



BOARD OF SUPERVISORS
AGENDA LETTER

Agenda Number:

Clerk of the Board of Supervisors
105 E. Anapamu Street, Suite 407
Santa Barbara, CA 93101
(805) 568-2240

Department Name: Clerk-Recorder-
Assessor
Department No.: 062
For Agenda Of: April 5, 2022
Placement: Departmental
Estimated Time: 5 minutes
Continued Item: No
If Yes, date from:
Vote Required: Majority

TO: Board of Supervisors
FROM: Department Joseph E. Holland, County Clerk, Recorder, Assessor (x82558)
Director
Contact Info: Susan Kean, HR Manager (x82570)
SUBJECT: Approve Extra-Help Services and Retirement Waiver for Clerk-Recorder-
Assessor's Office

County Counsel Concurrence

As to form: Yes

Other Concurrence: SBCERS

As to form: Yes

Auditor-Controller Concurrence

As to form: Yes

Recommended Actions:

That the Board of Supervisors:

- a) In accordance with California Government Code Section 7522.56(f)(1), certify that the appointment of retired County employee Susan Morrison, Chief Deputy Assessor, is necessary to fill a critical need in the Clerk-Recorder-Assessor's Office before 180 days have passed from her date of retirement; and
- b) Approve and authorize the Clerk-Recorder-Assessor's Office to appoint retired employee, Susan Morrison, as an Extra Help employee to provide training on a part time basis not to exceed 960 hours of annual service with an appointment effective date of April 4, 2022; and
- c) Determine that the above actions are not a project under the California Environmental Quality Act (CEQA) pursuant to CEQA Guidelines Sections 15378(b)(4) and 15378(b)(5) because they consist of government administrative or fiscal activities that will not result in direct or indirect physical changes in the environment.

Summary Text:

The purpose of this item is to request that your Board certify that there is a critical need to allow the Clerk-Recorder-Assessor's Office to hire retired Assistant Department Leader (Chief Deputy Assessor) Susan

Morrison as an Extra-Help employee before 180 days have passed from her date of retirement. Ms. Morrison would be hired to assist the Assessor's Office by overseeing and directing the timely completion of work and the closing of the 2022 Assessment Rolls, training and assisting with the transition of her successor, serving as a subject matter expert with complex assessment appeals, and serving as a subject matter expert in the development of the Valuation module of the new Assessor Property System. Ms. Morrison retired as the Chief Deputy Assessor on 3/30/2022. While the Office was aware that Ms. Morrison was planning to retire, the exact timeframe was unknown. Ms. Morrison provided a one-month notice of her retirement, which was not enough time to recruit, appoint and train her successor.

Background:

The Assessor's Office is responsible for discovering and assessing all property within the County as required by law. Per California Tax and Revenue Code, the Assessor's Office must produce and deliver an assessment roll by July 1st of each year. The assessment roll becomes the base upon which local property taxes are levied, collected and distributed to the cities, County and special districts to fund government services.

Ms. Morrison has 38 years of expertise in the Assessor's Office and unparalleled executive leadership skills. Her extra help appointment will ensure County residents are best served and statutory obligations are met with the timely closing of the tax rolls (valued at \$99,812,691,616 in 2021) as well the handling of assessment appeals, particularly the designated complex cases with a value at risk of \$2,000,689,515, during this transitional period of leadership in the Office. Ms. Morrison will provide a continuity of leadership and service during the recruitment process and training period for her successor. The Assessor's Office anticipates that Ms. Morrison will be needed in this role for approximately six months to one year, for no more than 960 hours per fiscal year.

Fiscal and Facilities Impacts:

Budgeted: Yes

Fiscal Analysis:

It is anticipated that Ms. Morrison will provide Chief Deputy Assessor services up to 960 hours until a replacement is identified and hired. In accordance with California Government Code section 7522.56(d), Ms. Morrison will perform this work at a salary rate that does not exceed the maximum authorized in the County's salary table for Assistant Department Heads. The EXH position cost will be covered by existing budgeted funds, and will not result in an increase to General Fund Contribution.

Special Instructions: shkean@co.santa-barbara.ca.us

Authored by:

Susan Kean, HR Manager