



# CALIFORNIA ASSESSORS' ASSOCIATION

## Education Committee

### COMMITTEE MEMBERS

**VINCENT P. KEHOE**

Mariposa County  
Education Committee Chair  
[vkehoe@mariposacounty.org](mailto:vkehoe@mariposacounty.org)  
(209) 742-1333

**KRISTEN DEPAUL**

Modoc County  
CAA Vice President  
[kristendepaul@co.modoc.ca.us](mailto:kristendepaul@co.modoc.ca.us)  
(530) 233-6219

**MATTHEW R. MAYNARD**

Placer County  
NCAA Representative  
[mmaynard@placer.ca.gov](mailto:mmaynard@placer.ca.gov)  
(530) 889-4309

**LAURA AVILA**

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CSCAA Representative  
[avila@kerncounty.com](mailto:avila@kerncounty.com)  
(661) 868-3315

**JESSE SALINAS**

Yolo County  
BAAA Representative  
[jesse.salinas@yolocounty.org](mailto:jesse.salinas@yolocounty.org)  
(530) 666-8107

**CAA PRESIDENT**

**Christina Wynn**  
Sacramento County  
[wynnc@saccounty.gov](mailto:wynnc@saccounty.gov)  
(916) 759-0965

### AGENDA

#### October 9 and 10, 2024 Meeting, Pismo Beach, CA

Join Zoom Meeting

<https://us06web.zoom.us/j/83686065616?pwd=mRR4bx6m2ZrjIGvRqcEW8R1aW65fqK.1>

Meeting ID: 836 8606 5616; Passcode: 586655;

Dial by your location • +1 669 444 9171 US

#### Call to Order

- 1) **Roll Call of Committee Members**
- 2) **Approval of Agenda**
- 3) **Approval of minutes from August 7 & 8 Meeting at Palisades**
- 4) **BOE Update/Report:** Report from Lauren Keach, Chief, County-Assessed Property Division of the Board of Equalization (BOE) regarding education matters. Report/letter is attached.
- 5) **Old Business**
  - Discuss proposal from Assessor Jesse Salinas to establish a permanent CAA Leadership Academy Committee. See text of email exchange among CAA President Wynn and Assessor's Kehoe and Salinas. Responses from Assessor Salinas are in red print.
  - Comment and discussion by Assessor Tom Bordonaro regarding Board of Equalization (BOE) training and development of certified staff. Attached is his letter on this topic dated 9/18/2024 to David Yeung, BOE Deputy Director.
- 6) **New Business - Updates by CAA Affiliate Liaisons**
  - CAASA Liaison: Vince Kehoe
  - Real Property Chiefs Liaison: Laura Avila  
Natural Resources Conference, Sacramento, 10/23-24/2024; Flyer attached.
  - Business Chief's Liaison: Richard Ford
  - CAA-IT Liaison: Peter Aldana
  - CCMA Liaison: Leslie Morgan-Virtual Conference, 10/23-24/2024
- 7) **Additional Information - Non agenda items**
- 8) **Adjourn Meeting**



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Sacramento County  
[wynnnc@saccounty.gov](mailto:wynnnc@saccounty.gov)  
(916) 759-0965

### AGENDA Minutes to be approved

**August 7 & 8, 2024, Meetings at Palisades, CA**

Topic: CAA Committee Meetings: Education, Standards Legislative  
Time: Aug 7, 2024 01:30 PM Pacific Time (US and Canada)

Join Zoom Meeting

<https://calassessor-org.zoom.us/j/85157004936?pwd=XxbblWK5xeEl3Tfrf1mS5Vt5Eq0nhC.1>

Meeting ID: 851 5700 4936 Passcode: 351898

One tap mobile +16694449171,,85157004936#,,,,\*351898# US +16699006833,,85157004936#,,,,\*351898# US (San Jose) Dial by your location • +1 669 444 9171 US • +1 669 900 6833 US (San Jose) • +1 253 205 0468 US • +1 253 215 8782 US (Tacoma) • +1 346 248 7799 US (Houston) • +1 719 359 4580 US • +1 646 931 3860 US • +1 689 278 1000 US • +1 929 436 2866 US (New York) • +1 301 715 8592 US (Washington DC) • +1 305 224 1968 US • +1 309 205 3325 US • +1 312 626 6799 US (Chicago) • +1 360 209 5623 US • +1 386 347 5053 US • +1 507 473 4847 US • +1 564 217 2000 US Meeting ID: 851 5700 4936 Passcode: 351898

### Call to Order at 1:40 pm

- 1) **Roll Call of Committee Members** All members present
- 2) **Approval of Agenda** Moved by Avila, Second by Maynard
- 3) **Approval of minutes:** From April 24-25 Meeting at Monterey Depaul/Salinas
- 4) **BOE Update/Report:** Report by Glenna Schultz regarding BOE related education matters. Copy of the report is attached. Discussion ensued.
- 5) **Old Business**
  - Receive a report from Jim Glickman, MAI of the Sacramento County Assessor's Office regarding the Bureau of Real Estate Appraisers efforts affecting Appraisers and Assessors. This is a follow-up to the presentation made by BRE Chief Angela Jemmott at our April, 2024 meetings in Monterey. Copy of the report is attached.
  - Jesse Salinas to provide 2024 Leadership Academy update and introduce idea of Leadership Academy Committee to coordinate future academy sessions. To be brought to next meeting.
- 6) **New Business - Updates by CAA Affiliate Liaisons**
  - CAASA Liaison: Vince Kehoe – their training schedule for 2024 - is attached.
  - Real Property Chiefs Liaison: Laura Avila – No update
  - Business Chief's Liaison: Richard Ford
  - CAA-IT Liaison: Peter Aldana Next meeting 10/9 and 10/24 at Pismo Beach
  - CCMA Liaison: Leslie Morgan – No update
- 7) **Additional Information - Non agenda items**
- 8) **Adjourn Meeting** at 2:20 pm

Discussion regarding the future of the Leadership Academy will take place at the CAA meeting in October at Pismo Beach.





STATE BOARD OF EQUALIZATION

PROPERTY TAX DEPARTMENT

PO BOX 942879, SACRAMENTO, CALIFORNIA 94279-0064

1-916-274-3350 • FAX 1-916-285-0134

[www.boe.ca.gov](http://www.boe.ca.gov)

TED GAINES  
First District, Sacramento

SALLY J. LIEBER  
Second District, San Francisco

ANTONIO VAZQUEZ  
Third District, Santa Monica

MIKE SCHAEFER  
Fourth District, San Diego

MALIA M. COHEN  
State Controller

YVETTE M. STOWERS  
Executive Director

October 1, 2024

Honorable Vincent P. Kehoe, Chair  
California Assessors' Association Education Committee  
P O Box 35  
Mariposa, CA 95338

Dear Mr. Kehoe:

In preparation for the California Assessors' Association (CAA) Education Committee meeting to be held on October 9, 2024, the following information is provided regarding various educational matters where the State Board of Equalization (BOE) staff have been involved.

BOE staff set the training schedule for the 2024-25 fiscal year, providing both in-person and virtual learning classes. We scheduled 3 workshops and 31 courses, consisting of multiple sessions for 11 different classes. In addition, 8 courses have been scheduled in Orange, Sacramento, and Yolo Counties for their own staff utilizing county instructors.

***Training and Certification – Appraisers***

Since the last CAA Education Committee meeting in August 2024, we have completed the following classes:

- Course 52, *Valuation of Restricted Lands*
  - August 12-16, 2024, Microsoft Teams, by BOE staff
- Course 56, *Advanced Sales Comparison and Income Capitalization Approaches*
  - August 19-23, 2024, Microsoft Teams, by BOE staff
- Course 3, *Residential Appraisal Procedures*
  - August 26-30, 2024, In Person (San Bernardino), by BOE staff
- Course 2A, *Replacement Cost Estimating of Residential Structures*
  - September 9-13, 2024, Microsoft Teams, by BOE staff
- Course 3, *Residential Appraisal Procedures*
  - September 16-20, 2024, Microsoft Teams, by BOE staff
- Course 5, *Income Approach to Value*
  - September 23-27, 2024, In Person (Sacramento), by BOE staff

In addition, the following courses were taught by county staff for their own staff:

- Orange County taught Course 2A, *Replacement Cost Estimating of Residential Structures*, on September 9-13, 2024.

- Yolo County taught Course 5, *Income Approach to Value*, on September 9-13, 2024.
- Santa Clara County taught Course 120, *Investment Mathematics & Financial Calculators*, on September 16-20, 2024.
- Sacramento County taught Course 5, *Income Approach to Value*, on September 30-October 4, 2024.

Please note, we continually strive to update and modernize our course material. We welcome feedback and critique if specific content needs improvement or if any errors are noted in the material so we can promptly address it.

### ***Training and Certification – Course Updates***

We will be offering an increase in course capacity as a trial for Course 3 – Residential Appraiser Procedures, to be held virtually November 4 – November 8. The 29 students on the waitlist have been admitted, increasing the total student capacity for the course from 40 to 69 students. Upon completion, we will evaluate the results to determine if this option could be offered for more courses to help us meet the student demand.

We are also sending out a County Assessors Only Letter to request qualified county instructors to teach BOE courses in an effort to expand the quantity of course offerings.

### ***Projects: Self-Study Electronic Submission & Self-Paced Courses***

BOE staff continues to work on the project of converting the 46 self-studies to electronic format. Students will be able to complete and submit the self-study electronically. We will continue to offer the existing format of submitting the document for grading. Currently, we have three online exams undergoing the internal review process and will continue to work through the remaining.

For self-paced online courses, Course 5, *Income Approach to Value* is available on our website to complete for credit at any time. We are investigating technology platforms and working with our technical support team to convert more classes to video and online formats.

Additional training is available on BOE's website at the following links:

- Appraiser/Auditor Appraiser Training: <https://www.boe.ca.gov/proptaxes/castraining.htm>
- Assessment Analyst Training: <https://www.boe.ca.gov/proptaxes/assessmentanalyst.htm>



For more information on continuing education opportunities provided and/or accepted by the BOE, please contact the BOE's training coordinator by email at [Appraiser.Training@boe.ca.gov](mailto:Appraiser.Training@boe.ca.gov) or by telephone at 1-916-274-3350.

Sincerely,



Lauren Keach, Chief  
County-Assessed Properties Division  
Property Tax Department

LK/gs

cc: Honorable Christina Wynn, President  
California Assessors' Association

Ms. Yvette M. Stowers, Executive Director  
Mr. David Yeung, Deputy Director

**From:** Wynn. Christina <[WynnC@saccounty.gov](mailto:WynnC@saccounty.gov)>  
**Sent:** Monday, June 17, 2024 11:03 AM  
**To:** Vincent P. Kehoe <[vkehoe@mariposacounty.org](mailto:vkehoe@mariposacounty.org)>  
**Subject:** RE: Call for Agenda Items - June 20th Exec Meeting

Hi Vince,

I believe that Jesse should submit a formal proposal/action item for consideration by the Executive Committee at an upcoming conference. The details of the committee make-up and responsibilities can be included in the proposal.

I am proposing a permanent Education subcommittee called the Leadership Development Committee. The subcommittee should be chaired by a Leadership Academy alum. Although any interested members can join the subcommittee, I would like to see us encourage the participation of alums onto this committee along with any Assessor interested in joining the subcommittee. If they like, subcommittee members can also join the Education Committee, but I don't think it should be required. (What do you think, Vince?)

Is he proposing the creation of a more permanent Education subcommittee or a temporary ad hoc subcommittee? I would assume this would be a permanent subcommittee. What is CAA role compared to Recorders, Clerks and Elections?

I will be asking CRAC and CACEO to also establish a Leadership Development Subcommittee. The purpose these members will be to help promote the program moving forward, review applications and make recommendations on attendees after such an application review and help determine possible changes to the program moving forward over time.

Subcommittee assignments are made each year by the Chair (Education) or as specified by the bylaws/policies (as you described – regions etc.). As far as timing, if this proposal is passed, the new subcommittee would be effective January 2025. Yes, I would like to see this in the bylaws so that it can take effect in 2025 so this group can participate in the application review process next year and in the planning meetings.

Some questions: How realistic will it be to transfer running this academy to a subcommittee?

I plan to stay connected to the program over the next few years to make sure there is a smooth transition.

How much time commitment is needed and how much knowledge about such educational academies?

As mentioned previously, I will be playing a major role in the transition process and will help train subcommittee members on the process and steps need to make the Leadership Academy a success.

Can we find CAA members to take this responsibility on in future years?

Yes, I believe we can get alums to take on this responsibility given their very positive experience and feedback regarding both cohort 1 & 2.

What about the other organizations that are involved – Recorders, Elections, and Clerks, can they take on the lead responsibilities for organizing this academy etc.? This really needs to be a joint effort so all buy-in and not just one association. In the past when it was just the CAA only leadership academy it lost steam given the full responsibility. My belief is that this

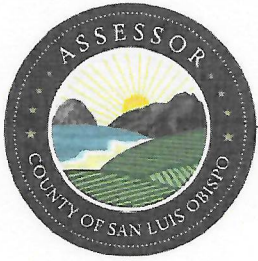
join effort will allow for long term stability since we only need to fill 10 slots and not 30 each year. In fact, if the demand grows to two cohorts, 20 per association each year is much easier than 30. Lastly, we may want to make that second cohort an Exec Leadership program given feedback and interested I have heard from new Assessors. Something for us to consider if there is interest to build more in the future.

Can you discuss this further with Jesse and if feasible plan to put something together for the August or October conference?

Thank you,

*Christina*





## Office of Tom J. Bordonaro, Jr., County Assessor

1055 Monterey Street, Suite D360, San Luis Obispo, CA 93408  
(805) 781-5643 Fax: (805) 781-5641 Website: [slocounty.ca.gov/assessor](http://slocounty.ca.gov/assessor)

September 18, 2024

David Yeung  
State Board of Equalization  
PO Box 942879  
Sacramento, CA 94279

Dear David:

I would like to take this opportunity to share my concerns regarding Board of Equalization (BOE) training and development of certified staff within my office. During the recent NCAA conference at Olympic Village, other assessors shared the same issues I am outlining here. As always, I am seeking a good outcome to the training problems by also proposing possible solutions that I respectfully request be considered on an urgency basis.

There are four problems with existing BOE training practices;

1. Limited enrollment opportunities. There are currently not enough course offerings to adequately provide continuing education;
2. Outdated and invalid course materials;
3. Lack of BOE approved instructors;
4. Self-enroll by staff in necessary courses is not being allowed.

For each of these problems, I offer the following as possible solutions:

***Limited enrollment opportunities solutions:***

It is understood that in-person courses need to be limited on the number of participants. However, courses presented in an online forum have the capacity to allow for significantly greater attendance. My understanding is there is a fifty-student limit for online instruction. Solutions include increasing the number allowed in each online course, or providing a second "tier" of attendance. This group would be allowed to audit the course, receive training credit, and take a proctored exam in each respective county.

Another possible solution would be video recording of high demand classes to be offered at regularly scheduled intervals. Recorded courses would promote consistent content delivery and ensure materials are presented at a set pace (instead of courses ending early/running late). Another benefit of recorded courses is the ability of student to view (and possibly review) the material at their own pace, providing students a better opportunity to grasp key concepts. As a safeguard against shared/group viewing of materials, a unique license with a fixed end date could be integrated into the release of course materials.

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*The Assessor and staff seek excellence in providing information, services, and accurate property assessments through our personal commitment to integrity, mutual respect, and teamwork.*



***Outdated and invalid course content solutions:***

I have received feedback regarding incorrect and outdated BOE course materials. BOE provided material should be reviewed on a regular basis to assure that instructional materials are up-to-date and accurate.

***Lack of BOE Instructors solutions:***

Lack of BOE certified instructors is a serious concern. I do not understand why recertification of an instructor offered through my office has not been approved, even after more than one year of effort. The reasons for this instructor not being approved have been stated in BOE emails, but fail to address the statewide need for instructors, the 30 years of assessment experience of this individual, and the fact that they have previously taught BOE courses. The problem is not limited to this one instructor; additional qualified instructors should be actively solicited throughout the state.

I endorse BOE efforts to provide only high quality, knowledgeable instructors. A solution is to review and update certification requirements in an effort to expand current (and former) assessor's office staff to become certified instructors. Utilizing assessor's office staff as training instructors will provide for a more comprehensive training experience, as staff can provide their "real world" insight and perspective on course material.

***BOE course enrollment solutions:***

An additional problem is that county staff are experiencing issues enrolling in BOE courses due to high demand.

My office has a full-time training coordinator to enroll staff in BOE courses. The current BOE registration interface only allows one person to be enrolled at any given time. By enrolling only one person at a time, the training coordinator loses valuable time to other individuals who are attempting to enroll in the same class. An additional consequence is that cohorts of appraisers are taking BOE courses at different times/years, creating a disparate learning experience.

As an alternative, we attempted to have the appraisers self-register for BOE courses. This led to an unfortunate situation where appraisers with less experience enrolled in a course while appraisers with more experience and years of service were not able to enroll due to the course being at capacity.

A possible solution would be to allow registered training coordinators the ability to enroll multiple students simultaneously, up to the county cap (currently six students per county). Training coordinators would need to register with the BOE in order to gain this capability, as opposed to individual registrants. To further increase efficiency, training coordinators could reserve a certain number of slots at registration, and then add staff names prior to the start of the class. This would ensure the appropriate staff are enrolled, versus the current 'first in, first enrolled' system.

Limited course offerings has resulted in competition to enroll staff. My staff have expressed frustration with not being able to enroll in courses due to limited availability. This has impaired their ability to learn appraisal techniques and methodologies essential for career enhancement.

Thank you for the opportunity for share these concerns. I am available should you or your staff have any questions or additional information regarding any of the concerns or solutions mentioned here.

Sincerely,

A handwritten signature in black ink, appearing to read "Tom J. Bordonaro, Jr.", written in a cursive style.

Tom J. Bordonaro, Jr.  
County Assessor

cc: Christina Wynn, President, CAA  
Jeffrey Prang, President-elect, CAA  
Vincent Kehoe, Chair, Education Committee, CAA



# 2024 NATURAL RESOURCES CONFERENCE

October 23-24, 2024

Located at:  
Sacramento County Assessor's Office  
3636 American River Dr #200  
Arden-Arcade, CA 95864

Join us for the 2024 Natural Resources Conference, a key event for California assessors and their teams! This year, we'll dive into the complexities of assessing a diverse range of natural resources vital to our state's economy and environment. Explore the intricacies of valuing geothermal resources, mines, oil and gas reserves, wind and solar energy projects, battery storage, and more. Gain valuable insights into best practices, emerging trends, and innovative technologies shaping property assessments and taxation. Don't miss this opportunity to enhance your expertise and network with fellow appraisers dedicated to mastering these challenging properties.

Registration is \$30 per participant and includes morning and afternoon snacks, a box lunch on day one, and morning snacks on day two. The conference runs from 8:30 am to 5:00 pm on the first day and from 8:30 am to noon on the second day. We will have a maximum of 50 attendees, so get your registration in quickly to save your spot.

**Registration Link:** <https://forms.office.com/g/Rce4DqYQma>

Registration deadline: Wednesday, October 2, 2024

Make checks payable to:  
Petroleum Standards Advisory Committee

Mail to:  
Kern County Assessor's Office  
Attn: Heather Bullard  
1115 Truxtun Ave  
Bakersfield CA, 93301

This conference will be conducted in a roundtable style, so we need your topics and questions! Please send your agenda items to Heather Bullard at [bullardh@kerncounty.com](mailto:bullardh@kerncounty.com). The more topics we receive, the better the conference will be.

For Questions contact: [bullardh@kerncounty.com](mailto:bullardh@kerncounty.com)



# LIST OF HOTELS IN SACRAMENTO

**Comfort inn and Suites Sacramento**, 21 Howe Ave (Government Rate)

1 King \$128.00 or 2 Queen \$137.00

[Hotel in Sacramento, CA | Comfort Inn® Official Site | Comfort Inn & Suites Sacramento - University Area \(choicehotels.com\)](#)

**Hampton Inn & Suites**, 1875 65<sup>th</sup> St (Government Rate)

2 Queen or 1 King with fridge \$150.00

[Hampton Inn & Suites Sacramento California State University \(hilton.com\)](#)

**Quality Inn**, 818 15<sup>th</sup> St. (Government Rate)

1 King or 1 Queen \$160.00 / 2 Queen \$165

[Hotel in Sacramento, CA | Quality Inn® Official Site | Quality Inn Sacramento Convention Center \(choicehotels.com\)](#)

**Hilton Sacramento Arden West** 2200 Harvard St (Government Rate) (Breakfast not included)

2 Queen \$151.00

[Available Rooms - Hilton Sacramento Arden West](#)

**Courtyard by Marriott Sacramento Cal Expo** 1782 Tribute Rd (Government Rate) (Breakfast not included)

1 King or 2 Queen \$145.00

[Courtyard Sacramento Cal Expo - Near California State Capitol \(marriott.com\)](#)

**TownePlace Suites** 1784 Tribute Rd (Government Rates)

1 Queen \$145.00 or 2 Queen \$155.00

[Sacramento Hotels | TownePlace Suites Sacramento Cal Expo \(marriott.com\)](#)