

# Assessment Practices Surveys

The Assessor's Perspective

ITEM K3a  
8/27/19



# Survey or Sample – What's the Difference?

- ▶ Surveys
  - ▶ Review Assessor's Practices
  - ▶ Makes Recommendations for improvement
- ▶ Samples
  - ▶ Checks the Assessor's value conclusions
  - ▶ \$ Consequences \$



# How are Surveys/Samples Helpful?

- ▶ Supports Assessor's budget requests
- ▶ Independent Review of Assessor's practices
- ▶ Identify problem areas
- ▶ Ensures uniformity
- ▶ Can review specific complaints



# When are Surveys/Samples Not Helpful?

- ▶ Single Problem Recommendations
- ▶ Significant time delays
- ▶ Focus on minutia instead of real issues
  - ▶ Minimal impact on assessment roll



# CAA/Assessor Input

- ▶ Ad Hoc Survey Committee
- ▶ Responses
  - ▶ Informal Discussion
  - ▶ Formal Written Response



# Disagreements

- ▶ How do they arise?
  - ▶ Statute/BOE guidance vs
    - ▶ Assessor budget
    - ▶ Technology constraints
  - ▶ Practical Considerations
    - ▶ Assessor's mandate...discover, assess, enroll
  - ▶ Knowledge and experience level of BOE survey staff



# Disagreements

- ▶ How are they resolved?
  - ▶ Pre-Draft Conference
  - ▶ Response Letter
  - ▶ Training
  - ▶ Peer Guidance



# What's Missing?

- ▶ Budget [GC §15642]
- ▶ Staffing issues
- ▶ Assessment Appeals
  - ▶ Appeals Board
  - ▶ Local Board of Equalization



# Challenges for Assessors

- ▶ Space for BOE Staff
- ▶ Gathering Data
  - ▶ Previously provided
    - ▶ Annual Reports
    - ▶ Last Survey
  - ▶ Sample file copies
- ▶ Interruptions of Staff



# Suggestions for Improvement

- ▶ BOE Survey Teams
  - ▶ Better Recruitment/Retention
  - ▶ Training
- ▶ Report Timing
  - ▶ AB 681



# Suggestions for Improvement

- ▶ Statistical Data from BOE Reports
- ▶ No more surveys or samples
- ▶ Special Topic Surveys
- ▶ Collaborative Process
- ▶ Real World Experience for BOE Staff



Questions?

