



# California State Board of Equalization

## **BOARD WORK GROUP: WORKFORCE PLANNING MEETING**

**450 N Street, Auditorium, Sacramento**

**Tuesday, July 25, 2023**

## **AGENDA**

**Convene** – This Board Work Group Meeting Convenes upon recess of the *Veterans' Exemption, Disabled Veterans' Exemption, and Homeowners' Exemption Board Work Group*.

### **Call to Order**

1. Greetings and Introductory Remarks.....Mr. Vazquez / Mr. Gaines

Work Group Board Members, the California Assessors' Association, and County Assessors from large, medium, and small counties will update and revise as needed continuing efforts to develop opportunities for recruitment and training solutions as a statewide effort to build a pipeline of skilled property tax talent. Upon the conclusion of all meetings, the Board Work Group (BWG) will report back to the Board with recommendations for possible actions.

#### Speakers:

Hon. Antonio Vazquez, Co-Chair,  
Member, Third District

Hon. Honorable Ted Gaines, Co-Chair,  
Member, First District

Hon. Kristine Lee, President, California  
Assessor's Association (CAA); and Kings  
County Assessor-Recorder-Clerk

2. [Overview of 2020 Report](#).....Mr. Vazquez / Mr. Gaines

Report by the Executive Director and staff on the BOE efforts toward the four goals in the [Comprehensive Outline](#) for the Workforce Planning BWG Report.

Speaker:

Yvette Stowers, Executive Director, BOE

[Lisa Renati, Chief Deputy Director, BOE](#)

David Yeung, Deputy Director, Property Tax Department, BOE

3. Updated Workforce Assessment – Recruitment and Retention Capacity and Needs .....Mr. Vazquez / Mr. Gaines

Update on current needs, recruitment efforts, successes, challenges, current and projected attrition rates, current efforts used to retain appraisers and auditor-appraisers, and opportunities for modernization of recruitment and retention.

a. California Assessors’ Association

Speaker: Hon. Kristine Lee, President, CAA; and Kings County Assessor-Recorder-Clerk

b. Large Counties

Speaker: Joseph Vicente, Chief Appraiser, Training Division, Los Angeles County Assessor’s Office

c. Mid-Size Counties

Speaker: Hon. Don H. Gaekle, Stanislaus County Assessor

d. Small Counties

Speakers: Hon. Kristen DePaul, Modoc County Assessor-Recorder  
Hon. James B. Rooney, Amador County Assessor

4. Update and Discussion of Mandated Appraiser and Auditor-Appraiser Certification Training and Options.....Mr. Vazquez / Mr. Gaines

Discussion of assessors’ office training methods, efforts, challenges and/or gaps; and opportunities for program modernization.

a. Large Counties

Speaker: Joseph Vicente, Chief Appraiser, Training Division,  
Los Angeles County Assessor's Office

b. Mid-Size Counties

Speaker: Hon. Don H. Gaekle, Stanislaus County Assessor

c. Small Counties

Speakers: Hon. Kristen DePaul, Modoc County Assessor-Recorder  
Hon. James B. Rooney, Amador County Assessor

5. Wrap up and Next Steps .....Mr. Vazquez / Mr. Gaines

Identify for future BWG meetings and discussion issues of concern,  
including, but not limited to compensation and classification, and  
community college course offerings and recruitment.

a. California Assessors Association

Speaker: Hon. Kristine Lee, President, CAA; and  
Kings County Assessor-Recorder-Clerk

b. Board Members

Speakers:

Hon. Antonio Vazquez, Co-Chair,  
Member, Third District

Hon. Ted Gaines, Co-Chair,  
Member, First District

Hon. Sally Lieber, Member, Second District

Hon. Mike Schaefer, Member, Fourth District

Hon. Malia M. Cohen, State Controller,  
represented by Deputy State Controller, Hasib  
Emran

**Adjourn Board Work Group**

## **Board Work Group Meeting Agenda Changes**

The following is a list of each change to the agenda, including the date of change, item number, item name and description of change.

07/18/23 | 2 | Overview of 2020 Report | Material Added

07/19/23 | 2 | Overview of 2020 Report | Material Added

07/21/23 | 3 | Updated Workforce Assessment – Recruitment and Retention Capacity and Needs | Speakers Added

07/21/23 | 4 | Update and Discussion of Mandated Appraiser and Auditor Appraiser Certification Training and Options | Speakers Added

07/21/23 | 5 | Wrap up and Next Steps | Speakers Added

07/24/23 | 4 | Update and Discussion of Mandated Appraiser and Auditor Appraiser Certification Training and Options | Speakers Updated