

RETIRED ASSESSOR HISTORICAL QUESTIONNAIRE

1. Before becoming Assessor I had worked in an Assessor's Office for 17 years prior to being elected Assessor. I started as an appraiser in Yuba County Assessor's Office, moved to Fresno taking a position in the Fresno County Assessor's Office and with time being progressively promoted to Supervising Appraiser in charge of the Assessment Standards Division.
2. I was first elected to office in November 1978, taking office in January 1979. In total I was elected to six four-year terms and retired in January 2003.
3. Full-time retiree
4. I had a positive relationship with my predecessor. Sometimes we disagreed but we were always able to exchange ideas and opinions without disharmony. Most often he would listen to and consider my suggestions.
5. My successor had worked in the Assessor's Office for a number of years. I had insight into his performance and development before he was under my personal supervision. We interacted well with each other and I believed he was trying to improve the quality and quantity of work generated by the Assessor's Office.
6. I ran for Assessor because I thought that I could make positive changes and incorporate new systems and technology into the workflow to create a more efficient and cost effective program. I maintained that there was an untapped resource in all the data and information within the Assessor's Office. I believed that I was the most qualified candidate for Assessor.
7. My greatest accomplishment was minimizing the impact of substantial budget cuts on work quality while enacting the changes necessary to implementing Proposition 13 and its subsequent modifications.
8. A substantial improvement in the functionality of the office could have been achieved if the budget process had been a projection longer than one year. Long range planning may have provided the resources and time needed to properly implement changes. The full range of programs and services including assessment roll, valuation, mapping, property ownership, exemptions and public information were adversely affected by restricted budgets.
9. The thing that I remember most fondly about my time in office was the extra hard work done by staff when needed, and the respect and support of the general public.
10. The part of my career that I wish hadn't happened was: because of budget cuts, I once removed eight professional staff members.

11. My relationship with the CAA was very positive. I am very proud to have participated in the actions of the CAA. I can think of no other professional association which so fully relies on its members' expertise to achieve better business practice. To be involved in the CAA is a guarantee to become a more knowledgeable and effective Assessor.

12. My recollection of the Assessor Scandals was that I was shocked that it could have happened. If the State Board sampling program was engaged as the law required (and it was) then this matter should have been discovered and exposed long before the disclosure by a tax agent. As it turns out whenever SBE asked for records which would have shown a problem, they were delayed, hassled, refused and run off. Why was this permitted by the Board? My guess is that they were afraid of the political consequences.

13. Through the late 1960's and 1970's there was constant and ever increasing pressure to raise all taxable property to the level required by law (fair market value). Based on sampling data the State Board of Equalization issued statements each year to show their findings of what effective assessment ratios each county had achieved. These findings were sent to the Governor, Legislature, Boards of Supervisors, City Councils and the newspapers. It was in the State's interest to assure school funding from property revenues were at the highest level permitted by law. While the State shared in property tax revenues they did not directly fund or support the Assessor's budget. This was true of all agencies which received allocations of property tax revenue. Because the Assessor had only enough staff to value a portion of the County each year, a cyclic methodology for reappraisal was used. A reappraisal in an area resulted in increased assessed value reflecting the change in market value for each property within that area since the prior reappraisal. The time between reappraisals could be three to seven years. This resulted in "Notice of Increased Assessment" cards being sent to property owners within reappraisal areas each year. Needless to say there were many upset property owners wanting to know why their property value had been raised so much since the last year. A sizeable portion of the valuation staff's time was spent responding to questions. The Assessor met with individuals and large groups explaining how assessed values could be raised so much. There were many Assessment Appeals Hearings. If spending agencies had reduced their tax rates in proportion to the increased assessment rolls, there would have been a greater acceptance by taxpayers; but that was not the common practice. As a result the Assessor was blamed for tax increases caused by the spending agencies. I remember people coming to the Assessor's Office by bus loads to question and object to increased property assessed values.
 - 13.1 I opposed Proposition 13 because it would create extreme differences in tax responsibility for properties of equal market value.
 - 13.2 It actually makes the Assessor's valuation easier. The disparity in property assessed values which now exists makes it impossible to revoke Proposition 13.

14. I was not involved in State or County politics. (Sometimes if a good candidate came along, I might try to help) At local level and at state level, I often promoted the CAA legislation agenda.
 14. 1 No, I did not run for any other offices.

15. The type of person who makes a good Assessor is a person who enjoys being involved with the public. They must be able to explain issues from all points and to rationally state why a particular choice of action was initiated. It is helpful to be tolerant of accusations of wrongdoing. They must be willing and able to lead their staff.
 15. 1 It can be very helpful and certainly shortens the learning curve of a new Assessor if he or she has an appraisal or real estate background, but I believe making it a requirement would not necessarily resolve the issues of unqualified or non-participatory Assessors. (Most of us can think of someone on our appraisal staff who is good at their job but would not be a good Assessor).

16. Nothing more.