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**Office of the Assessor-Recorder
FY2015-16 and FY2016-17
Proposed Budget**

**Carmen Chu, Assessor-Recorder
Budget and Finance Committee
June 15, 2015**



San Francisco's Real Estate Activity Driving ASR Workload

- ❖ Strong demand for real estate, increasing prices and rebounding business climate
- ❖ Transfer Tax Revenue at 10-year High
 - ❖ Est. \$304 million by end of FY15
- ❖ Real Estate Development Pipeline – 958 Projects
 - ❖ 508 Projects Entitled
- ❖ Projects Under Construction: 215
 - ❖ 5.4 million net commercial sq. feet
 - ❖ 6,700 housing units

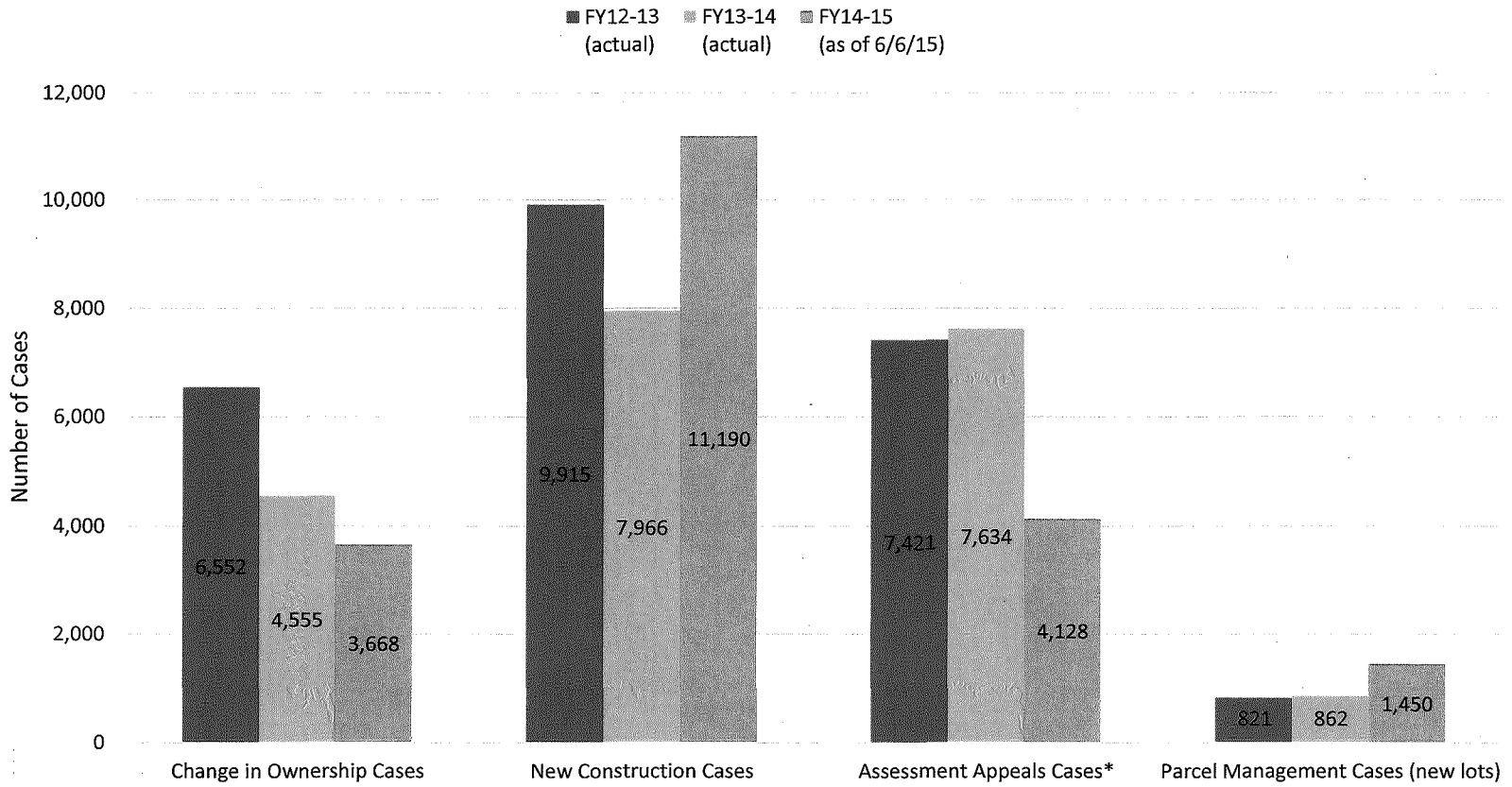
(San Francisco Pipeline Report Q3 2014, Planning Dept.)

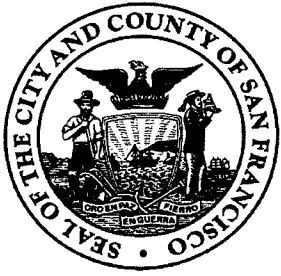




Snapshot of Caseload FY13-FY15

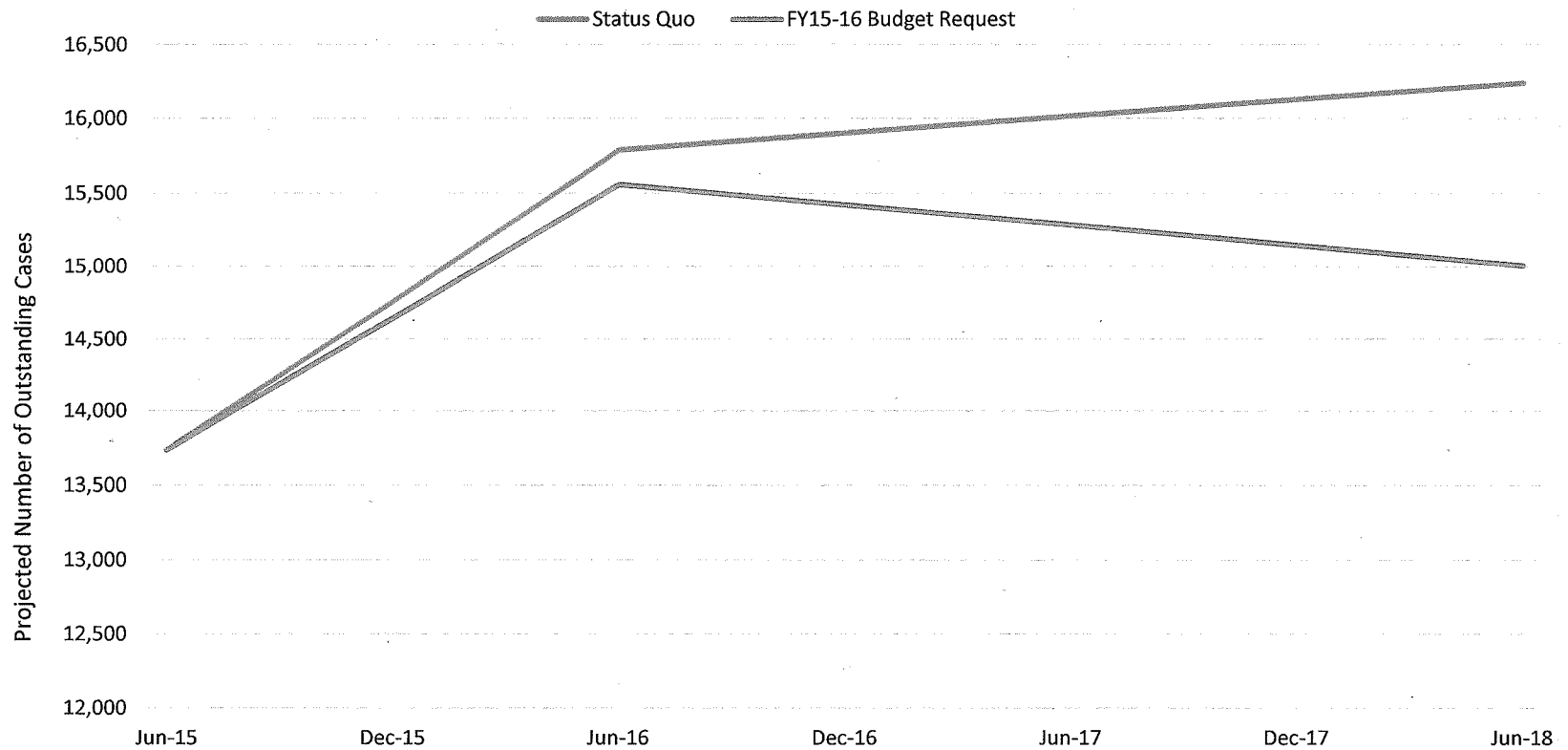
Pending Assessment Cases by Type and Fiscal Year





Caseload Levels Expected to Outpace ASR's Capacity

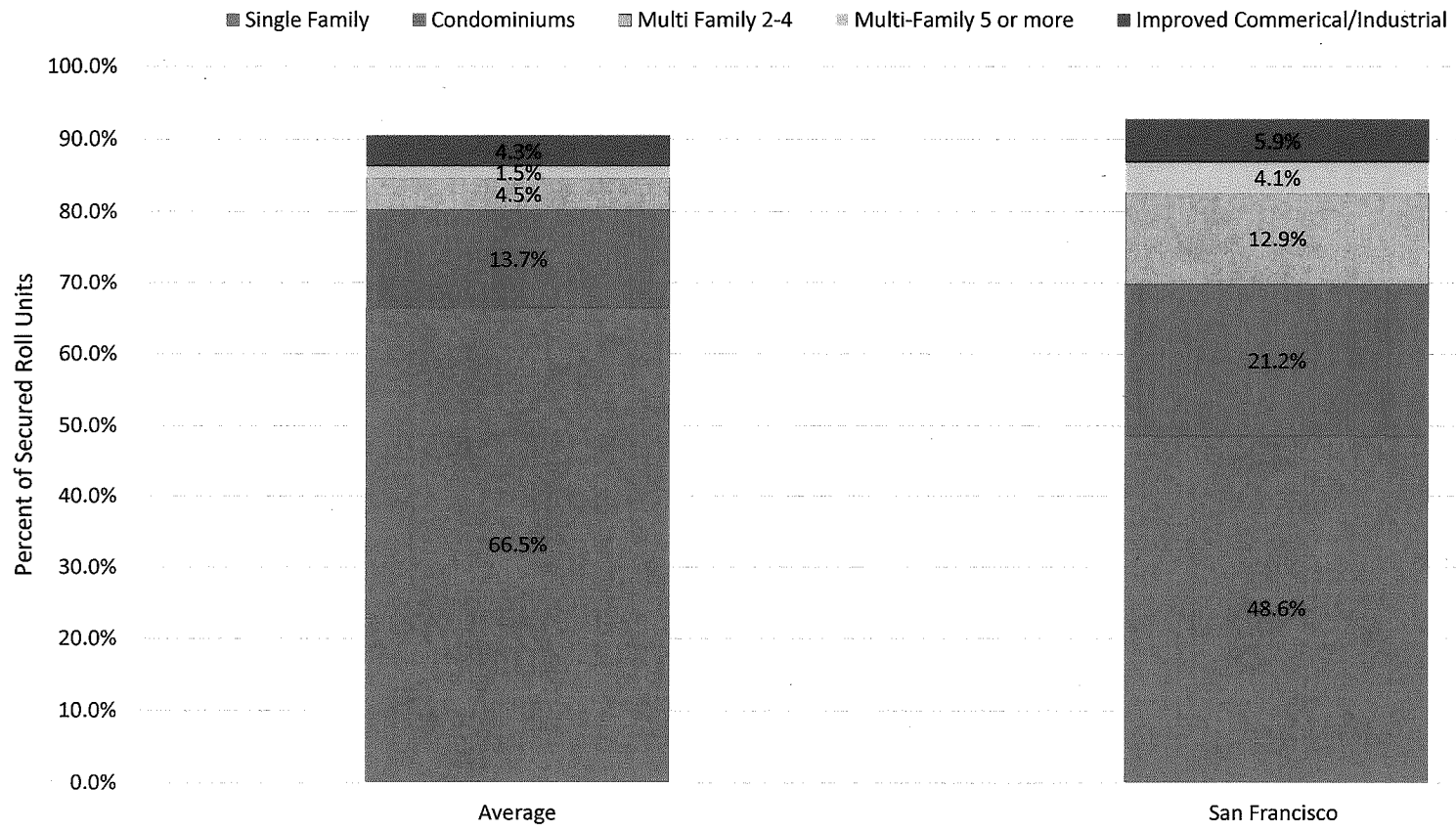
Projection of Pending Assessment Cases from FY2015 to FY2018





San Francisco: Higher Percentage of Complex Assessments

Complexity of Assessments by Parcel Type





Recent Budget Investments Showing Progress

- ❖ Filled 36 Vacant and New Positions in FY14-15 (25% of Workforce)
 - ❖ Filled 80% New FY14-15 Positions
- ❖ Hired New IT, HR and Finance Staff to Support organization
- ❖ Reduced Pending Appeals Workload with AAB Team
- ❖ Expanded E-Recording – More than 60% Filed Electronically
- ❖ Automated E-filing Workflow for Business Property Statements
- ❖ Launched New Website
- ❖ Initiated preservation and conversion of 205,000 Real Property Files



FY2015-17 Budget Investments

- ❖ Restructuring Organization to Respond to Changes in the Real Estate Market
 - ❖ Reassigned 16 FTE Appraisers from Assessment Appeals Team to Provide Ongoing Flexibility to Work Appeals, New Construction and Change in Ownership Cases

- ❖ Piloting New Strategies to Improve Efficiency and Ensure Taxpayer Equity
 - ❖ Launching a 4260 Appraiser Trainee Program (2.54 New FTE) to provide a career ladder for clerical staff to become appraisers and in training
 - ❖ Adding New Analytical Staff (1.54 FTE – 1820 Admin Analysts) and ASR Senior Office Specialist (0.77 FTE) to gather assessment-related data/property characteristics

- ❖ Adding Administrative Staff to Support Operations
 - ❖ New 1241 Personnel Analyst to Execute Ongoing Hiring Plan (.77 FTE)
 - ❖ New 1042 IS Engineer to Support ASR's Critical IT infrastructure (1.0 FTE)



Property Tax System Replacement Project

Impact - RUMBA AS/400 Display

File Edit View Connection Transfer Options Tools Help

..... Real Property Master Displayed: 8/12/2015

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Block Lot Roll RollCde
Vol @@ APN 0000 _ 000 _ Year 2014 EvtDate Seq 000 VSC
Location Typ 0 Date
Owner Bill Num Res#
Care Of Not.Date Next
Address TransCde
CityStZip Date
Status Cde NewConst
Use Code NC Date Apl#
Class Code
Nbrhd Code TempCode
CPI Factor TRH TempDate
Tax Rate Acct # Appr Id
Last Sale 506Int PnltyCd
Base Years ExmPnlty
Land Improvement 400 Penalty
Temp Land Temp Impr Total L&I
Pera Prop Fixtures Total Temp
Remarks Exemptions
Taxable
Enter Block Lot and Year then hit ENTER. F1=Search F3=Exit
  
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SA MW KS IM II KB SSL KRB 314



Property Tax System Replacement Project

Impact - RUMBA AS/400 Display

File Edit View Connection Transfer Options Tools Help

Auto Size Window Larger Master Displayed: 6/15/2015

Read Only Block Lot Roll 2014 RollCde 1 Secured

Vol 06 APN 0787 001 Year 2014 EvtDate 2/29/1969 Seq 001 VSD ENS 50

Location CITY HALL Typ RES 0 RES ROLL Date 8 30 2014

Bill Num Res# 40174

Owner CITY PROPERTY Not Date Next

Care Of DIRECTOR OF PROPERTY

Address 18 VAN NESS AVE TransCde

CtyStZip SAN FRANCISCO CA 94102 Date 2/29/1969

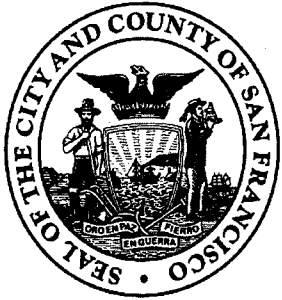
| | | |
|------------------------|-------------------------|-------------------------|
| 01 Ownership History | 07 Valuation Methods | 13 Class Code/Situs Chg |
| 02 Change of Ownership | 08 Notes Screen | 14 Chars. Summary |
| 03 Enrollment History | 09 New Construction | 15 Land Characteristics |
| 04 Sales History | 10 NewConstruction Summ | 16 Office/Retail Chars |
| 05 Value Screen | 11 Appeals Tracking | |
| 06 Partial Interest | 12 Parcel Split/Combo | |



FY2015-17 Budget Summary

| | Approved FY14-15 | Proposed FY15-16 | Change from FY14-15 | Proposed FY16-17 | Change from FY15-16 |
|----------------------|-----------------------------|-----------------------------|--------------------------------|-----------------------------|--------------------------------|
| Total Budget: | \$23.86 | \$25.00 | \$1.15 | \$25.10 | \$0.10 |
| FTE Total: | 147.07 | 165.20 | 18.13 | 166.91 | 1.71 |

| FTE Changes | FY15-16 | FY16-17 |
|---------------------------|----------------|----------------|
| New Positions | 7.16 | 1.84 |
| State Grant Positions | 5.00 | - |
| Reassignment to On-Budget | 4.00 | - |
| Annualized FY14-15 FTE | 2.07 | - |
| Attrition | (0.10) | (0.13) |
| Total | 18.13 | 1.71 |



FY2015-17 GFS Summary

| | Approved FY14-15 | Proposed FY15-16 | Change from FY14-15 | Proposed FY16-17 | Change from FY15-16 |
|------------------------------|-----------------------------|-----------------------------|--------------------------------|-----------------------------|--------------------------------|
| Expenditures | \$21.97 | \$22.68 | \$0.70 | \$22.78 | \$0.09 |
| Work Order Recoveries | (\$1.25) | (\$1.35) | (\$0.10) | (\$1.35) | - |
| Revenues | (\$2.83) | (\$2.43) | (\$0.40) | (\$2.43) | \$0.00 |
| GFS Support | \$17.89 | \$18.89 | \$1.01 | \$18.99 | \$0.09 |

GFS Increase Comprised of:

- 40% Backfill General Fund Recorder Fees
- 37% Cost of FY14-15 Positions & Citywide Wage & Benefit Increases
- 23% New Investments