



CALIFORNIA ASSESSORS' ASSOCIATION LEGISLATIVE COMMITTEE

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CAA Legislative Committee Meeting (Hybrid)

Wednesday, April 23, 2025

Immediately following Standards Committee meeting

Napa Valley Marriot Hotel, 3425 Solano Avenue, Napa, CA

Zoom link:

<https://us06web.zoom.us/j/84931742686?pwd=bS28eWvaslAPtGk4SJW7Mbehqb4q9.1>

Meeting ID: 849 3174 2686

Passcode: 772901

Dial by your location

+1 669 444 9171

***indicates attachment**

AGENDA

- | | |
|---|----------------|
| 1. Call to Order | Torres |
| 2. Roll Call | Camacho |
| 3. Adopt Agenda | Torres |
| 4. Approval of Draft Minutes: April 17, 2025* | Torres |
| 5. 2025 Bills (discussion and possible action items) | Torres |

Bills of interest

- SB 603 (Niello) – Los Angeles
- SB 336 (Wiener) – Santa Clara
- AB 317 (Jackson) – Santa Clara
- SB 56 (Seyarto) – San Diego
- SB 710 (Blakespear) – San Luis Obispo
- SB 566 (Grove) – Tuolumne

Other bills on the tracking chart

- | |
|---|
| 6. Announcements/Good of the Order |
| 7. Adjournment |



Legislative Committee Meeting Draft Minutes

Date: Thursday, April 17, 2025, 9:30AM

Location: Zoom meeting online

1. Call to Order

Chair Joaquín Torress called the meeting to order at 9:32 am.

2. Roll call of Legislative Committee Members

Vice Chair Marina Camacho conducted roll call.

Present:

- **Joaquin Torres** (Chair, City and County of San Francisco)
- **Marina Camacho** (Vice Chair, Monterey)
- **Shelly Scott** (Marin)
- **Tom Bordonaro, Jr.** (San Luis Obispo)
- **Leslie Morgan** (Shasta)
- **Kaenan Whitman** (Tuolumne)
- **Jeffrey Prang** (Association President, Los Angeles)

A quorum was established.

Absent:

- **Phong La** (Alameda)
- **Lawrence E. Stone** (Santa Clara)
- **Jordan Marks** (San Diego) (joined later)

3. Adoption of Agenda by consent

4. Adoption of Minutes – March 30, 2025 and April 3, 2025

- **Motion to adopt:** Tom Bordonaro, Jr. (San Luis Obispo)
- **Seconded by:** Shelly Scott (Marin)
- **Outcome:** Motion carried.

5. 2025 Bills of Interest

AB 1253 (Schultz, Substantial Equivalency for 2025 Fires in LA and Ventura Counties)

- **Motion to Oppose:** Tom Bordonaro, Jr. (San Luis Obispo)
- **Seconded by:** Shelly Scott (Marin)
- **Outcome:** Motion carried.

AB 1253, a gut and amend bill by Assembly member Nick Schultz, authorizes assessors to deem a reconstructed property “substantially equivalent” for assessment purposes if it complies with the state or local rebuild standards as provided by Governors and local government’s executive orders. The standards may exceed prior size and height limits, in this case by no more than 110%. In such cases, these properties may be excluded from “new construction” under Revenue and Taxation Code Section 70.

This bill aligns tax assessment practices with recovery efforts for homeowners affected by the 2025 fires in Palisades, Eaton, Hurst, Lidia, Sunset, or Woodle.

AB 1337 (Ward, Information Practices Act of 1977)

- **Motion to Oppose:** Tom Bordonaro, Jr. (San Luis Obispo)
- **Seconded by:** Kaenan Whitman (Tuolumne)
- **Outcome:** Motion carried.

This bill proposes updates to the Information Practices Act (IPA) of 1977, which governs how public entities collect, maintain, and use personal information. Currently, the IPA applies to state agencies; this bill would expand those requirements to include local agencies as well.

Key provisions of the IPA include:

- Agencies may only collect personal information that is relevant and necessary for a legitimate purpose.
- Agencies must inform individuals about the purpose of the data collection, how the information will be used, with whom it may be shared, and the consequences of not providing it.
- Individuals have the right to review records held about them.
- Individuals can request corrections to inaccurate or outdated information.
- Agencies generally may not share or sell personal data to third parties without consent or legal authorization.

Counties have expressed concerns that the bill may conflict with existing laws governing county assessors. For example, assessors are required to make public certain data such as the assessment roll and the two-year property transfer list.

Additional concerns were raised about limitations on sharing property ownership data with other agencies. For instance, the Office of Supportive Housing in Santa Clara County requests up to 15,000 ownership verifications per year to support code enforcement and other services.

Assessor Torres and Rob will request a meeting with the bill’s author and sponsors to discuss these concerns before submitting a formal opposition letter, pending approval by the Board of Directors.

AB 317 (Jackson, California First Time Homeowner Dream Act)

This bill proposes a tax deferral for builders who build single family residences to be sold under \$400,000 and intended for first-time home buyers and intended not to be occupied by developers. The tax would be deferred until it's sold. The financial benefit is for the developers, not passing property tax savings to the buyer.

The bill relies on self-certification by the developer. The bill would require assessors to confirm eligibility based on developer projections, such as intended sale price under \$400,000 and sale to a first-time homebuyer.

Assessors requested more time to review the bill and its impacts before taking action.

SB 592 (Smallwood-Cuevas, Reassessment Exclusions, Cooperatives and Community Land Trusts)

The author's office and sponsor asked for the association's feedback to their amendments.

San Luis Obispo team provided the **following response**, which the committee approved to be shared with CLT:

1. They still are using R&T 2188.7 as the authority for us to set up separate assessments, which I do not think works for us very well (if at all).
2. Section (d)(1) still does not make any sense.

(d) (1) If the transfer of a real property has been excluded from a change in ownership pursuant to paragraph (1) of subdivision (a) and the real property has not been converted to an entity in accordance with subdivision (a), or if the entity has not fulfilled the requisite tenant participation requirements of this section, then the transfer shall be a change in ownership of the real property unless the transfer is for the purpose of converting the ownership of the property to ownership by a nonprofit corporation or limited-equity housing cooperative or is otherwise excluded from change in ownership by Section 62, 62.1, 62.2, 63, 63.1, 63.2, or 64.

If the transfer was excluded, it is only because they MET AND QUALIFIED under (a)(1)(A). How can it both qualify, but not meet the requirements? However, if it somehow both met but didn't meet the requirements, then it is a CIO unless the transfer is for the purpose "of converting the ownership of the property to ownership by a nonprofit corporation or limited-equity housing cooperative." If it was excluded, it is already a limited-equity stock cooperative, but it would appear in this case it does not need to meet the 51% requirement. Also, there is no limitation on the "nonprofit corporation." No 51% requirement, no requirement that it be an entity for housing, nor that it qualify for the welfare exemption, just that it be a nonprofit corporation.

3. As mentioned previously, key language was left out of the paragraph. Without the language, it does not specifically authorize transfers of unit/ownership interests to be reassessed after the 3 years, although they do require reporting and PCOR's. (Not sure what good they will do if we are not authorized to do anything with them.) Nor do the R&T codes referenced at the end of the paragraph make any sense.

62.1(b)(1) states:

(b) (1) If the transfer of a mobilehome park has been excluded from a change in ownership pursuant to paragraph (1) of subdivision (a) and the park has not been converted to condominium, stock cooperative ownership, or limited equity cooperative ownership, any transfer on or after January 1, 1989, of shares of the voting stock of, or other ownership or membership interests in, the entity that acquired the park in accordance with paragraph (1) of subdivision (a) shall be a change in ownership of a pro rata portion of the real property of the park unless the transfer is for the purpose of converting the park to condominium, stock cooperative ownership, or limited equity cooperative ownership or is excluded from change in ownership by Section 62, 63, 63.1, or 63.2.

Compare that to 62.1.1(d)(1):

(d)(1) If the transfer of a real property has been excluded from a change in ownership pursuant to paragraph (1) of subdivision (a) and the real property has not been converted to an entity in accordance with subdivision (a), or if the entity has not fulfilled the requisite tenant participation requirements of this section, then the transfer shall be a change in ownership of the real property unless the transfer is for the purpose of converting the ownership of the property to ownership by a nonprofit corporation or limited-equity housing cooperative or is otherwise excluded from change in ownership by Section 62, 62.1, 62.2, 63, 63.1, 63.2, or 64.

6. Announcements/Good of the Order

Reminder that next week, the committee will focus on the bills set for Revenue and Taxation hearing during the week of May 14. Bills: SB 710, SB 336, SB 566, SB 603, SB 723.

San Luis Obispo is working with author and committee staff to amend Senate Bill 710 – Blakespear that would cap the exclusion based on megawatt produced. This would clarify the exclusion being limited to a vague term of “customer-sited.”

7. Adjournment.

The meeting was adjourned at 10:43 AM

County Assigned	Bill	Author	Recommendation	CAA Position	Hearing date	Subject
Alameda	SB 9	Arreguin, Jesse	Neutral (3/20)		April 22, 2025	Accessory Dwelling Unit: owner-occupied requirements
Alameda	SB 63	Wiener, Scott; Arreguin, Jesse	Neutral (3/20)		April 22, 2025	Bay Area, local revenue measure, transportation funding
Alameda	SB 723	Choi, Steven	Neutral (3/20)		May 14, 2025	Exemption: low-value exemption
Alameda Los Angeles San Luis Obispo Santa Clara	SB 592	Smallwood-Cuervas, Lola	Oppose	Oppose (4/3)	April 23, 2025	Property tax: change in ownership exclusions: residential rental property. CLT, cooperatives
Los Angeles	AB 245	Gipson, Mike	Watch	Support (4/3)	April 7, 2025	Property taxation: disaster victims
Los Angeles	AB 613	Gonzalez, Mark	Oppose	Oppose (4/3)	April 7, 2025	Property taxation: affordable commercial property
Los Angeles	SB 663	Allen, Ben, McNERNEY, and Perez	Support (3/20)	Support (3/20)	April 21, 2025	Winter Fires of 2025: real property tax: exemptions and reassessment
Los Angeles	AB 796	Lowenthal, Josh	Drop (4/17)		April 22, 2025	Social Media Platforms: advertising tax
Los Angeles	SB 255	Seyarto, Kelly	Watch (3/20)		April 22, 2025	County recorders: notification
Los Angeles	AB 62	McKinnor, Tina	Neutral		April 29, 2025	Racially motivated eminent domain
Los Angeles	SB 603	Niello, Roger	Support		May 14, 2025	Property taxation: transfer of base year value: disaster relief
Los Angeles	SB 293	Perez, Sasha	Watch (3/20)			Property taxation: County of Los Angeles: fire victims
Los Angeles	SB 288	Seyarto, Kelly	Watch (3/20)			Property tax: tax-defaulted property sales: sales to public agencies
Los Angeles	SB 573	Smallwood-Cuervas, Lola	Drop (4/17)			Property taxation: cancellation.
Los Angeles	AB 1253	Shultz, Nick	Support			Real property, substantial equivalence
Los Angeles San Diego	SB 23	Valladares, Suzette	Watch		April 28, 2025	Property taxation: exemption: disabled veterans, homeowners
Marin	AB 1485	Macedo, Alexandra	Neutral	Support (4/3)	April 7, 2025	Real property tax: documentary transfer tax: exemptions: Native American tribes.
Monterey	SB 299	Cabaldon, Christopher			April 23, 2025	Local government: ordinances
Monterey San Diego	SB 729	Limon, Monique			April 21, 2025	Williamson Act: agricultural preserves
San Diego	SB 296	Archuleta, Bob	Support	Support (3/20)	April 28, 2025	Property taxation: exemption: disabled veteran homeowners
San Diego	SB 56	Seyarto, Kelly	Support		April 28, 2025	Property taxation: disabled veterans' exemption: household income
San Diego	SB 284	Seyarto, Kelly			May 14, 2025	Property taxation: veterans' exemption
San Diego	SB 623	Archuleta, Bob	Support			Homeowners', veterans', and disabled veterans' exemptions
San Diego	SCA 4	Archuleta, Bob	Support			Property taxation: veterans' exemption

County Assigned	Bill	Author	Recommendation	CAA Position	Hearing date	Subject
San Diego	ACA 5	Schiavo, Pilar	Support			Property taxation: veterans' exemption
San Diego Santa Clara	AB 76	Alvarez, David	Drop		ASM Local Gov't, April 9, 2025	Surplus land: exempt surplus land: sectional planning area
San Luis Obispo	AB 1516	Committee on Rev and Tax	Support	Support (4/3)	April 21, 2025	Real property taxation
San Luis Obispo	AB 21	DeMaio, Carl	Watch		April 24, 2025	Taxpayer Protection Act of 2025
San Luis Obispo	SB 710	Blakespear, Catherine	Neutral, if amended		May 14, 2025	Active solar energy systems: extension
Santa Clara	AB 1416	Ta, Tri			March 24, 2025	Property taxation: redemption: permanent installment plan
Santa Clara	AB 317	Jackson, Corey	Oppose		April 21, 2025	California First Time Homeowner Dream Act
Santa Clara	SB 336	Wiener, Scott	Watch, with concerns		May 14, 2025	Real property tax: welfare exemption: moderate-income housing
Santa Clara Los Angeles	AB 418	Wilson, Lori	LA recommends Neutral		April 9, 2025	Property taxation: tax-defaulted property
Shasta	AB 883	Lowenthal, Josh	Watch (3/20)		March 24, 2025	California Public Records Act
Shasta	AB 343	Pacheco, Blanca	Watch (3/20)		April 9, 2025	Public Records Act. elected or appointed officials
Shasta	SB 5	Cabaldon, Christopher	Watch (3/20)		April 23, 2025	Infrastructure financing districts: allocation of taxes: agricultural land exclusion
Shasta	AB 1156	Wicks, Buffy	Watch (3/20)		April 23, 2025	Agricultural land use: conversion to solar-use easements
Shasta	AB 1337	Ward, Christopher	Oppose			Information Practices Act of 1977
Tuolumne	SB 566	Grove, Shannon	Watch (3/20)		May 14, 2025	Real property tax: Personal Income Tax Law: homeowners' exemption: renter's credit.
Tuolumne	AB 691	Wallis, Greg	Drop (3/20)			Property taxes
	AB 819	Macedo, Alexandra			March 24, 2025	Electric vehicle charging stations
	AB 1517	Committee on Rev and Tax			April 21, 2025	Property taxation: delinquency and penalties: LA County
	AB 75	Calderon, Lisa			May 1, 2025	Residential property insurance images
	AB 698	Wicks, Buffy				Local taxation; real property transfers