

Retired Assessor Historical Questionnaire

July, 2005

1. Describe your career before becoming assessor.

I've worked for Sonoma County government for 35 years, beginning in the Social Services Department typing pool in 1971 as an entry level Clerk Typist I. After brief stints as a Clerk Typist II and III in the County's Central Collections Department (where we collected on the County's debt, predominately through payment agreements and court action), in 1974 I transferred to the County Clerk's Office, which at that time included the Clerk of the Superior Court functions. My initial responsibilities there included waiting on the counter for everything from issuing marriage licenses through copying and certifying court documents, collecting fees, processing purchases for the department, handling all accounting for the department, answering phones, supervising staff and generally serving as a "jill of all trades." By 1976, I had become the Assistant County Clerk, responsible for overall management and budgeting for all Clerk responsibilities, which included the Registrar of Voters, the Clerk of the Board of Supervisors, the County Clerk, and the Clerk of the Superior Court.

My first year in elections was tumultuous. We had two members of the Board of Supervisors' recalled, another resigned prior to recall, another lost his re-election bid, one of the winners of the recall lost his re-election bid – in that one year, we had 10 different Supervisors serving in the 5 seats. And our Presiding Judge lost his re-election to a deputy District Attorney. Not only was I Clerk of the Board and Clerk of the Court at the time, but it was also the first election I conducted. Needless to say, I have been relieved that that was not a normal year.

My professional life changed dramatically in late 1977, when my boss, the elected County Clerk-Eugene D. Williams, Jr., died of an aneurism the day after Christmas. I became Acting County Clerk automatically since I was the chief assistant. The office was up for election the following year, and I joined three other candidates in the contest for the seat. The election went to runoffs in November, and I was elected and then appointed by the Board to fill out the remainder of my predecessor's term. That election year was exciting to say the least – as both Assistant and Acting County Clerk, I was responsible for both jobs, which included all financial and budgetary work as well as the management of the four offices. It was the year of Proposition 13, so we prepared the equivalent of four departmental budgets, based on various scenarios, and we were in the middle of implementing our first computer systems in both the Courts and Elections.. Altogether, I've run for office 7 times, and had another contest only once – in 1986 when my assistant ran against me.

In the early 1980's, County Clerks became Commissioners of Civil Marriage by statute, so the ability to perform marriages – and to appoint other staff or individuals to also perform them – became a new responsibility of the office. That continues as a large workload function in the County Clerk's Office today.

In the early 1990's, major changes took place at the state level dealing with Superior Courts. Coupled with some "carving out" of court-related County Clerk duties to courts in some of the

counties in the state, new legislation requiring court expenditure reductions and increased efficiencies was passed. In our county, the two court administrators and myself got together, and recommended to the Courts, and ultimately to the Board of Supervisors, that the clerical and support functions for Municipal and Superior Courts be consolidated in order to meet the expenditure reduction requirements and also streamline court processing. I drafted our local court rules to split the Clerk of the Court functions from the County Clerk's Office, and assisted in the hiring of the Court Executive Officer who assumed those duties, together with that of administering the Superior and Municipal Courts. The split became effective at the beginning of my new term, in January, 1995.

Simultaneously with the above, our county went through a major reorganization study. One outcome was the assignment of the Public Administrator functions (which must be elected in a general law county like ours) and the Public Guardian and Public Conservator functions to me, with the direction to consolidate those offices and the services provided by them. That was also effective in January, 1995. The elected office was now County Clerk/Public Administrator, with the ex-officio duties of the Clerk including Registrar of Voters, Clerk of the Board, and Civil Commissioner of Marriages.

The next major change took place in 2001, with the further consolidation of first, the County Recorder in August, and then, the Assessor in October. Both of those offices were occupied by independently elected officials who retired in mid-term, and our Board of Supervisors combined those with the existing County Clerk/Public Administrator. When I ran for office (uncontested) in 2002, it was for County Clerk-Recorder-Assessor-Public Administrator.

A final major change took place initially in July, 2004, and will be finalized in January, 2007. I had consolidated the functions of Public Administrator/Public Guardian/Public Conservator into a single, cross trained office that provided services to a variety of aged or mentally ill conservatees and their estates. I recommended to the Board that the best fit for those services was with our Human Services Department, which provided related services to many of the same clientele, rather than with a record producing and record keeping organization such as the rest of my offices. That shift took place organizationally and fiscally in July, 2004, but the legal Public Administrator shift required special legislation allowing appointment rather than election of the office holder. That legislation was passed and implemented in 2005, and effective in January, 2007, the PA function shifts formally to Human Services. The remaining office to which my successor will be elected is County Clerk-Recorder-Assessor, including the ex-officio Registrar of Voters

2. Give the milestones of your Assessor career, year elected/appointed, reelection dates, date of retirement.

I became the appointed Assessor in October, 2001, when Jim Gallagher, the prior Assessor, retired in mid-term and the Board of Supervisors consolidated the office with the one I held as County Clerk-Recorder-Public Administrator. I was elected without opposition to the newly created position of County Clerk-Recorder-Assessor-Public Administrator in March, 2002. I will be retiring after 7 terms on January 8, 2007, at 12 noon.

3. Describe your career, if any, after retiring.

I haven't retired yet, but when I do, in my professional arenas, I will volunteer to work with the CACEO (California Association of Clerks and Election Officials) to provide statewide training classes regarding the various functions of the County Clerk. I will also be volunteering to assist in reviewing old historical documents, particularly in the County Clerk area, to inventory them and assist in creating a records retention schedule covering those documents. I don't currently have any other specific professional plans, though there are lots of personal plans.

4. What was your relationship with your predecessor?

I worked well with Jim Gallagher, my predecessor as Assessor. As a fellow elected County department head, we enjoyed a collegial relationship in various county organizations, such as the Department Head committees and various workgroups. During the County's reorganizational discussions in the early 90's, we had ongoing discussions regarding possible ways to improve the Assessment Appeals filing and hearing process, particularly since I am Clerk to the Board and hence, Clerk to the Assessment Appeals Board. As the Registrar of Voters, I also worked with him in providing election information regarding filing deadlines, processes, costs, etc. Prior to his election, I had limited dealings with him, most notably when he was president of the union of our general employees (called SCOPE at that time, late part of SEIU) during the early 1980's leading up to the employee strike of 1981. I participated in some of the bargaining sessions representing management while he represented line workers at that time. The sessions were cordial, but the sides were polarized and the 3 week strike was the result. I also worked briefly with both his predecessor, Steve Olsen, who had been appointed as interim Assessor (with the promise that he would not run for office when the election occurred), and his predecessor, Ernie Comalli, the elected Assessor who retired in mid-term. Steve struck me as a consensus builder, while Ernie was an extremely knowledgeable but occasionally controversial and confrontational personality.

5. What was your relationship with your successor?

My successor, Janice Atkinson, the Sonoma County Assistant Registrar of Voters, has worked with me for over 30 years., during most of that in the above capacity as the manager of the Registrar of Voters Division. She has also been my assistant department head over the County Clerk functions for a dozen years. She is extremely knowledgeable and very capable, and well-known in the state as "the" elections expert who is called on to testify at the Legislature, write and review elections law, consult with the Secretary of State and other agencies, and generally provide a very high level of competence in the field. Her performance in her job has been a huge part of why Sonoma County elections processes are so highly respected both in the state and by our voters, and why we have never had anyone file for an elections recount in my tenure in office. She has been my right arm in that field practically through my entire career, and I've never hesitated to delegate authority and responsibility to her. She is extremely dependable, and both a colleague and a friend. I've known both her and her family for these past 30 years and am very confident that she will do an excellent job in her new responsibilities.

6. Why did you run for assessor?

I ran for Assessor because the Board of Supervisors consolidated it with my existing elected office as County Clerk-Recorder-Public Administrator. While I actively asked for the consolidation of my office with the Recorder when Bernice Peterson, the previous long term

Recorder, retired and the Board decided to consolidate that office with either my office or that of the Assessor, I had not anticipated that the next move would be consolidation of the combined office with that of the Assessor. Given that the Recorder's office has very real links to both the County Clerk (particularly in the vital records arena and in the creation of the public record) and the Assessor (particularly in the real property transactions that trigger reassessment), once the first consolidation took place it made sense to the Board to also do the second. I was appointed to the unexpired term of Jim Gallagher, effective in October, 2001, and ran for the consolidated office the following year.

7. What do you consider your greatest accomplishments?

I've been very fortunate in my top managers, with extremely long term stability in key positions. The result has been competent, knowledgeable, capable management of very diverse offices by the Chief Deputies/Assistants positions providing for a relatively seamless transition from my leadership to future successors. Within a great many areas, Sonoma County is called for the "how to's" and "why's" of recording documents, processing marriage licenses or process server registrations, conducting elections, or managing public documents and all the myriad of other responsibilities we are charged with handling. I'm very proud to have built an organization that will continue to provide an excellent level of very capable service to the public for a very long time to come. I've tried to pick good people, develop their skills and capabilities, given them both responsibility and authority, and let them exercise both to improve both the work produced and their own skills. I think that has happened, and feel that is an enormously successful accomplishment. I've personally always believed that my job was given to me in trust by the voters, to lead and oversee on their behalf, not because of the individual holding the office but because the function itself was important. I'm pleased with what I am passing on to my successor.

Another accomplishment I have been proud of deals with the myriad organizational changes that I've been involved with over the past 30 years. I've been called on to de-consolidate (when I felt it was in the best interests of the organization to recommend and assist in the split of the Clerk of the Superior Court functions I was responsible for from the County Clerk functions), consolidate (when I worked to pull together the above Court Clerk functions and staff with the Superior Court Administrator and the Clerk/Administrator of Municipal Court offices), consolidate again (when I was asked to pull together divergent but similar conservatorship services under the Public Administrator, Public Guardian, Public Conservator), de-consolidate again (when I recommended those functions, once consolidated, be more appropriately housed with Human Services), and then consolidate twice more (first with the Recorder, and then with the Assessor). With all those organizational changes, there's been relatively little labor strife, improved production and service in many areas, savings in some areas but not just for the sake of savings, and generally a cordial and collegial working relationship with staff, management, the CAO, and the Board of Supervisors. Despite the magnitude of some of those organizational changes, there's been relatively little controversy and they have resulted in overall better utilization of resources and provision of services.

Another more concrete accomplishment that stands out for me is the "clean up" of the various California statutes to clarify the respective roles of County Clerks following the separation in some counties of some of their historical duties into multiple departments. A collaboration with the California Law Revision Commission in the late 90's and first few years of the 21st century

identified hundreds of code sections that needed to specify whether the responsible party was the County Clerk, the Clerk of the Court, the Clerk of the Board, or the Registrar of Voters – all had originally been identified as the County Clerk, but with some of those offices no longer being held by the same individual, those sections needed to identify which official was responsible for which function. That was largely accomplished by the County Clerk Legislative Committee I chaired, and shepherded through the Legislative process to become law. Straggling sections continue to be “cleaned up” as they are discovered.

Another County Clerk project that is underway includes the drafting of a statewide County Clerk reference and procedural manual, with annual staff training workshops that staff throughout the state can attend to receive training on how to do the various elements of their jobs. The first of those Staff Training Workshops will take place in March, 2007, and they will be an ongoing offering of the CACEO. Those were initiated, begun, developed, and staffed under my direction, and significant contributions to their ongoing success will come from Sonoma County. I’m very proud of that.

8. What did you wish you could have done differently?

I would like to have gotten more involved with the Assessor and Recorder issues and become more knowledgeable about both the “how’s” and the “why’s” and ultimately, any improvements that could be made. When those offices were consolidated with the County Clerk/Public Administrator, it was close to the end of my public service career. Both have enormously broad statutory and regulatory requirements, as well as significant impact on the public. I would have liked to have served longer in both areas and learned more, and hopefully, contributed more to not only the internal operations of the offices, but also to the statewide associations, CRAC and CAA. They are both fascinating and critical governmental functions, with a vast array of complex (and sometimes contradictory) statutes and regulations that have enormous impact on both the local citizenry and the many jurisdictional bodies at the local and state levels. I’d just got to the point where I felt somewhat knowledgeable and informed about the major issues surrounding those functions when I retired.

9. What do you remember most fondly about your time in office?

The people – staff, coworkers, colleagues, the public, the media, other electeds – the interaction with them, the sometimes lively discussions (or disagreements) over interpretation of law or of process, the brainstorming sessions to come up with a better way or new solution, the occasional “bitch sessions” when things seemed to be “heading to hell in a handbasket”, the stories of who did what when and the laughter that so often resulted, the camaraderie. They all repeatedly reinforced my intrinsic belief that most people take their responsibilities seriously, that they want to do the right thing, that they take pride in the product they produce, and that they have the best interests of the public we serve as a major focus.

I particularly enjoyed the statewide connections with colleagues in the various associations – CACEO, CRAC, and CAA. The overall breadth of knowledge and capability was awesome – and very reassuring to know the truly superb level of expertise and commitment of officials serving the local citizens in such crucial areas.

10. Were there any parts of your career that you wish had not happened?

I only had opposition twice in the seven times I ran for office. The second – and fortunately last – time was an assistant who ran against me (and no, not Janice, who just got elected to succeed me). The campaign she conducted was very acrimonious and left some pretty bitter and divisive feelings in the office, since some of her attacks were directed at staff. Both the campaign and the aftermath, when she returned to work for several months, were difficult times for me and the offices, and it took many months to get the office environment back to a normal, professional, inviting place to work. I would certainly have been glad not to have gone through that experience.

Another event that dramatically impacted not only me, but the entire county government was the suicide of our County Administrator, Tom Schopflin. He was a charismatic leader, a superbly competent administrator, a mentor, and a friend. He created what felt like a large family of department heads, managers, and staff who all contributed toward a common goal. His death was extremely traumatic and shocking and rocked not only the stability of our county government, but many of the county officers personally. I still miss him today and often think “what would Tom do” in a given situation.

11. What was your relationship with the CAA?

I relied heavily on CAA for the knowledge of the members, the networking and contacts regarding issues in common, the legislative and procedural recommendations. I looked forward to the various conferences and attended most, and served as Bay Area Regional President and Executive Board member in 2005. I also served on the History and Preservation Committee during the 5 years I was in the Association. I admired their work, purloined their knowledge, and treasured their relationships.

12. What is your recollection of the “Assessor Scandals” of the 1960s?

I only know what I’ve learned through the CAA and some of the historical information compiled by the History and Preservation Committee. I didn’t get involved with county government until 1971, and with the Assessor’s Office until 2001, so have no personal recollection of those scandals.

13. Describe the pressure and stress of the Assessor’s job prior to the passage of Proposition 13?

Given that I was not involved with Assessor’s issues prior to 1978, I don’t know much about that period. I would assume there would have been significant pressure to annually value huge numbers of parcels, to resist pressure to value them at the highest levels to increase the property tax revenue resulting from them, and a great deal of pressure from the property owners to value them at the lowest levels to keep the tax impacts down, but all of that is pretty speculative. There was probably a great deal more I know nothing about.

- Did you actively oppose or support Proposition 13?

No, as the official in charge of elections in Sonoma County, I took (and currently take) no position on any issue or candidate that will appear on the ballot. I don't support or oppose measures, and I don't endorse candidates. I think taking positions of those sorts has the potential to undermine the public's belief in the neutrality of the office and leave it open to perceptions of bias or favoritism.

- How did you feel about Proposition 13 now?

I personally have benefited from Proposition 13 so my perception is somewhat biased. As a property owner who hasn't moved in years, it certainly has allowed me to manage my property tax bills in a reasonable manner and has been a life-saver in this era of escalating property values to proportions that I feel border on the obscene. I certainly sympathize with many other property owners who have only been able to afford to stay in their long-term residences because of Prop 13, particularly given the runaway property tax increases that preceded its passage.

As the Assessor, I've seen some of the significant inequities, with comparable properties standing side by side having a tax liability that is hugely divergent. I'm also bothered by the somewhat creative methods used to try to avoid the change of ownership trigger, which has had significant impact not only on our staff but also on local government policy. Another, broader area of concern is Prop 13's impact on how local government is financed. In effect, Prop 13 instigated a major reliance for financial survival from local control to the state, which has not always been a cooperative relationship. It certainly hasn't been stable or consistent over time, and while that might not have been an intent of the Proposition, it certainly is an outcome – a major negative one in my opinion. Another area of unexpected consequences that I would like to see addressed at some point is the windfall Prop 13 created for most large scale commercial organizations. Because of the applicable rules and impact of our assessing methodology, the property tax burden has increasingly shifted from business to residential owners as a result of Prop 13. I would personally like to see a separate tax rate applied to those properties, with some of the more glaring loopholes filled, to more evenly spread out the property tax burden.

14. Were you involved in State or County politics, other than the Assessor's Office?

- Were there other offices you ran for while in office as Assessor?

As indicated in #1 above, I've served as the elected County Clerk, Recorder, and Public Administrator throughout the period in which I also served as Assessor. I did not run for any other elected office, not only because there was plenty to do in my county responsibilities, but also because of the potential conflict of interest that could arise given that I was also the Registrar of Voters.

15. What kind of person do you think it takes to make a good County Assessor?

- Should an Assessor be required to have an appraisal or real estate background?

I think that while an appraisal or real estate background is extremely helpful to a County Assessor, it is not absolutely critical prior to entering into the duties. The current requirement that an appraisal certificate be obtained within the first year of assuming

office is a necessary requirement and an excellent incentive to begin learning as much as possible about the overall concepts and processes very early on. An understanding of valuation issues and principles, of real estate related terminology and legalities, of the fundamental responsibilities of the Assessor within the overall structure of government are critical elements to doing a good job, but they can be gained with education and training and sheer time on the job. Having stated that, if someone who was elected to the position did not have that knowledge going into the job, they would absolutely need a knowledgeable and capable staff to work with as they entered into the profession. The daily work continues and the concepts and appraisal methodologies must be applied to that work while the Assessor is learning the overall basics.

In today's world, a good County Assessor also needs to be a good manager, someone comfortable in the reading, researching, analyzing and applying of law and rules to a variety of circumstances, someone who can work cooperatively with other people (whether taxpayers, members of the various elected bodies, other regulatory bodies, staff, colleagues), someone who is both a good listener and a good decision maker, and someone who is open to divergent viewpoints. Ultimately, I think a good Assessor also needs to be able to step back from personal relationships (good or bad) and apply the principles and requirements of his/her job even-handedly and fairly and without bias or favoritism, regardless of pressure or personal feelings.

16. Please add anything that we may have missed in the interview that you think would be interesting.

I am a naturalized citizen who came to the United States as a young child with my mother and brother in 1950. I was born in a displaced persons' camp in what was West Germany, where my mother (displaced from Estonia) was waiting for a visa to emigrate. We came over on a ship with a suitcase apiece and literally "the clothes on our backs." My father, a British merchant marine sailor, joined us a year later. That experience, and the welcome and opportunities provided by this country to my family left a pretty indelible and permanent impression. I've always felt compelled to give something back, and public service has been such a rewarding career – professionally and financially – but also enormously satisfying. I've truly been blessed to receive the trust and confidence of the public in carrying out the responsibilities they've entrusted to me on their behalf. It's been a fabulous 35 years.

Eeve T. Lewis
Sonoma County Clerk-Recorder-Assessor-Public
Administrator (Registrar of Voters-Clerk of the
Board- Commissioner of Civil Marriages)

- * Any interesting photos are encouraged. Please include description.