



COUNTY OF SAN DIEGO

AGENDA ITEM

BOARD OF SUPERVISORS

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DATE: September 24, 2024

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TO: Board of Supervisors

SUBJECT:

**ASSESSOR/RECORDER/COUNTY CLERK – APPOINTMENT OF JEFFREY OLSON
TO RETIREE REHIRE POSITION (DISTRICTS: ALL)**

OVERVIEW

According to California Government Code section 7522.56, any retired person receiving a pension from a public retirement system shall not be employed by an employer in the same retirement system for a period of 180 days following the date of retirement. There is an exception to this rule when the governing board of a public agency certifies the nature of employment, and that the appointment of the retired person is necessary to fill a critically needed position before the end of the 180-day waiting period.

Today, we recommend the approval of the appointment of Mr. Jeffrey Olson to a retiree/rehire position within the Assessor/Recorder/County Clerk (ARCC) Office. Mr. Olson will be assigned to the Taxpayer Advocate Program within the Assessor Division of ARCC. This program plays a crucial role in providing public education to the community, property owners, and other local government entities within San Diego County. Specifically, the program assists these stakeholders in navigating complex assessment scenarios, such as the Disaster Relief and Navigating Loss programs.

Today's action will approve the temporary employment of Jeffrey Olson within ARCC, to perform work of limited duration and which is critically needed before 180 days have passed since Mr. Olson's retirement date as the vital position will become vacant. Furthermore, Mr. Olson's expertise will continue to be leveraged in highly advanced property assessment work, and he will play a key role in training staff to ensure that the department maintains full functional redundancies.

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RECOMMENDATION(S)
ASSESSOR/RECORDER/COUNTY CLERK AND
CHIEF ADMINISTRATIVE OFFICER

Pursuant to California Government Code section 7522.56 approve the appointment of Jeffrey Olson to a retiree-rehire position as a chief deputy int the Taxpayer Advocate Program for the Assessor/Recorder/County Clerk Office before the 180 days have passed since his retirement date.

EQUITY IMPACT STATEMENT

This recommendation supports the Board of Supervisors’ commitment to racial justice, equity, diversity, and inclusion. By expanding the Taxpayer Advocate Program, we are taking meaningful steps to assist individuals who have historically lacked representation and access to vital resources.

This expansion will enhance our ability to engage with various community groups, including welfare institutions, disabled veterans’ organizations, and small business associations—particularly those that represent diverse backgrounds. The Assessor’s research has shown that while the property tax system is designed to be impartial, disparities in access to representation and information still exist. By strengthening the Taxpayer Advocate Program, we aim to bridge these gaps and ensure that everyone in our community has the support they need.

SUSTAINABILITY IMPACT STATEMENT

The proposed action is in alignment with the County’s strategic initiative to promote economic sustainability for all. It also ensures our ability to respond effectively to the immediate needs of individuals, families, and the broader region. By enhancing the resources and outreach of the Taxpayer Advocate Program, we are strengthening our commitment to supporting the economic well-being of our community, providing crucial assistance where it is most needed, and fostering a more equitable environment for all residents.

FISCAL IMPACT

Funds for this request are included in the Fiscal Year 2024-25 Operational Plan for the Assessor/Recorder/County Clerk Office. If approved, this request will result in estimated costs of \$70.20 per hour for no more than 120 workdays/960 hours for the fiscal year. The funding source is existing General Purpose Revenue. There will be no change in net General Fund cost and no additional staff years.

BUSINESS IMPACT STATEMENT

N/A

ADVISORY BOARD STATEMENT

N/A

BACKGROUND

The San Diego County Assessor/Recorder/County Clerk was the first in the state to establish a dedicated Taxpayer Advocate Program. The Program ensures accuracy and fairness in property assessments, and it provides public education to industry practitioners, taxpayers and other partnered entities. Due to the Assessor’s extensive public outreach and the need to enhance the

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quality of service, the workload for this program has increased. This significant rise in demand necessitates additional support, particularly to assist taxpayers in navigating the complex property tax system. The ideal candidate for this role must not only be compassionate in customer interactions but also possess expertise in property assessment law and appraisal methodologies.

Jeffrey Olson, who has been employed by the Assessor's Office for 35 years, is exceptionally well-qualified for this role. His extensive experience includes expertise in mapping, ownership, property tax exemptions, exclusions from reassessment, disaster relief, and the valuation of residential, commercial, and specialty properties. Mr. Olson also holds an Advanced Appraiser Certificate from the State Board of Equalization, further attesting to his qualifications. He has a unique ability to investigate, diagnose, and explain complex assessment processes to customers. Moreover, his decades of experience with the Assessor's legacy IT systems enable him to troubleshoot issues and develop strategic solutions to assist customers effectively. This level of experience is challenging to replace, and both San Diego County and its citizens would greatly benefit from Mr. Olson's continued service.

The recommended action will allow for effective customer service, public education to the community of San Diego County, and it will allow Mr. Olson to continue assisting the County in building the Financial Forecasting and Bond Ratings, including presentations for the upcoming fiscal years. His 35 years of experience is also pivotal to the accurate forecasting of property tax revenue that impacts the County, cities, schools, and over 1,000 special districts across San Diego County.

Mr. Olson is at normal retirement age and is set to retire October 3, 2024. The Assessor/Recorder/County Clerk anticipates requiring his assistance for at least nine months following his retirement.

The County's Assessor/Recorder/County Clerk certifies that the temporary appointment of Mr. Olson is critically needed to ensure continued public service and to create and maintain redundancies for the future.

LINKAGE TO THE COUNTY OF SAN DIEGO STRATEGIC PLAN

Today's recommended action supports the Community Strategic Initiative in the County of San Diego's 2024-2029 Strategic Plan Initiatives, inspiring civic engagement by providing information, public forums, or other avenues that increase access for individuals or communities to use their voice, their vote, and their experience to impact change. Approval of the recommendation allows the County to develop, maintain, and attract a skilled, adaptable, and diverse workforce dedicated to sustaining operational excellence and serving as enablers of these Strategic Initiatives.

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Respectfully submitted,

A handwritten signature in blue ink, reading "Jordan Z. Marks". The signature is written in a cursive, flowing style.

JORDAN Z. MARKS
Assessor/Recorder/County Clerk

ATTACHMENT(S)
N/A