15	
Sacramento	1	1	7	66	1	4	46	1	1	2	130	Combined staff total of 153
<i>Sacramento Branch --Redding</i>	0	1	1	14	0	2	5	0	0	0	23	
San Diego	1	1	8	70	1	4	38	1	1	2	127	
San Francisco	1	1	4	31	1	4	38	1	1	1	83	
San Jose	1	1	5	60	1	4	49	1	1	2	125	Combined staff total 148
<i>San Jose Branch - Salinas</i>	0	0	1	12	0	1	9	0	0	0	23	
Santa Clarita	1	1	3	36	1	1	9	1	1	1	55	
Santa Rosa	1	1	3	25	1	3	29	1	1	1	66	Combined staff total of 78
<i>Santa Rosa Branch - Fairfield</i>	0	0	1	11	0	0	0	0	0	0	12	
Ventura	1	1	3	26	1	3	17	0	1	0	53	
West Covina	1	1	3	39	1	4	31	1	1	0	82	
Out of State	1	1	3	26	0	0	0	1	1	6	39	Combined staff total 264
Houston / Western States	0	0	0	0	1	6	52	0	0	0	59	
New York	0	0	0	0	1	9	74	0	0	0	84	
Chicago	0	0	0	0	1	8	74	0	0	0	83	
Total	17	19	82	854	19	89	830	15	17	24	1966	

(1) The Local Area Network (LAN) coordinators for 3rd District are housed in the district office but report to HQ. The PY's for these employees are not included in the PY's for the District Office.

Office Rents and Walk-in Taxpayer Visitors

Equalization District	Office	Rent	Office Visitors FY 2015 / 2016	Office Visitors FY 2014 / 2015	Reduced Visitor Traffic
1	Fresno	41,529	4,476	6,475	-30.87%
	<i>Fresno Branch --Bakersfield</i>	23,646	5,202	8,138	-36.08%
	Sacramento	44,871	6,882	10,008	-31.24%
	<i>Sacramento Branch --Redding</i>	7,934	2,050	2,714	-24.47%
	Santa Clarita	61,834	2,988	4,136	-27.76%
	Rancho Cucamonga	32,270	1,027	-	
	Subtotal District 1	212,084	22,625	31,471	-28.11%
2	San Francisco	101,775	1,676	2,809	-40.33%
	Oakland	96,233	3,400	5,846	-41.84%
	San Jose	39,363	5,055	7,522	-32.80%
	<i>San Jose Branch --Salinas</i>	16,863	1,648	3,438	-52.07%
	Santa Rosa	22,798	2,069	3,185	-35.04%
	<i>Santa Rosa Branch --Fairfield</i>	15,139	1,589	1,304	21.86%
Subtotal District 2	292,171	15,437	24,104	-35.96%	
3	Norwalk	70,209	15,004	22,905	-34.49%
	Glendale	87,685	7,131	10,929	-34.75%
	West Covina	46,692	12,183	17,873	-31.84%
	Ventura	24,015	2,541	3,095	-17.90%
	Culver City	92,576	7,076	10,594	-33.21%
	Subtotal District 3	321,177	43,935	65,396	-32.82%
4	Irvine	73,692	9,396	11,746	-20.01%
	Riverside	168,238	8,450	13,143	-35.71%
	<i>Riverside Branch Rancho Mirage</i>	9,901	1,464	2,263	-35.31%
	San Diego	78,786	5,898	9,404	-37.28%
	Subtotal District 4	330,617	25,208	36,556	-31.04%
In State Total		1,156,049	107,205	157,527	-31.94%

Note: There is a math error on David's walk-in counts for 4th district for FY 14/15. The total says 27,152 but this is too low.

Summary of Walk-in Taxpayer Visits for the last 6 Years

Fiscal Year	Total Walk IN
FY 10/11	282,390
FY 11/12	270,083
FY 12/13	179,533
FY 13/14	178,910
FY 14/15	157,527
FY 15/16	107,205
Total	1,175,648

With e-Services the amount of taxpayer's coming into our offices is declining at a fast pace.

Permit Counts as of December 2015

Equalization District	Office	Branch/Satellite	Number of Taxpayer Accounts Dec 2015
1	Fresno		32,584
	Bakersfield	Branch	14,797
	Sacramento		66,628
	Redding	Branch	19,038
	Santa Clarita		24,263
	Rancho Cucamonga		26,145
	<i>Subtotal</i>		183,455
2	San Francisco		43,862
	Oakland		56,866
	San Jose		61,798
	Salinas	Branch	19,074
	Santa Rosa		36,749
	Fairfield	Branch	17,542
	<i>Subtotal</i>		235,891
3	Norwalk		54,778
	Glendale		53,897
	West Covina		54,112
	Ventura		26,896
	Culver City		64,216
	<i>Subtotal</i>		253,899
4	Irvine		87,776
	Riverside		46,304
	Rancho Mirage	Branch	10,753
	San Diego		79,731
	<i>Subtotal</i>		224,564
O/S	Out of State Sacramento		15,277
	Chicago	Area Office	20,135
	New York	Area Office	15,735
	Houston	Area Office	5,478
	<i>Subtotal</i>		56,625
TOTAL			954,434