

**COUNTY OF SAN LUIS OBISPO BOARD OF SUPERVISORS
AGENDA ITEM TRANSMITTAL**

(1) DEPARTMENT Assessor	(2) MEETING DATE 7/16/2013	(3) CONTACT/PHONE Charron Sparks/781-5646	
(4) SUBJECT Submittal of a resolution authorizing the Assessor to enter into a Joint Powers Agreement with the State Board of Equalization and other participating counties for the purpose of creating an E-forms Portal for the collection, storage, and maintenance of assessment information.			
(5) RECOMMENDED ACTION It is recommended that the Board approve a resolution authorizing the Assessor to enter into a Joint Powers Agreement with the State Board of Equalization and other participating counties for the purpose of creating an E-forms Portal for the collection, storage, and maintenance of assessment information.			
(6) FUNDING SOURCE(S) FC 109- Assessor FY 13-14 Budget	(7) CURRENT YEAR FINANCIAL IMPACT \$1,300	(8) ANNUAL FINANCIAL IMPACT Year 1: \$1,300 Year 2: \$1,300 Year 3: \$600	(9) BUDGETED? No
(10) AGENDA PLACEMENT <input checked="" type="checkbox"/> Consent <input type="checkbox"/> Presentation <input type="checkbox"/> Hearing (Time Est. ___) <input type="checkbox"/> Board Business (Time Est. ___)			
(11) EXECUTED DOCUMENTS <input checked="" type="checkbox"/> Resolutions <input type="checkbox"/> Contracts <input type="checkbox"/> Ordinances <input type="checkbox"/> N/A			
(12) OUTLINE AGREEMENT REQUISITION NUMBER (OAR) N/A		(13) BUDGET ADJUSTMENT REQUIRED? BAR ID Number: N/A <input type="checkbox"/> 4/5th's Vote Required <input checked="" type="checkbox"/> N/A	
(14) LOCATION MAP N/A	(15) BUSINESS IMPACT STATEMENT? N/A	(16) AGENDA ITEM HISTORY <input type="checkbox"/> N/A Date: _____	
(17) ADMINISTRATIVE OFFICE REVIEW Emily Jackson			
(18) SUPERVISOR DISTRICT(S) All Districts -			

County of San Luis Obispo



TO: Board of Supervisors

FROM: Charron Sparks/781-5646

DATE: 7/16/2013

SUBJECT: Submittal of a resolution authorizing the Assessor to enter into a Joint Powers Agreement with the State Board of Equalization and other participating counties for the purpose of creating an E-forms Portal for the collection, storage, and maintenance of assessment information.

RECOMMENDATION

It is recommended that the Board approve a resolution authorizing the Assessor to enter into a Joint Powers Agreement with the State Board of Equalization and other participating counties for the purpose of creating an E-forms Portal for the collection, storage, and maintenance of assessment information.

DISCUSSION

The California County Assessors' E-Forms Portal was created in March 2013 with the primary purpose of collecting, storing, and maintaining data necessary to the assessment functions performed by California County Assessors via electronic media. Assessors will share in the development and ownership of the common data handling facility and will share in the associated costs and liabilities on a proportionate basis (based on county size and anticipated usage by taxpayers).

Each year, the State Board of Equalization provides approximately 100 forms for Assessor use. Every year, Assessor staff spends considerable time updating and printing the forms for use in the county, and then manually entering taxpayer and assessment data into the County's mainframe property tax system. Annual updates to forms typically include revisions related to assessment year, fee changes (if any) and any relevant changes related to legal requirements. With the E-Forms Portal, these forms will be updated automatically and converted into SmartForms to be filled out and submitted online by taxpayers. The data collected will not be shared between the parties involved in the Joint Powers Agreement (JPA), except as authorized by Revenue & Taxation Code. Each Assessor's data will be maintained separate and distinct to individual counties, in accordance with Revenue & Taxation Code Sections 408, 451 and 481.

The E-Forms Portal will allow the Assessor to provide a link on the County's website (on the Assessor's page) to the E-Forms site where the specific forms used by the County will be available in a SmartForm pdf format. Taxpayers will be able to complete the form(s) online and then submit forms directly to the Assessor's Office. Each E-Form will have a date/time stamp with a confirmation number to enable customers to track their submitted forms. The Assessor will receive the submitted electronic data on scheduled download intervals, eliminating the need for Assessor staff to spend time doing data entry, and freeing up time for staff to focus on other assessment work.

In order to use the E-Forms portal, the Assessor must enter into a JPA with the State Board of Equalization and the other counties involved. The agreement provides for the confidential handling of taxpayer information and the cost sharing between all parties involved. The Assessor entered into a similar JPA in 2008 for the electronic filing of business property statements, which has proven to be a successful and effective program for the department.

OTHER AGENCY INVOLVEMENT/IMPACT

County Counsel has reviewed and approved the JPA and the resolution authorizing the Assessor to execute the JPA as to form and legal effect. The County's Information Technology Department has been consulted and confirmed that the E-Forms portal does not interface/integrate with County computer systems, including the property tax system, and that further involvement from Information Technology will not be necessary.

FINANCIAL CONSIDERATIONS

The cost of the creation and maintenance of the E-Forms Portal will be shared by all participating parties in the JPA. Each county's share of costs is determined on a proportionate basis, based upon county size and expected use of the E-Forms portal, based on the number of assessment units on a county's assessment roll. Of the 58 counties statewide, 54 have indicated the intention to participate in the JPA and four counties have not yet responded. San Luis Obispo County's share is expected to be \$1,300 in each of the first two years and \$600 for the third year of the agreement, which expires June 30, 2016. The costs will be offset by expected expenditure savings due to a decreased need to print and mail forms to the public. Exhibit A of the JPA (attached) clearly identifies the cost sharing between the counties.

RESULTS

Participation in the JPA for the purpose of creating an E-Forms Portal for the collection, storage, and maintenance of assessment information will decrease the amount of staff time required to annually update forms and perform data entry of information placed on the forms by taxpayers. The E-Forms portal will also improve the public's access to forms, enabling taxpayers to enter data online, using fillable forms (SmartForms), and providing a filing confirmation number to track their forms

ATTACHMENTS

1. Resolution Authorizing Assessor to Execute JPA
2. Joint Powers Agreement