

**CALIFORNIA STATE BOARD OF EQUALIZATION
PROPOSED WORKFORCE PLANNING WORKGROUP
November 19, 2019 Board Meeting
Co-Chairs: Vice Chair Vazquez and Member Gaines**

BRIEFING DOCUMENT

PURPOSE

Provides an overview of the Board's recent discussions about the proposed Workforce Planning Workgroup (Workgroup).

PROBLEM

During the October 22, 2019 Board meeting, Executive Director Brenda Fleming discussed the need to establish a workgroup to address statewide workforce challenges facing all parties involved with the administration of property tax.

Ms. Fleming stated, "The San Diego Informational Hearing held in September provided an opportunity to learn about the breadth and depth of challenges with recruiting, retaining, training, compensating, and developing the workforce with the talent and expertise that's needed to keep the state's property tax systems healthy and robust for years to come."

PROPOSAL

Ms. Fleming proposed a three-tiered approach for establishing the Workgroup, to be composed of representatives from the BOE, County Assessor offices, and private and public sector stakeholders, including tax consultants and educational institutions. The tiers outline the approaches necessary to address the challenges.

- **Tier 1** – Develop a plan for the BOE to use existing state processes to resolve classification and pay issues and other constraints that limit the BOE's ability to recruit qualified candidates. Currently, the BOE is working with CDTFA and CalHR on a salary study. BOE staff will update Board Members of its progress. BOE staff confirmed that data from a BOE classification study is available and will be provided to the Workgroup.
- **Tier 2** – Establish a coalition of private and public sector organizations, including County Assessors and staff, Board Members and staff, BOE staff, the Bureau of Real Estate Appraisers (BREA), and the Appraisal Institute (AI). The Workgroup will utilize BREA's and AI's knowledge and talent to expand the opportunities to attract and retain the staff necessary to maintain effective property tax administration. The BOE currently partners with the County Assessors' Association to develop training and continuing education courses that meet the needs of existing staff.
- **Tier 3** – Leverage the role of Board Members to engage with the Legislature, educational institutions, and other organizations to encourage private and public sector investment in the educational resources necessary to recruit new staff to the appraiser field. Focusing on appraiser-related education will ensure that California's property tax system, which provides a significant financial contribution to state and local government, remains a statewide priority.

APPROACH DIRECTIVES

Ms. Fleming will work with Chairwoman Cohen to add the Workforce Planning Workgroup to the Public Agenda Notice on an ongoing basis to ensure that Board Members and the public are

regularly updated, allowing the Board to take actions that will further the goals of the Workgroup.

Chairwoman Cohen confirmed that, in accordance with the Bagley-Keene Act, the Workgroup's meetings would be noticed and open to the public. She also provided the following guidelines:

- Vice Chair Vazquez and Member Gaines will serve as co-chairs of the Workgroup, with BOE staff providing data to Board Members and their staff in order to carry out the work;
- BOE staff will conduct a survey of County Assessors to obtain current workforce planning data;
- Beginning this month, Workgroup meetings will be scheduled monthly to examine issues relevant to workforce planning in the field of property tax administration; and
- The Workgroup will issue a report that outlines its conclusions and recommendations by February 2020.

CONCLUSION

Board Members, County Assessors, and other stakeholders agree recruiting new staff should be a top priority. There is currently a shortage of experienced appraisers, a situation that will only be exacerbated by many skilled employees retiring in the next decade. Something must be done now to ensure that taxpayers continue to have their property assessed fairly and accurately.