

Departmental Racial Equity Progress Report
Annual Report for 2021

Part A

Department name: Assessor-Recorder

Date: 5/2/2022

Reflections from Department Leadership

Racial prejudice and bias continue to corrode the real estate sector and city governments, as they do society at large. This reality—particularly racism evident in real estate and its appraisal—underscores the urgency and importance of promoting a culture of racial equity here at the Office of the Assessor-Recorder (ASR), internally and through our engagement with community.

To do so, our first job is to ensure our work on behalf of the public is demonstrably free of the racial bias and discrimination apparent in the wider real estate sector. Our current core Racial Equity Action Plan focus areas look inward. Our focus includes recruitment, culture, and training. We seek to promote staff diversity through intentional recruitment, retention, and promotion of underrepresented people of color, to strengthen a culture of inclusion and belonging where our diverse identities are welcome and celebrated in the workplace, and to fully develop as an aware and anti-racist organization that creates meaningful and impactful diversity and inclusion opportunities throughout our public service. In addition, I am focused on building capacity to review operational policies and practices for bias and on prioritizing outward facing projects aligned with our Racial Equity Action Plan (REAP).

Promoting Staff Diversity:

In 2021, through the first phase of our REAP, we ensured all staff participating in recruitment and hiring completed training on fairness in hiring and implicit bias to develop bias awareness in our staff, the capacity to mitigate their own bias in the hiring process, and intentionally allow this awareness to inform their day to day interactions with colleagues and the public. We also implemented a new exit interview process and continued to seek approvals to expand our eligible lists to maximize the diversity of our candidate pools.

In 2022, we're committed to going further to implement more complex and challenging goals in this realm of our racial equity plan. Together with the Office of the Controller and the Treasurer & Tax Collector, we've jointly selected a new Racial Equity consultant who will support us in: evaluating our expanded recruitment efforts including our continued work with DHR to obtain and analyze data related to our employee recruitment; reviewing and addressing barriers to recruitment and hiring including minimum qualifications, supplemental questionnaires, and degree requirements; and issuing a follow-up to our October 2021 racial equity climate survey.

Standardizing Policies and Practices:

Over the past year, journalism and subsequent governmental reports have exposed rampant racial bias in the private appraisal market. This racism operates to disadvantage communities of color, particularly Black and Brown families, by substantially and unfairly undervaluing their homes. In response, we have begun asking questions and performing analyses to address any potential for similar racial bias in our operations. This past year we began by completing a Civic Bridge project examining our operational practices for assessing new residential construction. The project team ultimately found that there is not currently sufficiently fine-grained demographic data to reach clear conclusions about potential disparities arising from our work in this area, but the project highlighted an alternative path. By more carefully and thoroughly standardizing our practice in this realm across our entire jurisdiction, we can functionally limit the potential for racial bias to enter the process. We will continue to evaluate our operational portfolio for these opportunities.

Implementing Assembly Bill 1466

On September 28, 2021, California Governor Gavin Newsom signed into law State Assembly Bill 1466 (AB 1466), requiring all county recorders to establish restrictive covenant programs to assist in the redaction of unlawfully restrictive covenants. The law requires each county to prepare an implementation plan to identify unlawfully restrictive covenants among their records, and to redact said covenants. The rate at which counties take up the work beyond producing a plan is left to the discretion of each office.

Our office celebrated passage of AB 1466 as a clear sign from the state of the importance of racial equity in our work. We are now developing an aggressive and comprehensive plan for implementation. We view the project as perfect aligned with our commitment to continuous improvement, public service, and racial equity. With respect to racial equity, I see two clear and concrete benefits: (1) the removal of such offensive and illegal language from our public record and all present and future property transactions, and (2) as a remarkable opportunity for raising awareness through art and civic discourse about the historical fact of this racism and its significant and negative material impacts on present day racial inequity in San Francisco.

Promoting Estate Planning Services:

Beyond our core operations, my aim is to leverage our Office's presence in the community to directly combat inequities stemming from racially discriminatory and de jure government action of law and public policy and its associated impact on private practices in housing. In this vein, our office recently piloted a new program to expand culturally competent estate planning services designed to serve diverse homeowners in majority-minority neighborhoods, including free services for low-income households. This new program represents a 10x increase in the number of households previously served by our community-based partners. Our goal is to continue to grow the program to help address disparities in estate planning that result in BIPOC San Franciscans incurring higher probate fees, higher risks of losing ownership of real property and financial and legal barriers that prevent the expansion of intergenerational wealth among lower income communities of color.

Realizing a more inclusive and equitable future for those we serve requires our sector, both public and private, that values the most precious and hard-won assets for many individuals and families, to take every opportunity to face, understand and address the present and past practices and government policy that have created the systems of socioeconomic and residential segregation whose effects we still live with today. It is our responsibility, as we seek to live most fully in this present moment of racial reckoning, to embrace these efforts of both practical and symbolic significance, nurture internal and external cultures of change and cultivate spaces within our office and in community for understanding, healing, and inclusion.

Please describe your engagement to date with your Racial Equity Leaders. What specific types of support are you providing your Racial Equity Leaders and other employees doing this work?

My engagement has included participating in meetings and articulating my full support for realizing this work. I continue to articulate the importance of advancing our racial equity action plan with our leadership, communicating my support of our racial equity efforts with the department, adding positions to the budget, ensuring budget for trainings, hiring a racial equity consultant to inform our work, expanding external programming aligned with our racial equity goals, such as our digital Family Wealth Series and new Estate Planning program and providing staff to participate on the team.

Acknowledged by [name] and [title], [date], [signature]

Joaquin Torres
Assessor-Recorder
5/2/2022

A handwritten signature in black ink, appearing to read 'JT' followed by a stylized flourish.

1. Hiring and Recruitment

Goals and performance measures

- Department Goal: The Department will put processes in place to increase the number of underrepresented people of color (specifically those that identify as Black and Latinx) who apply to Department positions and are subsequently hired. We will break down the barriers that keep BIPOC people from applying to opportunities within the Department and ensure everyone is able to showcase their talents and skills in a meaningful way.
- Performance Measures:
 - Increase in the number of BIPOC candidates applying for ASR positions
 - Increase in the number of BIPOC staff hired
 - Increase in the number of staff responding to the next All Staff Racial Equity Survey
 - Successfully host summer interns to expand career options for students of color
 - Create a hiring and recruitment policy and procedure that aligns with the Citywide Racial Equity Framework
 - Implement racial equity training for all staff
 - All hiring panels will be comprised of various ethnic and gender
 - Provide transparency around the demographics of the department including current employees, new hires and promotions.

Changes implemented over the 2021 calendar year

If relevant, include action numbers from the RE Action Plan.

- 1.1.1 Analyzed 5 years of historical data on ASR Recruitments. From that analysis we learned that applicants from Black and Hispanic groups comprised the lowest number of applications received over the 5-year span. In an effort to increase the number of Black and Hispanic applicants, the Department expanded its recruitment outreach efforts to local schools and universities, as well as community-based organizations to target more BIPOC candidates.
- 1.2.2 ASR HR expanded its list of recruitment contacts to include local schools and universities, as well as community-based organizations, and now have a list of over 300 outreach resources. All of the contacts are sent information about upcoming ASR job openings.
- 1.3.1 Worked with the Mayor's Opportunities for All program to hire two summer interns.
- 1.3.4 Racial Equity Core Team presented the Racial Equity Action Plan to Department Managers in December 23, 2020 and to All Staff on January 4, 2021 via the Department's monthly HR newsletter.
- 1.4.1 ASR reviewed its hiring and recruitment processes to ensure that the interview process is standardized across all recruitments
- 1.4.5 All ASR job postings were shared internally.
- 1.4.3 equity training: The Department required new supervisors, managers, and hiring managers, as well as staff who were involved with recruitment interviews or selection processes to take Fairness in Hiring Training. Additionally, as part of Citywide trainings

requirements, all ASR staff who were in positions that lead, supervise or manage were required to take Implicit Bias in 2021.

- 1.4.7 ASR reviewed the onboarding and offboarding process. The onboarding process is standardized for all new recruitments. ASR HR created a new exit interview process which gives all employees leaving the department an opportunity to comment on their experience at ASR and provide feedback. The exit interview survey was sent to 10 employees and completed by 4 employees. The feedback will be aggregated and shared with Leadership on a quarterly basis to address any potential recruitment issues or concerns.
- 1.4.8 ASR proactively requests for an expanded certification rule for all PCS recruitments, especially for entry-level positions, to allow the Department to tap into more ranks on an eligible list, which increases the probability of having a more diverse candidate pool. ASR was successful in its request to expand the certification rule from 3 to 10 for three recruitments in 2021 (1824, 4213, and 4215).

Priority actions for 2022 calendar year, including opportunities for staff input and decision-making *If relevant, include action item numbers from the RE Action Plan. Please also highlight any major revisions made to RE Action Plan since first submission.*

- In January 2022, the Assessor-Recorder, Treasurer & Tax Collector and Controller concluded a 9 month joint RFP process to select a Racial Equity Consultant. The Department expects to award the contract by March 2022 so that we can continue implementing the more complex and challenging goals of the racial equity plan. These actions include convening working groups to review and provide feedback on the following objectives:
 - 1.1.1 remove barriers to applying to positions within the department.
 - 1.1.3 review the equitable recruitment & hiring policy and provide feedback
 - 1.2.3 understand whether Minimum Qualifications, Supplemental Questionnaires or Degree Inflation are barriers to entry for ASR positions.
 - 1.1.2 Issue a new racial equity climate survey to follow-up on the survey issued in October 2021
 - 1.2.1 Track employee recruitment efforts to see if there have been any changes in who is applying for ASR positions due to expanded outreach efforts. To-date , we have not been able to obtain this data from the new Applicant Tracking System and will continue to work with DHR to obtain and analyze the data.
- 1.3.1 ASR plans to host interns again during the summer of 2022 with an aim to host two BIPOC juniors and or/seniors.

2. Retention and Promotion

Goals and performance measures

- Department Goal: The Department will actively work towards creating a culture where staff, specifically underrepresented staff, feel valued and have career paths and opportunities for growth, development, and promotion in the department.
- Performance Measures:
 - Increase in the number of underrepresented people of color in the Department
 - Increase in the number of underrepresented people of color who are promoted
 - Ensure step placements for new staff are equitable and that certain demographic groups are not placed at a higher or lower step at disproportional rates

Changes implemented over the 2021 calendar year

If relevant, include action numbers from the RE Action Plan.

- 2.1.1 - ASR deployed 8 staff members as DSW Managers at the EOC, Case investigators, and Contract tracers. The demographics of the 8 DSW workers were 3-Asian (2 female & 1 male), 2-Hispanic (female and male), and 3-White (female).
- 2.1.2 Finance team conducted budget analysis and acquired funding for racial equity training and the Equity Professional Development program in the annual budget.
- 2.1.4 ASR HR worked diligently to update the Department's COVID related policies and procedures which impacted all staff equitably including any DSWs. ASR HR sent out frequent notices about COVID leaves, vaccination and masking requirements to all staff.
- 2.2.1 ASR currently determines and will continue to determine salary placements based on experience rather than past income, which has had an adverse impact and inequity towards women and BIPOC.
- 2.2.2 ASR currently provides and will continue to explore and provide additional employee benefits within the Department's authority, such as expansion of telework, alternate work schedules, and extended leaves to all staff, regardless of position, gender, age, or race.
- 2.4.1 The HR Team conducted an analysis to assess what salary step ASR is placing employees on within each job classification at the time of hire and/or promotion. The analysis reinforced the need to offer salary and benefits to new employees based on their work experience, and not their previous salary, which can adversely impact women and BIPOC. Language was added in conditional offer letters, that gives the prospective new hires a way to initiate a conversation regarding salary determinations made by the Department, which women and BIPOC do not typically do due to social and/or cultural upbringing.

Priority actions for 2022 calendar year, including opportunities for staff input and decision-making
If relevant, include action item numbers from the RE Action Plan. Please also highlight any major revisions made to RE Action Plan since first submission.

- 2.2.3 PTO policy will be reviewed and updated to include language regarding observation of additional religious and cultural holidays and events that are not included holidays in City's payroll calendar.
- 2.3.1 ASR will work to increase its communication to all staff about factors considered for higher compensation and promotions as dictated by applicable CSC Rules and MOU provisions. ASR will also work to include more details about what factors hiring managers consider for promotions.
- 2.3.2 ASR will work with Racial Equity Core Team to develop a formal and transparent process for higher compensation and promotions as dictated by applicable CSC Rules and MOU provisions. ASR will also work to include more details about what factors hiring managers consider for promotions.
- 2.3.6 The department will look into creating a Fellowship Program for entry level staff to receive experience in different areas within the organization, including some supervisor experience. This will allow entry level staff to receive professional development and exposure to other roles within the organization.
- 2.4.2 The HR Team will create a tracking system to track what salary step ASR is placing new hires and promotions on. The tracking system will include data on ethnicity and gender.

3. Discipline and Separation (Adam & Jonathan)

Goals and performance measures

- Department Goal: The Department will adhere to a discipline and separation process that does not adversely impact people of color. If there is harm due to racial inequity or bias, we will have tools to voice those issues so that trust can be restored.
- Performance Measures:
 - Review discipline and separation statistics annually to ensure that staff of color are not disproportionately disciplined or separated.
 - Review exit interview responses and data to ensure that staff are not leaving the Department due to bias or discrimination.
 - Create clear, equitable, and accountable protocols for disciplinary actions to ensure that staff, especially BIPOC staff, are treated fairly and not adversely impacted through this process.

Changes implemented over the 2021 calendar year

If relevant, include action numbers from the RE Action Plan.

- 3.1.5 - Standardized discipline procedures and corrective actions to ensure that all employees receive the same level of discipline for a particular policy.

Priority actions for 2022 calendar year, including opportunities for staff input and decision-making

If relevant, include action item numbers from the RE Action Plan. Please also highlight any major revisions made to RE Action Plan since first submission.

- 3.1.1 - The HR Team will analyze data on disciplinary actions, including written warnings and up through termination. The data will go back 5 years and will be disaggregated by race and gender. Disciplinary actions will include verbal warnings through termination.
- 3.1.2 The HR Team will analyze data who has left the department voluntarily. The data will go back 5 years and will be disaggregated by race and gender.
- 3.1.3 The department will provide compassionate discipline and separation training when the training is available from DHR.
- 3.1.4 The department will continue to use the City's EAP and Peer Mediation Program to help with dispute resolution opportunities for our staff. ASR will share information with staff about the City's EAP and Peer Mediation Program so that staff are aware of the program and how to use it. Information will be included in HR newsletters on a semi-annual basis.

4. Diverse and Equitable Leadership

Goals and performance measures

- Department Goal: The Department will work towards creating a diverse leadership team that fosters a culture of inclusion and belonging. We will attempt to remove biases and provide tools for staff, especially Supervisors and Managers, to be able to identify examples of institutional and interpersonal racism.
- Performance Measures:
 - Develop a diverse and equitable leadership that will foster a culture of inclusion and belonging
 - Increase diversity in Leadership and track Senior Leadership Demographics
 - Provide Equity Training for Supervisors and Managers
 - Allow for anonymous feedback

Changes implemented over the 2021 calendar year

If relevant, include action numbers from the RE Action Plan.

- 4.1.3 The ASR annual report now includes demographic data for ASR staff and Leadership.
- 4.1.2 ASR Managers participated in a series of three Equity Trainings offered by the Department of Human Resources which included, Communicating Across Cultures, Effects of Privilege on Equity, and Managing with an Equity Mindset.
- 4.1.4 The Racial Equity Core Team created a new online anonymous feedback form where staff can give feedback on anything that is happening in the department. The anonymous suggestion box is available on the ASR Intranet and reminders go out to all staff every month in the ASR HR Newsletter. The team also worked with Managers to establish a process for referring suggestions to Division Managers, communicating any changes in process as a result of the decision and providing a transparent way to track the status and outcome of any feedback provided.

Priority actions for 2022 calendar year, including opportunities for staff input and decision-making

If relevant, include action item numbers from the RE Action Plan. Please also highlight any major revisions made to RE Action Plan since first submission.

- 4.1.1 The racial equity core team will review department and leadership data annually.
- 4.1.2 The Department will develop a training plan for Supervisors in 2022.

5. Mobility and Professional Development

Goals and performance measures

- Department Goal: The Department will continue to implement mechanisms within the office that create a career path for Assessor-Recorder positions. We will adopt a management approach that supports the success of people of color in their professional development and put measures in place that equalize setbacks they experience due to systemic and societal racism.
- Performance Measures:
 - Increase in the number of staff who receive professional development opportunities and track the count and racial demographics of participants to ensure equity
 - Increase diversity within the ASR Appraiser Trainee program, an entry level training program that provides a pathway to the County Appraiser career path

- Changes implemented over the 2021 calendar year
- If relevant, include action numbers from the RE Action Plan.
- 5.1.1 ASR received additional funding in the FY 20-21 budget and completed planning for a new Equity Professional Development program. The primary goal of the program is to support the success of People of Color and entry level staff in the office through prioritized access to professional development. By intentionally investing in specific professional development of our staff, we will uplift our employees' journey to developing new skills or refreshing their skills to ensure a professional career pathway within the office. Our goal is to put measures in place that equalize setbacks that People of Color experience due to systemic and societal racism. The program will also be open to other non-supervisory and non-managerial staff. To remove barriers to access, the program does not require advanced payment or reimbursement. Before launching the program the Racial Equity Team conducted extensive outreach to the Department by attending Division specific staff meetings. The RECT provided the program overview as well as the purpose of the program and connection to the ASR REAP and the Citywide Racial Equity Framework.
- 5.1.2 The RECT created a new training and professional development intranet page which gives all staff clear and transparent information about all of the training that is available to them. The intranet site covers City and Department mandated trainings, professional development options as well as the payment structure for each.
- 5.1.3 The new Equity Professional Development program offers our core staff an opportunity to enroll in training from three different providers: the Department of Human Resources, Be The Change and LearnIT. With these three providers staff have access to racial equity training, technical skills training, as well as soft skills and core competencies

- 5.2.1/5.2.3 All employees prepare a Performance Plan annually. This year, the plan template was changed to include a racial equity objective for all staff. The plan also includes a section for planned professional development. Supervisors are encouraged to help staff plan for professional growth.
- 5.2.3 As part of the racial equity plan, RECT team hosted two lunch and learn sessions in September and October where we discussed the individual career paths of staff at various levels within the department.
- 5.3.1 The department continued to implement the reasonable accommodation process in compliance with all applicable City and State rules. ASR HR provides information to all employees on how to request a reasonable accommodation. ASR HR processed fourteen reasonable accommodation requests, out of which eleven were approved and three were denied. ASR's decision to approve or deny reasonable accommodation requests are based on qualifying medical related reasons and operational feasibility, not on an employee's age, gender, or race.
- 5.3.4 Over the past year ASR expanded the number of employee engagement activities to facilitate staff connection and community while working remotely. These included virtual lunch breaks, stretch breaks, games and a weekly roll call lead by the Assessor. More recently, ASR HR created an Events Calendar page to provide staff with an easy way to access events and important dates. ASR HR also provides staff with Employee Assistance Program (EAP) information in times of crisis or life changing events, and on occasion through our HR newsletter. ASR also has an anonymous suggestion box for staff to submit requests for change.

Priority actions for 2022 calendar year, including opportunities for staff input and decision-making *If relevant, include action item numbers from the RE Action Plan. Please also highlight any major revisions made to RE Action Plan since first submission.*

- 5.2.2 Create a mentorship program for staff
- 5.2.3 Plan and implement racial equity brown bag sessions with staff
- 5.1.2 Monitor and grow participation in the Equity PD program

6. Organizational Culture of Belonging and Inclusion

Goals and performance measures

- Department Goals: The Department will embed the Racial Equity Action Plan into the organization's processes and procedures to foster an intentional culture of inclusion and belonging. We will emphasize collaboration in addressing existing and future anti-racist behavior to strengthen principles of fairness and equity and encourage respect for cultural differences within the office.
- Performance Measures:
 - In 2022 have 100% of staff attend DHR implicit bias training.
 - In 2022 have at least 10 staff members attend Professional Development Training
 - Increase in the number of employees responding to the racial equity survey by 10% from 62% to 72% in 2022

- Changes implemented over the 2021 calendar year
- If relevant, include action numbers from the RE Action Plan.
- 6.1.3 The Racial Equity Core Team developed the Racial Equity Action Plan and regularly updates the status of Plan actions and objectives .
- The Team created a Racial Equity Intranet site that is accessible to staff. The site also includes a list of racial equity resources ranging from books, to articles and videos. This information has been published on the ASR intranet and staff has been informed of this resource. The books section for example was catalogued as follows: (1) How did we get here?; (2) Where are we now?; (3) What comes next? Moving forward; (4) Inviting conversations about race with the younger generation. This information is not static as additional resources are added routinely.
- RECT staff gave an overview and update on the Racial Equity Plan at an all staff meeting. This entailed presenting the focused areas of the plan as well as actions implemented.
- 6.1.4 The RECT created a racial equity section within the HR Newsletter. The team issued a comprehensive statement on Diversity, Inclusion and Belonging in the September 2021 ASR HR Update Newsletter as well as related statements and updates on the REAP in subsequent newsletters.
- 6.1.6 ASR HR created a cycle by which all staff will complete DHR's Implicit Bias training. In 2021, Department Managers attended an equity training series developed by DHR.
- 6.1.7 ASR's Racial Equity Team was created in fall 2020 and the first All Staff Equity Survey was conducted in October 2020. Feedback from the survey was incorporated into the "Plan" accordingly.
- 6.1.8 The Public Affairs Division is working on a project to display diverse public art in Assessor's office space. Through a contract with ArtSpan, a 501(c)(3) non-profit organization,

we will showcase inclusive art pieces by local artists that highlights the beauty and diversity of our community.

- 6.2.1 ASR HR manages personnel changes and works with ASR IT to ensure that new hires have email accounts are set-up by the employee's start date. ASR HR also updates the list of contacts to receive the HR newsletter so that all staff have access to HR updates. ASR HR also reminds all staff to update their personal contact information in the SF Employee Portal to ensure that the department can communicate with staff in case of emergencies.
- 6.3.2 In 2018, ASR completed an office renovation to accommodate more staff and create new open and accessible, workstations. for all staff including a larger and functional breakroom. ASR HR provides an elevator key to staff members who have a medical condition preventing them from using the stairs to access part of the office in upper and lower floors. ASR HR also provides staff with information to the location of designated lactation rooms or meeting rooms throughout City Hall.
- 6.3.3/ 6.3.6 ASR complies with all applicable City & State laws, rules, policies and procedures related to reasonable accommodations for its staff. ASR complies with hiring standards and practices providing applicants with information on job announcements for requesting accommodations for taking a Civil Service Exam, or any part of the hiring process. The department has developed a robust language access plan and worked diligently to create accessible information sheets in multiple languages and in a culturally competent manner. The department also distributes information i the mediums most available to people through educational video series, a monthly e-newsletter, and digital workshops. ASR has also set-up new ways of communicating and engaging with its staff, and accessibility to information shared through online tools like MS Teams, Zoom, and the department's own intranet page.
- 6.3.4 In 2016 ASR created its own departmental Language Access Ordinance Policy, which provides staff with access to various translation services, including bilingual telephone line, in-house certified bilingual staff, or multi-lingual information materials, when providing services to the public. ASR also utilizes its in-house certified bilingual staff to assist the public as well as translate forms and documents that are provided to the public.
- 6.3.5 ASR actively promotes and makes staff feel comfortable in expressing their identity through sharing their gender pronouns in the email signatures or in dressing in cultural attire that complies with the Department's dress code.
- 6.4.1 Create process for feedback on community events “ The Department creates feedback processes by listening to community and our community based partners, to find avenues for the Assessor-Recorder to connect with community. Our contact information is departed with audiences in our last slide on how to reach our office to answer more details. Additionally, the questions and comments are sent to the Public Affairs team in chat features on Zoom, through email, and social media. A monthly newsletter is sent to constituents and often constituents respond to messages in the newsletter to provide follow up dialogue. In 2021, the Assessor-Recorder attended over 131 community meetings, street fairs, cultural celebrations, and workshops to understand community needs and to answer questions in partnership with local nonprofits. Since December 2021, the Assessor-Recorder has begun to

take office hours in neighborhoods in order to meet constituents and make our office more accessible. So far we have held two “Assessor Torres in the Neighborhood” in Bayview and Excelsior Public Libraries.

- 6.4.2 The Department created the Family Wealth Forum to bring estate planning attorneys, tax experts, and certified financial planners together with Assessor's Office staff to offer free one-on-one counseling and multilingual workshops to local families. Since the inception of the Family Wealth Forum, the Department has hosted Forums and events in every supervisory district in San Francisco, serving over 1,100 households, and working with community-based organizations to tailor each event to the neighborhood in which it will be hosted.

Priority actions for 2022 calendar year, including opportunities for staff input and decision-making *If relevant, include action item numbers from the RE Action Plan. Please also highlight any major revisions made to RE Action Plan since first submission.*

- 6.1.1 Convene a working group of departmentwide staff to help update the Department's core values, job descriptions and mission statement.
- 6.1.5 Assess the need for internal affinity groups. Based on the 2020 survey response, most staff were not interested in forming affinity groups. .6.3.1 Create an accessibility checklist to ensure that the Department takes into consideration access by staff and the customers it serves to all events, communications, and departmental functions.

7. Boards and Commissions

Goals and performance measures

- NA

Changes implemented over the 2021 calendar year

If relevant, include action numbers from the RE Action Plan.

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Priority actions for 2022 calendar year, including opportunities for staff input and decision-making *If relevant, include action item numbers from the RE Action Plan. Please also highlight any major revisions made to RE Action Plan since first submission.*

Department Resourcing for Phase 1 RE Action Plan

Please describe your department's resourcing for Phase 1 RE Action Plan implementation in 2021. Include employee names, titles, and organizational chart. Note the designated Racial Equity Leader(s) with an asterisk. Please clearly distinguish between:

There are 11 members of the ASR Racial Equity Core Team, 8 of the members started in 2020, 2 new members were added in 2021 (*) and 1 additional member was added in 2022 (**). Three of the members serve as Racial Equity Leads (^)

- *^Sean Finley, Director of Information Technology
- ^Jonathan Nelly, Director of Human Resources;
- ^Simone Jacques Deputy Assessor for Administration and Finance,
- Al Barber, Real Property Appraiser
- Brooke Bahador, Senior Real Property Appraiser
- Michael Kelleher, Senior Real Property Appraiser
- Jessica Li, Office Assistant
- Michael Louie, Real Property Appraiser
- Concepcion Vindell, Principal Real Property Appraiser
- *Adam Mehis, Public Affairs
- **Juan Carlos Cancino, Deputy Assessor for Operations

In total all members are available on a part time basis and have core responsibilities that are not directly related to racial equity, thus their time on core responsibilities is reduced for them to take on racial equity work. Team members spend 1-2 hours per week attending meetings and working on plan objectives. Lead members spend 2 – 3 hours per week attending meetings and working on plan objectives. Assuming this level of work, the FTE equivalent dedicated to the racial equity plan is approximately 0.28.

What changes, if any, do you plan for 2022?

In 2022, ASR will request several new resources to help implement the REAP:

- In January 2022, the Assessor-Recorder, Treasurer & Tax Collector and Controller concluded a 9 month joint RFP process to select a Racial Equity Consultant. The Department's expect to award the contract by March 2022. The Assessor-Recorder is requesting a budget of \$40,000 per year for three years to fund our work with the consultant.
- The FY 22-23 budget request includes a new 1822 Administrative Analyst position to work 50% - 75% on Racial Equity Plan analysis and tracking. The department is requesting a substitution from another position
- The FY 22-23 budget request includes funding a new 1824 Principal Administrative Analyst to assist with project management of the racial equity plan.

Attachments

Workforce and board/commission demographic data

Include relevant data on status of racial equity within department, such as race/ethnicity by job classification, average pay, discipline and separation, promotions, and changes over the last calendar year.

[See Attached](#)

Racial Equity Action Plan

http://www.sfassessor.org/sites/default/files/documents/ASR_Racial_Equity_Action_Plan_V1.3_12.3_1.20.pdf

Departmental Racial Equity Progress Report
Annual Report for 2021

Part B

Submit final to ORE by April 1, 2022

Attend ORE working sessions in January-February 2022 to develop Part B.

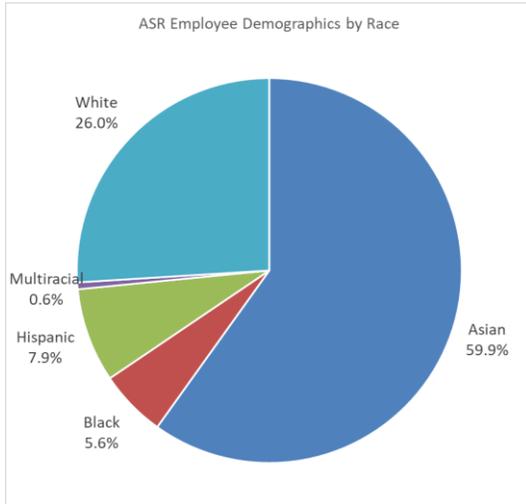
| <i>Attachment</i> |
|---|
| Budget Equity Tool: Department Inventory <i>Completed department inventory spreadsheet</i> |

ASSESSOR-RECORDER DEMOGRAPHIC DATA
PREPARED FOR THE 2022 RACIAL EQUITY PLAN PROGRESS REPORT

The following charts represent staff demographics by race, gender, job classification and much more. These charts show the clear disparities that must be remedied through implementation of the ASR Racial Equity Action Plan.

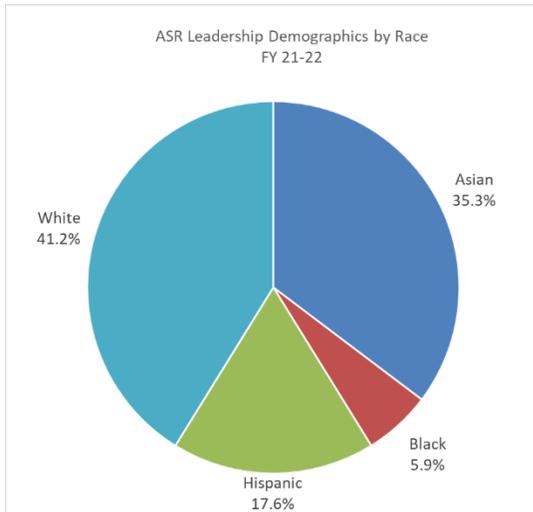
1. STAFF DEMOGRAPHICS BY RACE (FY 21-22)

In Fiscal Year 2021-22, ASR's staff demographics, by race, were 59.9% Asian; 26.0% White; 7.9% Hispanic; 5.6% Black; and 0.6% Multiracial. The department has a total of 178 employees.



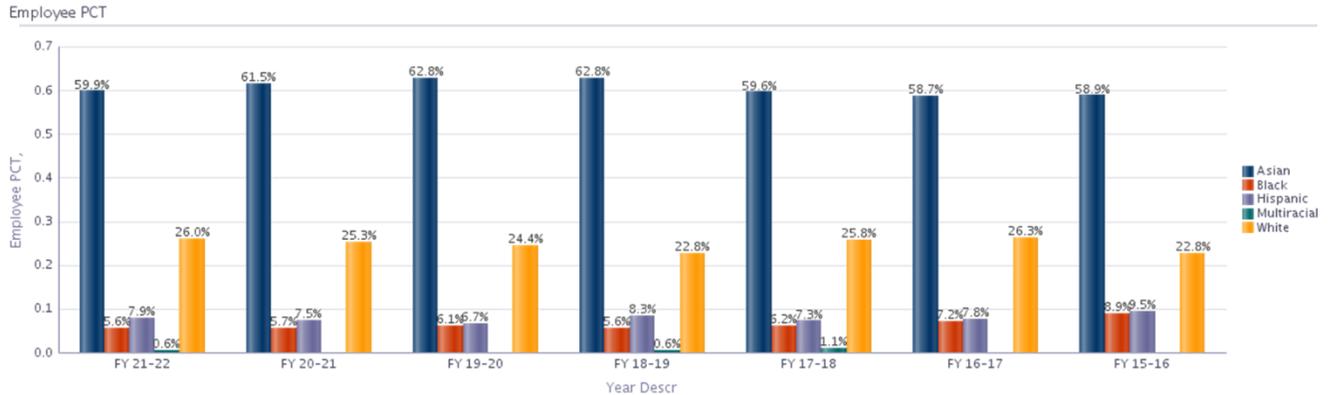
2. LEADERSHIP DEMOGRAPHICS BY RACE (FY 21-22)

In FY 2021-22 ASR's leadership demographics, by race, were 41.2% White; 35.3% Asian; 17.6% Hispanic and 5.9% Black.



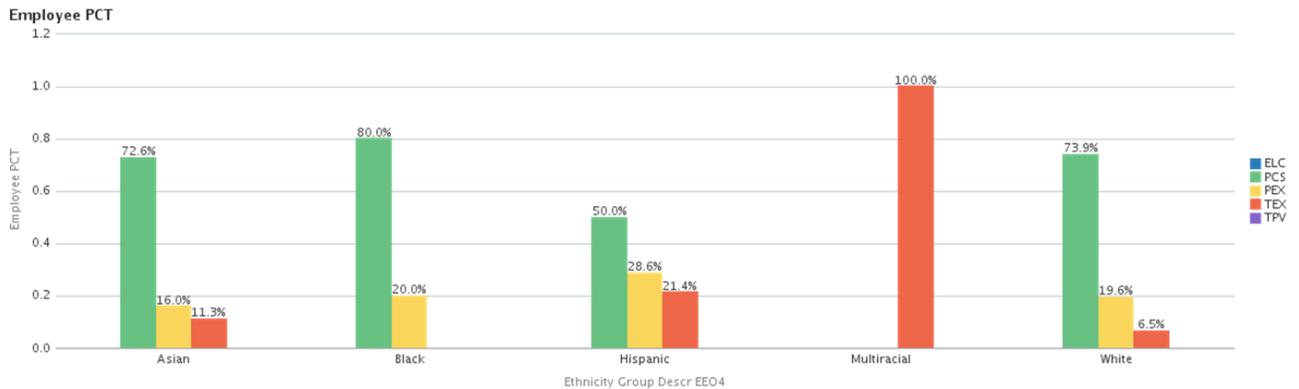
3. STAFF DEMOGRAPHICS BY RACE (FY 15-16 THROUGH FY 21-22)

Over the past seven years the percent of staff identifying as Black has decreased from 8.9% in FY 15-16 to 5.6% in FY 21-22. The percent of staff identifying as Hispanic has also decreased from 9.5% to 7.9%. The percentage of staff identifying as Asian has stayed fairly steady, while the percent of staff identifying as White has increased from 22% to 26%.



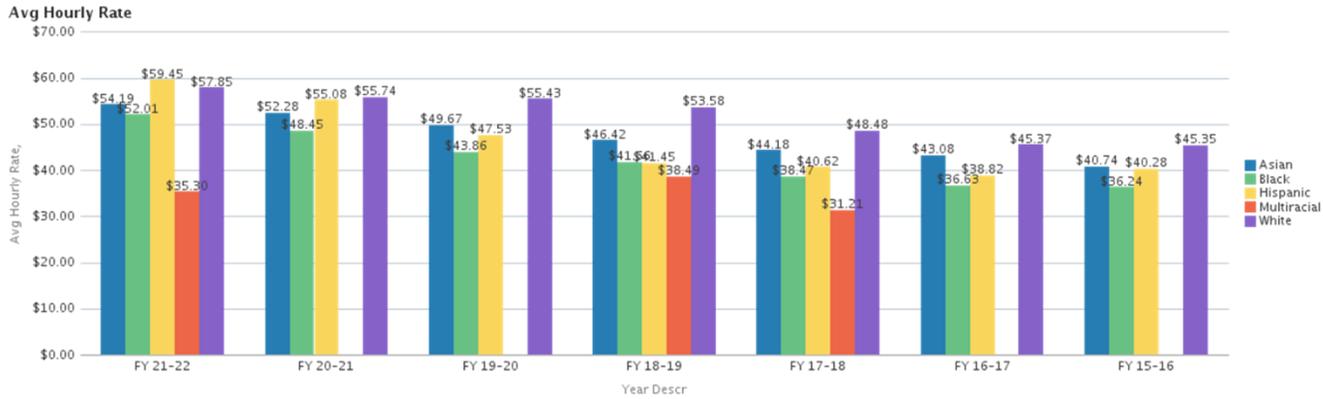
4. STAFF BY APPOINTMENT TYPE (FY 21-22)

The majority of ASR staff are in PCS positions. ASR uses PEX positions for upper-level management as well as for staff who are temporarily assigned to Department's major IT project to replace our ageing Property Assessment System. Most of these positions are in the Information Technology classification. TEX positions are primarily used to backfill positions on leave.



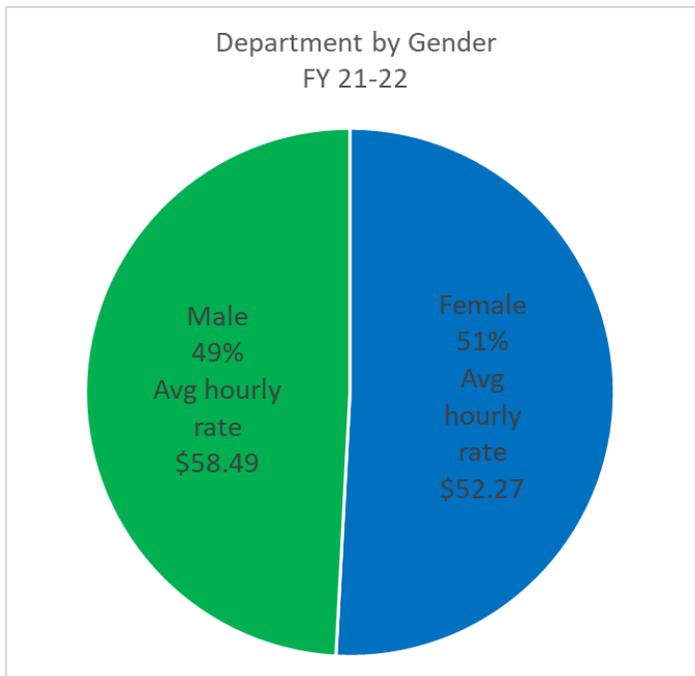
5. **STAFF DEMOGRAPHICS BY RACE AND AVERAGE HOURLY RATE (FY 15-16 THROUGH FY 21-22)**

This graph shows disparities in average hourly earnings by race. Staff who identify as black or multi-racial are consistently paid less than their peers on average. In FY20-21 average hourly rates for staff who identify as Hispanic increased due to promotions and changes in leadership.



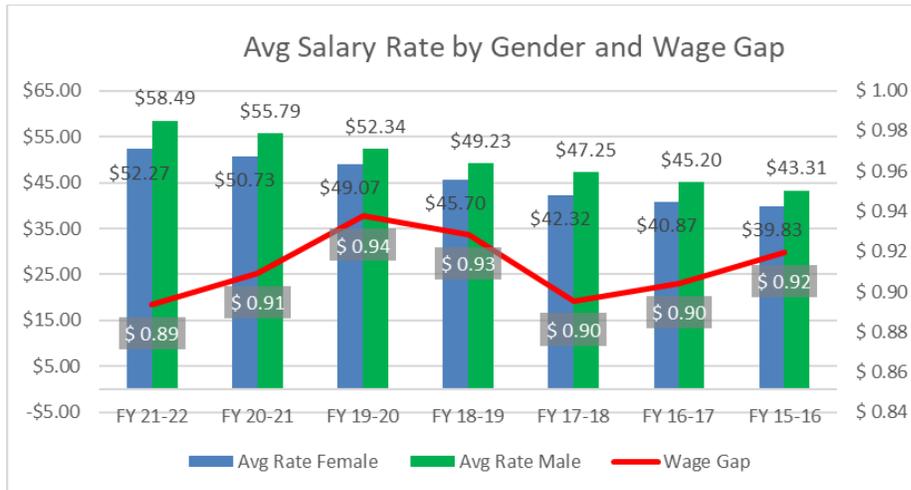
6. **STAFF BY GENDER AND AVERAGE HOURLY RATE (FY 21-22)**

The Department is roughly half male and half female. The Department does not have statistics on staff who do are gender neutral or gender non-conforming.



7. STAFF BY GENDER AND WAGE GAP (FY 15-16 THROUGH FY 21-22)

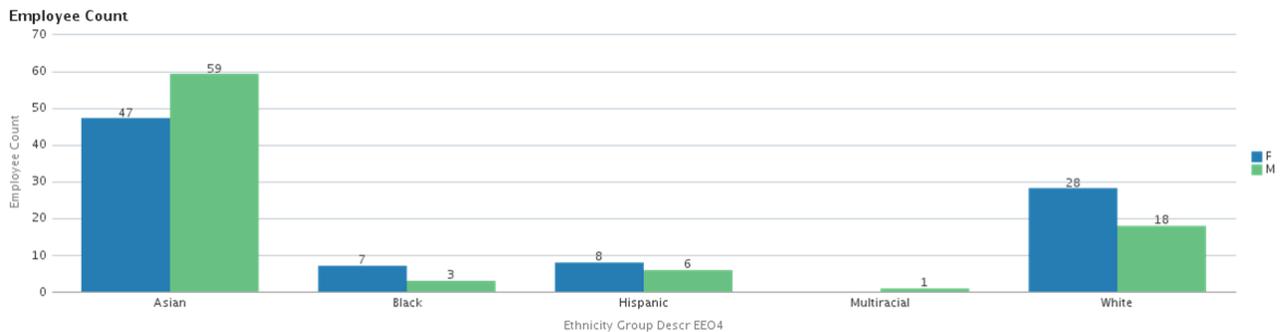
While women represent a small majority of the Department, they are consistently paid less than their male counterparts. In FY 21-22 women make \$0.89 for every \$1.00 made by males in the Department.



8. STAFF BY RACE AND GENDER (FY 21-22)

This chart shows the number of employees in the department and how they identify. Asian females represent the largest subgroup within the Department at 33%.

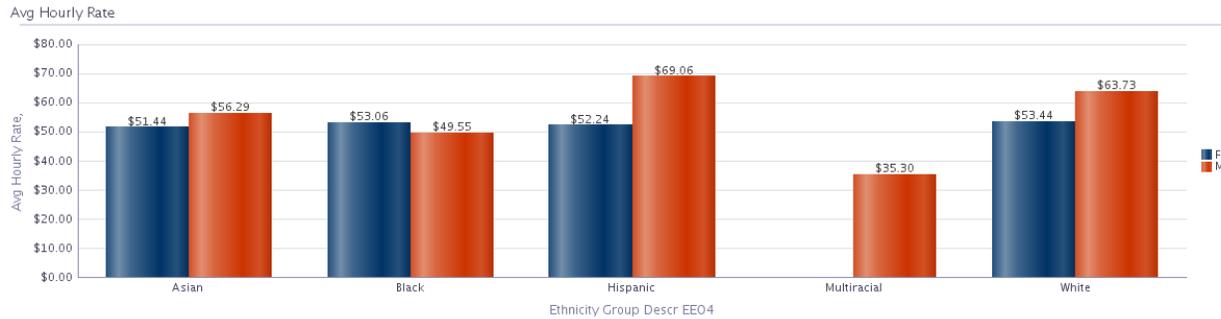
- In FY 2021-22, there were 59 females and 47 males who identified as Asian (total of 106 Asian).
- There were 7 females and 3 males who identified as Black (total 10 Black).
- There were 8 females and 6 males who identified as Hispanic (total 14 Hispanic).
- There was 1 male who identified as Multiracial.
- There were 28 females and 18 males who identified as White (total 46 White).



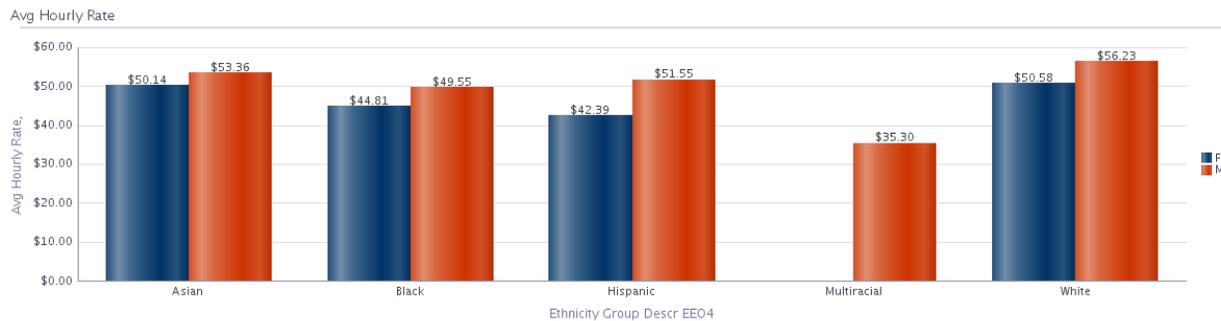
9. STAFF BY RACE, GENDER AND AVERAGE HOURLY RATE (FY 21-22)

When excluding hourly rates for Managers, staff who identify as Hispanic or African American receive lower pay than their Asian and White counterparts. Average salaries for African American and Hispanic women are lower than their peer groups. In FY 21-22 there is one person who identified as multi-racial, therefore the data may not represent salary trends for multi-racial staff as a group for comparison to other the other categories.

Including Managers:

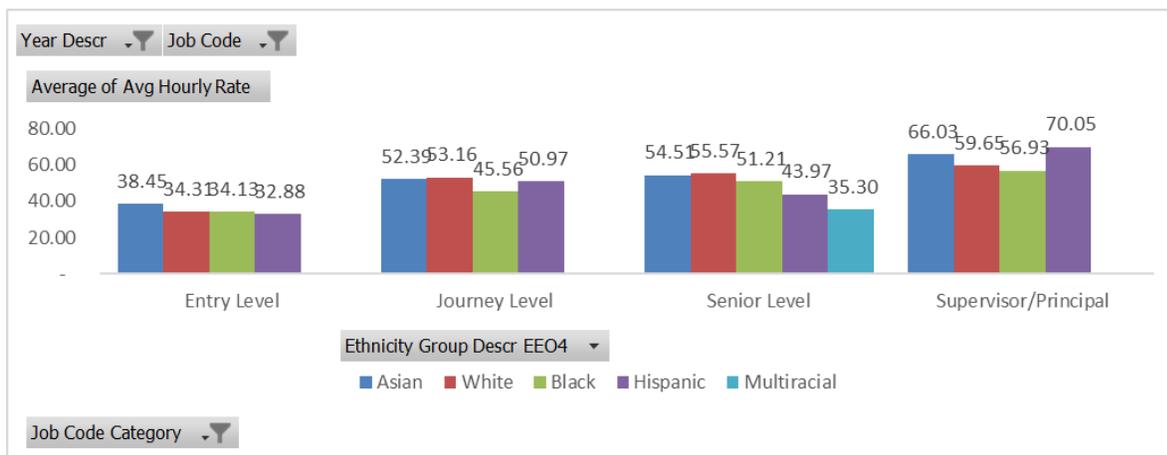


Not including Managers:



10. RACE BY JOB LEVEL AND AVERAGE HOURLY RATE (FY 21-22)

When grouping similar job classes, we still see that staff who identify as Black or Hispanic are paid less in every group, except the Supervisor/Principal level.

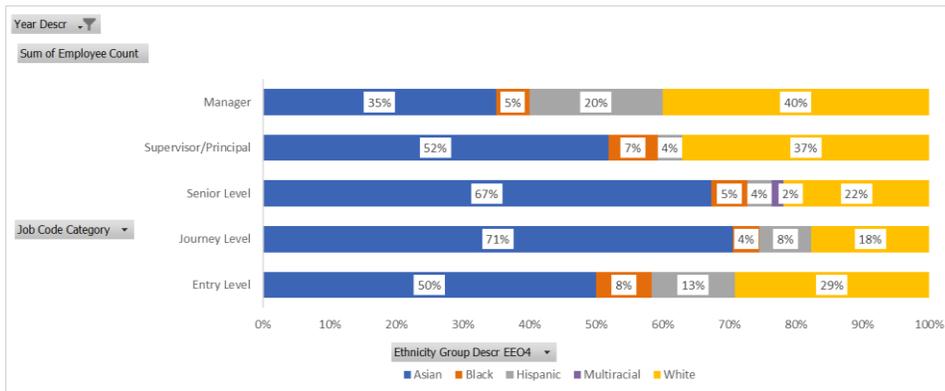


11. **BREAKDOWN OF ASR STAFF BY JOB LEVEL AND RACE (FY 15-16 vs FY 21-22)**

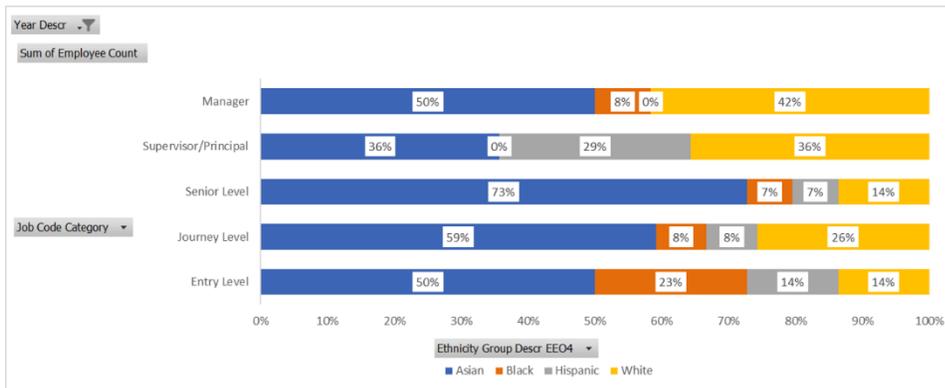
These charts compare the makeup of the department by job code category in FY 15-16 versus FY 21-22. Highlights include:

- f. Management staff who identify as Hispanic has grown from 0% to 20%
- g. Entry level staff who identify as Black has declined from 23% to 8%. The percentage of Journey level staff decreased from 8% to 4% without subsequent growth in the other job categories, meaning these staff are not being promoted and are most likely leaving the Department.

FY 21-22



FY 15-16



12. BREAKDOWN OF ASR SPECIFIC JOB CLASSIFICATIONS BY RACE (FY 15-16 VS FY 21-22)

When viewing the breakdown by race among ASR specific job classifications, we see that staff who identify as Black, or Hispanic are more likely to work in the Office Assistant, Office Specialist and Operations Supervisor Classifications. These positions are typically lower paid and lack the promotional range of the Appraiser and Auditor-Appraiser job classifications in the Department.

| Sum of Employee Count | Column Labels | | | | | Grand Total |
|---|---------------|-------|----------|-------------|-------|-------------|
| Row Labels | Asian | Black | Hispanic | Multiracial | White | Grand Total |
| Office Specialists, Office Assistants, Operations Supervisor | 56% | 12% | 13% | 1% | 18% | 100% |
| FY 15-16 | 60% | 13% | 17% | 0% | 10% | 100% |
| FY 16-17 | 54% | 11% | 15% | 0% | 20% | 100% |
| FY 17-18 | 54% | 8% | 15% | 4% | 19% | 100% |
| FY 18-19 | 59% | 10% | 12% | 2% | 16% | 100% |
| FY 19-20 | 56% | 15% | 10% | 0% | 19% | 100% |
| FY 20-21 | 56% | 13% | 11% | 0% | 20% | 100% |
| FY 21-22 | 54% | 13% | 10% | 2% | 21% | 100% |
| Auditor Appraisers | 99% | 0% | 1% | 0% | 0% | 100% |
| FY 15-16 | 100% | 0% | 0% | 0% | 0% | 100% |
| FY 16-17 | 100% | 0% | 0% | 0% | 0% | 100% |
| FY 17-18 | 100% | 0% | 0% | 0% | 0% | 100% |
| FY 18-19 | 95% | 0% | 5% | 0% | 0% | 100% |
| FY 19-20 | 100% | 0% | 0% | 0% | 0% | 100% |
| FY 20-21 | 100% | 0% | 0% | 0% | 0% | 100% |
| FY 21-22 | 100% | 0% | 0% | 0% | 0% | 100% |
| Real Property Appraisers | 53% | 5% | 5% | 0% | 37% | 100% |
| FY 15-16 | 44% | 8% | 8% | 0% | 40% | 100% |
| FY 16-17 | 46% | 5% | 5% | 0% | 43% | 100% |
| FY 17-18 | 52% | 5% | 5% | 0% | 39% | 100% |
| FY 18-19 | 55% | 5% | 5% | 0% | 34% | 100% |
| FY 19-20 | 56% | 5% | 5% | 0% | 34% | 100% |
| FY 20-21 | 56% | 5% | 4% | 0% | 35% | 100% |
| FY 21-22 | 57% | 4% | 4% | 0% | 36% | 100% |

13. PROMOTIONS

Over the past seven years, staff who identify as Asian have been promoted at higher rates than other subgroups followed by staff who identify as White (27%), Hispanic (7%) and Black (5%).

| Row Labels | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | Grand Total |
|-------------------|---------|---------|---------|---------|---------|---------|---------|-------------|
| Promotions | | | | | | | | |
| Asian | 59% | 61% | 57% | 67% | 52% | 43% | 55% | 59% |
| Black | 9% | 3% | 3% | 2% | 13% | 14% | 0% | 5% |
| Hispanic | 5% | 8% | 0% | 2% | 17% | 14% | 27% | 7% |
| Multiracial | 0% | 0% | 5% | 0% | 0% | 0% | 0% | 1% |
| White | 27% | 28% | 35% | 28% | 17% | 29% | 18% | 27% |

14. NEW HIRES

New hire data from the prior five years closely mirrors promotion data with Asian staff representing the majority of Department hires at an average 63% over the last seven years.

| Row Labels | 2015-16 | 2016-17 | 2017-18 | 2018-19 | 2019-20 | 2020-21 | 2021-22 | Grand Total |
|------------------|---------|---------|---------|---------|---------|---------|---------|-------------|
| New hires | | | | | | | | |
| Asian | 68% | 44% | 73% | 63% | 77% | 60% | 50% | 63% |
| Black | 5% | 12% | 12% | 0% | 8% | 0% | 17% | 8% |
| Hispanic | 5% | 0% | 4% | 21% | 0% | 0% | 0% | 5% |
| Multiracial | 0% | 0% | 0% | 0% | 0% | 0% | 17% | 1% |
| White | 21% | 44% | 12% | 16% | 15% | 40% | 17% | 23% |

| B. Item name and description | C. Overall resources | D. Racial equity alignment | E. Racial equity-related activity information |
|--|----------------------|----------------------------|---|
| <p>Complete only for line items that are aligned with a department priority equity issue area (D) If data is not collected within department, enter "not available" If data needs is collected but needs further analysis, enter "to be updated" If any of this information exists in a separate report or document, please also include the link in the cell</p> | | | |

Department Inventory Tool: FY 21-22 Budget

ORE Version: Dec 31, 2021, with updates Feb 9, 2022

[For guidance and upcoming workshops, click here](#)

| About this worksheet | | |
|----------------------|-------------------|--|
| Department name | Date last updated | Notes |
| Assessor-Recorder | 3/31/2022 | Initial inventory submitted as part of department progress report, per guidance from Office of Racial Equity. Will be further refined during development of Phase Two Racial Equity Action Plans |

| A. Department priority issue areas for improving racial equity or closing racial equity gaps, especially within its existing services | | |
|---|--|--|
| Issue area | Brief description | Notes or examples |
| 1. Public Outreach and Information | To further provide greater access, transparency, and outreach to San Franciscans, we have participated in outreach efforts across the city. In 2021, we attended over 130 community meetings, street fairs, cultural celebrations and workshops to better understand the diverse needs of community and to answer their questions directly. In partnership with local nonprofits and neighborhood libraries across the city, we hosted our annual Family Wealth Series and launched our Assessor-in-the-Neighborhood open office hour series to meet constituents where they live both online and in person. | Our annual Family Wealth Series was partnered with the SF Public Library every week in July 2021. This was done to continue the conference during the pandemic and utilize a public channels and offices to raise awareness of the event. The Office attended Sunday Streets events and the Autumn Moon Festival where we had one-page information sheets in various languages and office support to answer constituent questions. This ensured we could provide materials in language and could answer specific questions from the public. To increase our messaging, we regularly post on social media and publicize events in our monthly newsletter to inform the public of deadlines and programs. For our estate planning program, we have partnered with supervisors' offices to outreach to low-income and moderate-income households. We have partnered with 31 Southeastern organizations and 18 Black and Latino churches. Our next outreach event is in Cantonese to speak to monolingual speakers and share the news on estate planning. Additionally, Assessor-Recorder Torres had media interviews in Spanish and Chinese to outreach to these communities on the estate plans. |
| 2. Racial Covenant Redaction Program (AB1466) | Remove discriminatory language from recorded documents. | |
| 3. Racial Equity Consultant | Hire a racial equity consultant to help the Department implement the REAP, build capacity of the RECT, implement all staff training and host working groups to get staff input on the REAP. | |
| 4. Professional Development | Provide professional development opportunities to staff prioritizing BIPOC and entry level staff. | |
| 5. Recruitment | Identify barriers to applying for ASR jobs. Increase recruitment efforts targeting BIPOC. | |

| B. Item name and description | | | C. Overall resources | | | | D. Racial equity alignment | E. Racial equity-related activity information | | | | | | | | | |
|--|--|---------------------------------------|--|--|---|--|--|---|---|---|---|---|---|---|---|--|---|
| Name of activity, function, program, service, or initiative <i>Suggest 10 words or less</i> | | | Brief description of purpose <i>Suggest 50 words or less. Note any intended demographics or communities</i> | Activity/service type 1 - Public-facing activity or service 2 - For other City departments 3 - Within department only | Estimated FTEs and/or budget amount | Funding type <i>Note whether funding is City general fund, restricted government source, or other</i> | Estimated number of contracted service providers or consultants for this activity/service, if any <i>By total contract amount</i> | Names of 5 largest contracted service providers or consultants for this activity/service, if any <i>By total contract amount</i> | Department priority equity issue areas <i>List any priority equity issue areas from (A) that are relevant to this activity. If none, leave blank.</i> | Locations <i>Note neighborhood(s) in which activity/service facility is located. See list on next tab for examples</i> | Open to general public or application/referral required 1 - General public 2 - Application or referral required | Estimated number of people served <i>Suggest 10 words or less</i> | Estimated racial/ethnic demographics of people served <i>Suggest 30 words or less</i> | Additional demographics of people served <i>Suggest 30 words or less. See list on next tab for examples</i> | Community input and decision-making opportunities <i>Suggest 30 words or less. See list on next tab for examples. If none, leave blank</i> | Estimated FTEs and/or budget specifically for racial equity improvements | Names of contracted providers or consultants for racial equity improvements, if any <i>Include as attachment if too many to list in cell</i> |
| Estate Planning Partnership | In partnership with Housing and Economic Rights Advocates (HERA), 100 households will receive free and affordable estate planning services for SF's low- and moderate-income households to protect family wealth, provide a strategic plan for their health and property, and safeguard families from probate fees and potential loss of property. This program will target households in the southeast neighborhoods of San Francisco and Western Addition, neighborhoods with approx. 80% people of color, >25% black concentration (Bayview and Western Addition), and 35% Hispanic or Latino concentration (Bernal Heights, Bayview, Excelsior). The Office has partnered with Supervisors, local nonprofits, and community stakeholders to ensure residents are aware of the program. | 1 - Public-facing activity or service | Approximately 500,000 | Behested payment (ASR recommended Housing and Economic Rights Advocates (HERA) for Crankstart grant) | Residents of the Southeastern neighborhoods (Bayview, Portola, Outer Mission, etc) and Western Addition may contact HERA through email or by phone for intake. HERA collects and processes the information to enroll them into the program. | | | 1 | Bayview, Visitacion Valley, Portola, Bernal Heights, Excelsior, Outer Mission, Mission Terrace, Ingleside, Ingleside Heights, Ocean View, Silver Terrace, Crocker Amazon, Little Hollywood, Bayview Heights, Candlestick Point, Hunter's Point, and Western Addition neighborhoods. | 2 - Application or referral required | 100 Households will receive estate plans. Over 200 people have attended our workshops. | We are serving 51/100 estate plans so far. To date, 20% of the participants are Latino, 43% are Asian American, 10% are African American and 20% are white. | 71% (36) of the households are from extremely low to low income and 10 are from moderate income households. All of the participants so far are from the southeastern neighborhoods. | The Office of the Assessor-Recorder created the Family Wealth Series to empower financial literacy. It was brought up in these sessions that community needed access to free and affordable estate plans. The Office of the Assessor-Recorder listened to community to provide no cost to low cost estate plans through HERA. | | 0 | HERA |
| Racial Covenant Redaction Program | Discriminatory racial covenants were rules that were placed into recorded documents that prevented the sale or rental to people of certain ethnicities, sexualities and genders. These laws reinforced segregation and limited homeownership and wealth building among people of color. Many homeowners and homebuyers today may not be aware that discriminatory racial covenants can still be found in some recorded documents despite these laws being unenforceable and deemed unconstitutional by the United States Supreme. The Racial Covenant Redaction program will redact discriminatory language from recorded documents. | 1 - Public-facing activity or service | 240,000 | AB1466 fee or general fund | | | 1 | Sole source - BMI Imaging Systems | 2 | Citywide | 2 - Application or referral required | tbd | unknown | | 1.50 | Sole Source - BMI Imaging Systems. | |
| Racial Equity Consultant | Together with the Treasurer and Tax Collector and Controller's Office, ASR has hired a racial equity consultant to help guide implementation of the Racial Equity Plan. The consultant will help with core team capacity building, executive and all staff training. The Department will Hire a racial equity consultant to help implement the REAP, build capacity of the RECT, implement all staff training and host working groups to get staff input on the REAP. | 3 - Within department only | \$40,000 per year, \$120,000 over 3 years | General fund | | | 1 | RFP - Conant Coaching and Consulting | 3 | n/a | | 179 All ASR staff | | Customer service survey | | | RFP - Conant Coaching and Consulting |
| Professional Development | In 2022 ASR initiated an Equity Professional Development program to give intentional development opportunities to all staff while prioritizing BIPOC and entry level staff. The program gives staff access to three learning providers, the Department of Human Resources, LearnIT1 and Be the Change Consulting. | 3 - Within department only | 20,000 | General fund | | | 3 | DHR, LearnIT1, Be the Change Inc. | 4 | n/a | | | | | | 0.1 | Department of Human Resources, LearnIT1, Be the Change Consulting |
| Recruitment | In reviewing our application data, we found a clear disparity in the number of BIPOC applying for ASR positions. We aim to create processes to increase the number of underrepresented people of color (specifically those that identify as Black and Latinx) who apply to Department positions and are subsequently hired. We aim to break down the barriers that keep BIPOC people from applying to opportunities within the Department and ensure everyone is able to showcase their talents and skills in a meaningful way. | 1 - Public-facing activity or service | 0.5 | General fund | | | 0 | None | 5 | n/a | 2 - Application or referral required | tbd | tbd | unknown | | 0.5 | |
| Internships | ASR will work with the Opportunities for All Program to host two summer interns annually. Through the internship we hope to give BIPOC students a positive work experience in government and increase awareness about career opportunities with ASR. | 1 - Public-facing activity or service | 14,000 | General fund | | | | | 5 | n/a | | 2 | tbd | | | 0.1 | Opportunities for All |
| Family Wealth Series | The Office of Assessor-Recorder expanded the Family Wealth Series to a 4-part webinar in collaboration with the San Francisco Public Library beginning on July 6, 2021 through the entire month of July. Attendees learned about Proposition 19, property taxes, and public resources to strengthen their financial resiliency. Some guest presenters included financial experts from Northeast Community Federal Credit Union, Mission Asset Fund, and Housing and Economic Rights Advocates. This program is yearly and happens every July. Translation services were available in Spanish and Chinese. | 1 - Public-facing activity or service | 5000 | General fund | | | 1 | | | By zoom | 1 - General public | 1,100 views | 45% Asian; 36% White; 11% Multiracial; 6% Black; 1% American Indian; 13% Hispanic | Unknown | | 5,000 | Bilingual Translation and Interpretation |
| Neighborhood Events | The Office hosted workshops and attended events in neighborhoods to provide information to diverse residents and to show multicultural solidarity. Some events included Juneteenth Celebrations, the first annual 2022 Black History Month and Lunar New Year Resource Fair in Visitacion Valley, and anti-racist panel discussions. Assessor-Recorder Torres presented to the National Coalition of 100 Black Women's SF Chapter to discuss Proposition 19, new developments, and answer their questions. The Assessor-Recorder focuses the office's event participation in diverse areas of SF. Depending on the event, the Assessor-Recorder provides welcome remarks and tables with staff to increase awareness and public education of our office's resources. | 1 - Public-facing activity or service | | 1 | General Fund | | 0 | | | Citywide | 1 - General public | unknown | unknown | unknown | | | |