



County of Santa Clara

Policy Name: Desired Characteristics of Candidates for Appointment to the Assessment Appeals Board and Value Hearing Officers - Board Policy 3.53

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Policy Type: Board

Category: Board Operations **Sub-Category:** Advisory Boards and Commissions

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3.53 DESIRED CHARACTERISTICS OF CANDIDATES FOR APPOINTMENT TO THE ASSESSMENT APPEALS BOARD AND VALUE HEARING OFFICERS (Adopted 1-11-11)

State law defines the minimum qualifications for persons serving on assessment appeals boards and as hearing officers. The County of Santa Clara Ordinance Code provides additional minimum qualifications in the case of hearing officers. Given the complexity of property tax assessment appeals filed in the County, the Board of Supervisors adopts this policy regarding desired characteristics of candidates for appointment to the Assessment Appeals Board (AAB) and Value Hearing Officers.

3.53.1 Appointment of Members to the Assessment Appeals Board

It is the policy of the Board of Supervisors that when considering the appointment of members to the Assessment Appeals Board, Board members may, but shall not be obligated to, give preference to candidates possessing the following background:

- (A) Certified public accountants with experience in the appraisal/valuation of real and/ or business personal property;



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- (B) Licensed real estate brokers with a Certified Commercial Investment Member (CCIM) designation from the CCIM Institute, a Certified Real Estate Brokerage Manager (CRB) designation from the Council of Real Estate Brokerage Managers, a Certified Residential Specialist (CRS) designation from the Council of Residential Specialists, a Graduate Realtor Institute (GRI) designation from the National Association of Realtors, or a similar designation;
- (C) Real property appraisers with the designation of Member Appraisal Institute (MAI) or a similar designation evidencing experience with complex income property valuation;
- (D) Personal property appraisers with an Accredited Senior Appraiser (ASA) designation from the American Society of Appraisers or a similar designation;
- (E) Attorneys with experience with complex income and business property valuation; or
- (F) Individuals having experience which is comparable to that set forth in subsections (A) through (E) above.

In addition, Board members may, but shall not be obligated to, ensure that each separate AAB panel has at least one real property appraiser with the designation of MAI from the Appraisal Institute, or similar designation evidencing experience with complex income property valuation, as well as one experienced Assessment Appeals Board member.

3.53.2 Appointment of Value Hearing Officers

It is the policy of the Board of Supervisors that when considering prospective value hearing officers, Board members may, but shall not be



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obligated to, give preference to candidates possessing the following background:

- (A) Residential real property appraisers with an SRA designation from the Appraisal Institute;
- (B) Residential real property appraisers licensed at the Certified Residential or Certified General level by the State of California Office of Real Estate Appraisers; or
- (C) Individuals having experience which is comparable to that set forth in subsections (A) and (B) above.

In addition, Board members may, but shall not be obligated to, give preference to candidates with prior experience as either a hearing officer or arbitrator

Related Policies

None.

Related Forms and Information

None.

History

Date	Changes Made
1/31/2014	Policy Uploaded. (John Myers)
1/11/2011	Policy Adopted. View legislative file.