



# Grand Jury School Parcel Tax Exemptions Report

Governing Board Presentation • June 1, 2017

# Grand Jury Report: Background Information

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- ▶ Complaint from a citizen regarding a elementary school district requiring seniors to apply for the parcel tax exemption in person.
  - ▶ The Grand Jury expanded the investigation to all 22 county school districts that currently offer exemptions from parcel tax assessments.
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# Grand Jury Report: Investigation Parameters

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- ▶ How County school districts inform homeowners about the availability of exemptions, eligibility rules and how to apply.
  - ▶ What procedures are required to apply for a parcel tax exemption.
  - ▶ How school districts manage the exemption renewal process.
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## Recommendation 1a

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- ▶ The governing boards of the school districts listed below should include information about parcel tax exemptions and application procedures via public outreach to communicate with those who do not have access to or are uncomfortable using the Internet.
  - ▶ **Response: We currently post in the newspaper and libraries. We will identify local senior centers and other agencies frequented by seniors and add them to the list.**
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## Recommendation 1b

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- ▶ The governing boards of the school districts listed below should have a link on **the home page** of their websites to direct users to information about the parcel tax, available exemptions, and instructions and required forms to apply for an exemption. The link should include the words “parcel tax.”
  - ▶ **Response: We will add a direct link to the main web page.**
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## Recommendation 2

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- ▶ The governing boards of the Santa Clara County school districts listed below should review and revise as necessary all forms required to apply for or renew parcel tax exemptions for clarity and accuracy.
  - ▶ **Response: We will review and revise our forms to clarify whether Social Security Insurance and or Social Security Disability Insurance recipients are eligible for parcel tax exemptions.**
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## Recommendation 3b

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- ▶ The governing boards of the Santa Clara County school districts listed below should develop an online process for the submittal of parcel tax exemption and renewal applications.
  - ▶ **Response: We will place all district forms on-line this fall.**
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## Recommendation 4

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- ▶ The governing boards of the Santa Clara County school districts listed below should make exemption application forms for parcel taxes prominently available on their websites and in their offices year round.
  - ▶ **Response: Making forms available on our website and in our offices was established when we started the process last year. We will make it easier for seniors to locate the forms on our website.**
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## Recommendation 5

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- ▶ The governing boards of the Santa Clara County school districts listed below should agree on a standard date when applications for exemptions and renewals are due.
  - ▶ **Response: Since our due date, June 30<sup>th</sup>, is the last possible date before the forms are due at the County on July 1<sup>st</sup>, and half of the districts in the County already use that date, we believe our process meets the requirement.**
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## Recommendation 6

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- ▶ The governing boards of the Santa Clara County school districts listed below that require renewal of parcel tax exemptions should initiate the renewal process by mailing an exemption renewal form and accepting renewal documentation by return mail.
  - ▶ **Response: We have renewed every two years in the past. When we do our first renewal this year, we are planning to send it out by mail and receiving it back by return mail. Staff will explore the process of annual renewals and make a recommendation in the future.**
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## Recommendation 9b

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- ▶ The governing boards of the Santa Clara County school districts listed below should request assistance from the Santa Clara County Office of Education to standardize processes for informing taxpayers about parcel tax exemptions, administering application and renewal procedures, and setting due dates.
  - ▶ **Response: The districts need to set the procedures, but the Santa Clara County Office of Education could help by getting districts together, standardizing forms, and coordinating the notice process. We will bring this request to the attention of the County.**
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# QUESTIONS & COMMENTS

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