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Ventura County Grand Jury Announces Release of its Report Addressing Refund Delays in the Property Tax Assessment and Collection System

The Ventura County Property Tax Assessment and Collection System is highly complex and interdependent. The Assessor's department utilizes Oasis software to identify, track, and assess the value of property. Pertinent data are integrated with the Orbit system, which is used by the Auditor-Controller and Treasurer-Tax Collector departments. These departments use Orbit software to determine tax rates, calculate property taxes, prepare the tax bills, apply payments, and distribute funds to over 400 government agencies.

The primary processes of assessment, property tax calculation, invoicing, payment application, and revenue distribution are working well. However, there is work remaining to be done regarding property tax refunds. The Property Tax Assessment and Collection System software is not consistently handling the various recurring circumstances in which a property tax refund is warranted. Refund processing remains problematic due to software limitations, inadequate interdepartmental communication, and the absence of transparent monitoring mechanisms. There is a lack of internal metrics to categorize, quantify, and report on the status of potential refunds. Furthermore, no metrics are available to the public that would provide assurance that the delays in property tax refunds are being vigorously addressed.

The absence of formal procedures and metrics for tracking negative supplemental assessments exacerbates delays in refunds, leading to taxpayer frustration, dissatisfaction, and diminished trust in government efficiency. This Civil Grand Jury report highlights the progress that has been made, as well as the remaining challenges to address regarding the processing of property tax refunds.

The Civil Grand Jury makes recommendations to remedy these deficiencies and recognizes the efforts to improve the process.

To read the entire report, please go to <https://www.ventura.org/grand-jury/fiscal-year-2024-2025/>

The Ventura County Civil Grand Jury is a panel of 19 local citizens established to investigate public complaints about county, city or special districts management, practices and processes. More information about the Civil Grand Jury can be found at: <https://www.ventura.org/grand-jury/>