

WINDY

CENTRAL TEXAS: Warm and windy Wednesday turning cooler in afternoon with scattered showers. Fair and cool Thursday. Tuesday temperatures 55-64. Expected Wednesday 58-78. More data Page 24.

Vol. 45, No. 134

The Austin American

Austin, Texas, Wednesday, November 5, 1958

28 Pages

5 Cents

LONE ★
HOME

CAPITOL



By **RAYMOND BROOKS**
and **SAM WOOD**

The Research and Planning Council of San Antonio has done extensive study of the question of modernizing county government, and has published data on the proposed county home rule amendment.

This amendment is drafted for introduction in the January Legislature. It is being perfected by an informal, one-objective group of civic leaders of several of the larger cities, and not by the permanent League of Texas Municipalities which we credited it last week.

THE COUNTY home rule proposal, which may go to state voters in 1960, is the outgrowth of work done by the Harris County Charter Commission. This commission already has state recognition and official standing, in that it was created by the Legislature in a form to take appointment of members of local politics.

Houston's effort toward a modern form of county government has been prompted by several specific problems. One is that the big city is hemmed in, but growing very rapidly. Another is that it is fringed by "satellite" municipalities that are becoming "island cities" as Houston grows around them. Others are county-line frontiers, big seacoast industries that don't want to be within city limits. Houston actually has grown to take in about 700 acres of a state prison farm that in the past was far out in an unsettled area. Except for incorporated areas that Houston cannot annex — other than by consent of the other municipalities — Houston is reaching toward the time when it may occupy virtually all the county, and even overflow into other counties. The county has a multiplicity of separate school, navigation, irrigation, drainage, water and other taxing districts.

LEADERSHIP of the Research and Planning Council in the entire movement for county home rule, taking up when an ineffective amendment now on the books proved unworkable, has been recognized by all the citizen groups concerned with its success.

John F. Willmott of San Antonio, executive vice president of the Research and Planning Council has made the authoritative summary of county government needs and solutions, wrapped up in his address before the Tax Research Association of Houston and Harris County, last June on "The Coming Change in County Government;" and his address on "The County Home Rule Amendment," at a conference of League of Women Voters of Houston, Dallas, San Antonio and Fort Worth, held in Austin last month.

ON THE "coming change," "Willmott listed defects of present county government: "There is no head to it . . . no chief administrator . . . no effective coordination . . . no budget system, no long-term planning . . . The spoils system still holds full sway . . . The long ballot still persists in county government . . ."

County government is backward, he said, because it escapes citizen scrutiny; because county taxes seem low; because it is legally difficult . . . "almost impossible" . . . to change the structure of county government without constitutional change, and politically difficult to change because of partisan politics, patronage and political machines.

The coming change in county government, he predicted, will come through these steps:

Amending the constitution as now proposed, to let counties govern themselves as home-rule cities now do, by at least the four largest counties and probably others.

Establishment in these charters of a "coordinated, unified county government under a county council or other governing body with local legislative power like a city council.

"Creating the office of a chief administrator with appointing powers and responsibility for direction and control of all ad-

(See CAP A, Page 12)

GOOD MORNING

Genl. Insurance Service, Roy's
The Taxi Service, Texas State Bank,
resist Atlas Sewing Centers, Inc., Austin
California's Stockyard Corporation, Grigsby
resident and Company; Robbins, Mont-
resident gomery, Nieman, Hanks and Pur-
e con- year, and C. A. Schutze.

CAP A

(Continued from Page One)

ministrative activities, some
now under elective heads. This
executive may be a county man-
ager, appointed by the council;
an elective administrator like
the Houston mayor, or a modi-
fied manager or chief admin-
istrative official who may be
the executive assistant to an
elected (mayor) type of chief
official, as in New Orleans or
the county home-rule govern-
ment of Los Angeles County.

"**COMPLETE** reorganization
of county administrative agen-
cies . . . including scientific,
non-political personnel admin-
istration."

And, getting close to the in-
escapable question of city-county
merger after a county has
achieved home-rule status: "In-
auguration by home rule coun-
ties of urban type services,
such as water supply, sewerage,
regulation of transportation,
health and hospitals, planning
and zoning, traffic control, wel-
fare, police and fire protec-
tion . . . special service and
taxing areas can be established.
They will prove more satisfac-
tory than incorporation of tiny
municipalities which are gen-
erally uneconomic unless they
contain taxpaying industries or
wealthy citizens with luxury
tastes and a high degree of tax
tolerance."

These, Willmott told the pub-
lic groups, "are the changes
that are going to take place in
county government here in Tex-
as during the next few years."

Jobs Are Decreasing

LONDON (AP) — The United
Kingdom's unemployment total

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November 14, 1958

Mrs. Horton Wayne Smith, President
League of Women Voters of Texas
1007 West 24th Street
Austin 5, Texas

Dear Mrs. Smith:

Is the attached list of local league presidents up to date?
If not, could you send me a corrected one?

Sometimes we publish reports which would be of general interest to civic organization in other cities, so we try to keep our lists up to date.

We are today sending some material on Home Rule to the editors and publishers throughout the state.

With kindest regards, I am

Sincerely yours,



John F. Willmott
Executive Vice President

JFW/gj
Encl: (Mar. 25 list of
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League of Women Voters of Texas

Sixth Biennial Convention
March 25-27, 1958

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HUBERT W. GREEN, SR.

November 3, 1958

Mrs. Horton Wayne Smith, President
League of Women Voters of Texas
[REDACTED]
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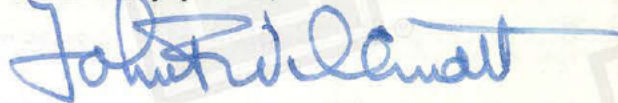
Dear Mrs. Smith:

Thank you for your good letter. It is I who should thank you for the hospitality which you extended to Agnes and myself.

The reaction of the audience that night was most encouraging. The League here in San Antonio is working actively on the subject. We are having Jerome Crossman of Dallas here to speak to us Wednesday, and several League members will attend.

With kindest regards, I am

Sincerely yours,



John F. Willmott
Executive Vice President

JFW/gj

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October 27, 1958

Dear Mr. Willmott:

A belated note to express again to you my own and the League's great appreciation for gaining our conference last week. Some very tangible results are already showing themselves -- something I wasn't too sure of that night, I must confess. But the League works in strange and mysterious ways sometimes, and I'm confident this will be one of those times.

In particular, I am hopeful that more way of cooperative action with other interested groups may be developed. Anything you may have to advise in this direction will be gratefully received.

Again, my thanks to you and to Mrs. Willmott for the very special effort you expended for the League.

Most sincerely,

Mrs. Horton Wayne Smith

Mr. John F. Willmott, Executive Vice President
Research and Planning Council
National Bank of Commerce Building
San Antonio 5, Texas

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October 3, 1958

Mrs. Horton Wayne Smith, President
League of Women Voters of Texas
[REDACTED]
[REDACTED]

Dear Mrs. Smith:

I am honored indeed by your invitation of October 1.

reserved
Jus It will be extremely difficult for me to be in Austin on the evening of October 21, as I am in Dallas that week, attending the convention of the International City Managers' Association and I am scheduled to address that convention the following day, namely the 22.

However, I have been making sacrifices for the League all my life and my wife says that I should do so this time! We think that we can drive back from Dallas for that evening, so I think you can count on it.

Swyer Please make a reservation for us at the Commodore Perry for that night.

Sincerely yours,

John F. Willmott

John F. Willmott
Executive Vice President

JFW/gj

*send him a note -
we are so pleased - reservation has been made -
I will write him next week when I return -*

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October 6, 1958

Mr. John F. Willmott
Executive Vice President
Research and Planning Council
San Antonio 5, Texas

Dear Mr. Willmott:

We are so pleased that you will be our speaker and guest at the Commodore Perry Hotel here on the evening of October 21st.

We have made a reservation for you and Mrs. Willmott at the hotel.

Mrs. Smith is out of town this week but I know she will want to send her personal thanks to you for your generous sacrifice of time away from the convention in Dallas at that time.

Sincerely,

Dwyce Cockrell
Executive Secretary

TO: Commodore Perry Room Reservations
Please send Mr. Willmott a confirmation for the twin bedroom we reserved for him on the phone this morning. As he will be a guest of the League of Women Voters of Texas, please put his room bill on our bill.

bc: Bridwell

October 14, 1958

Dear Mr. Willmott:

Indeed we do not want you to take "90 seconds" -- the copy of your speech reminds me again that this subject is a terribly exciting one and even League members need every word that you wrote. What happens afterward is always debatable at a League meeting, but we can be sure that there will be a real discussion of the pros and cons and the ifs and ands. You know, I'm sure, that only the Leagues in San Antonio, Houston and Dallas can take official League action, since they are the only ones with a position on the subject of home rule for their counties. The state board must decide, at its meeting in November, how much and what kind of information on the proposed amendment can be given all Leagues in Texas -- and your help at the conference on the 21st should give us the direction we need.

Dinner will be at 6:30 Tuesday evening at the Commodore Perry, but you will have to inquire about the room for they haven't yet given us this information.

I have one other question, Mr. Willmott, about which I hope you will be very frank. After your comment about the release of the text of the amendment, I'm probably very much out of order. But I should so much like to invite a few "outsiders" to sit in on this session -- perhaps some members of the Capitol press or Senator Herring of Travis County. I'm not thinking about making news, but about getting this information to people who can be very influential when the amendment gets to the Legislature. Suppose we leave the subject like this -- if you don't reply, I'll do nothing about inviting anyone. But if you think it might be helpful, then I'll appreciate your suggestions as to who should be invited to sit in on the meeting.

We're looking forward with the greatest anticipation to your visit.

Most sincerely,

Mrs. Horton Wayne Smith

Mr. John F. Willmott, Executive Vice President
Research and Planning Council
111 Soledad Building, San Antonio

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EXECUTIVE VICE PRESIDENT

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October 10, 1958

Mrs. Horton Wayne Smith, President
League of Women Voters of Texas
[REDACTED]
[REDACTED]

Dear Mrs. Smith:

Here is the talk which I have worked up on the County Home Rule Amendment. This may be much too long for your purposes and can be reduced to any time limit you want to set. If you want me to just take 90 second giving the highlights of the Amendment and then shut up ... just tell me and I will do that.

The first two pages may seem superfluous for sophisticated League members. However, I have recently been astounded to discover that many of our own directors have only the foggiest notion about the purposes and programs of our organization despite all the reports we have sent them. Only the other day, Mrs. Gerhardt publicly deplored the appalling ignorance of our more intelligent citizens. I do not think we should leave any stone unturned to make certain that the basic reasons for Home Rule are in sharp focus in the mind of every League member.

Even yet, the Houston people have not released the text of the Amendment, but I am clearing my speech with Mr. Holman and feel sure that he will consent to this presentation.

Sincerely yours,



John F. Willmott
Executive Vice President

JFW/gj
Encl: Austin Speech

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For the introducer
This, too, can be cut.

JOHN F. WILLMOTT

Summary of Professional Record

JOHN F. WILLMOTT, Executive Vice President of the Research and Planning Council of San Antonio, is a graduate of Amherst College and the National Institute of Public Administration, and has had 36 years experience in the field of public administration.

Mr. Willmott was formerly Assistant Secretary of the International City Managers Association and Associate Editor of Public Management. He has been a staff member of the Municipal Finance Officers' Association, Public Administration Service, and the United States Bureau of the Budget in Washington. He has been on the staff of citizen governmental research bureaus in San Francisco, Kansas City, Kansas, Chattanooga, and Miami. He has conducted surveys of state and local governments in 14 states.

While in Maryland, Mr. Willmott served as research chairman of the Montgomery County Charter Committee which brought about the adoption of a Home Rule Charter for that county. During his nine years in Miami, he issued several reports on Home Rule and Metropolitan government.

But his chief claim to fame is that he is a League husband!

FOUR STAR BOND

SOUTHWORTH COLLEGE

THE COUNTY HOME RULE AMENDMENT

By John F. Willmott, Executive Vice President
Research and Planning Council, San Antonio, Texas

Remarks at a Conference of the Leagues of Women Voters of
Houston, Dallas, San Antonio, and Fort Worth held in Austin,
Texas,

October 21, 1958

It is an honor and a privilege to be with you this evening and to explain the proposed County Home Rule Amendment to the State Constitution. As I know so well, from personal contact with the League of Women Voters in Connecticut, in Maryland, in Florida, and now here in Texas, the League is a very sophisticated organization. League members understand government. They know what Home Rule is all about. At least, that is true of the League member under whose supervision I have been operating for the past 36 years.

The Why and Wherefore

Nevertheless, let's take just a moment to refresh our memories and get very clearly in mind the why and wherefore of this proposed Constitutional amendment. As League members, you will be called upon many times to answer certain questions as to what's wrong with our present governmental setup and why it should be changed.

When we think of county government certain adjectives immediately come to mind: backward, antiquated, disorganized, wasteful, inefficient, political. Now these are not the adjectives ... in fact they are almost the exact opposite of the adjectives ... which we use to describe our city governments. Why is this? We need to understand this very clearly or we shall miss the whole point of the proposed County Home Rule Amendment.

The reasons for this difference between city and county governments is fourfold. In the first place, the structure of county government and its administrative practices, unlike those of city government, are essentially rural and country-fied. They were designed to meet the needs of sparsely settled areas with few public services and extremely primitive conditions and standards. That is the first basic difference between city and county government.

In the second place, there is no head to county government... no official or group of officials who can be held accountable for the efficient and economical operation of the county government as a whole. In fact, we do not have a county government at all. We have several little governments which, in actual practice, are more or less independent of each other and do not always get along well with each other.

A third difference between city government and county government is that city government generally has a short ballot with few elective Offices and a non-political merit system for personnel administration. In county government, on the other hand, we still have the long ballot and the political spoils system for filling jobs. The whole setup reeks of politics.

The greatest difference, however, between city and county government in Texas and elsewhere stems from the fact that cities ... particularly the larger ones ... frequently have Home Rule. More than 1,000 cities in 22 states have Home Rule Charters, whereas only 30 counties in the country have such charters.

The cities represented here this evening have adopted Home Rule Charters which establish the form of government, the powers and duties of officials and the manner of performing these duties. Within certain broad limitations, our cities can shape their own destiny and choose the kind of government they want. If the voters of our cities aren't satisfied with the government they are getting, they can change it. That's Home Rule.

Texas counties, on the other hand, have no real Home Rule. Citizens of a county cannot adopt local charters, nor can they choose or change the basic organization of county government.

The large urban counties of Texas are being increasingly called upon to furnish city type services and to maintain urban standards of service. Yet these counties are hamstrung at every turn by antiquated organization and by a governmental setup which is totally unsatisfactory for meeting urban and suburban needs. Worst of all, this whole system is frozen ... 1876 style ... in the State Constitution.

Attempt to Secure Home Rule

In 1933, a County Home Rule Amendment was added to the State Constitution in an attempt to correct this condition. High hopes were held that this amendment would be used to effect a substantial improvement of county government, particularly in the large metropolitan counties. That amendment still stands in the Constitution, but no county charter has ever been adopted thereunder and none is likely

to be, because the 1933 amendment and the accompanying enabling act are complicated, contradictory, and restrictive ... simply unworkable.

Quite recently, there have been concerted efforts to draft a new Constitutional Amendment which can be used by those counties which desire to have a Home Rule charter. You all know about the outstanding report of the Harris County Home Rule Commission which was released a little more than a year ago and which strongly recommended a new Home Rule amendment. Some of you have also seen the reports on this subject which have been issued by our own organization, the Research and Planning Council of San Antonio.

Partly as a result of these reports and subsequent conferences called by the Chambers of Commerce of Houston, San Antonio and Fort Worth, a new Home Rule Amendment is being drafted and a state-wide organization called the Texas County Home Rule Association has been formed. The Leagues of Women Voters in the four large counties have been ably represented at these conferences. Another one will be held in Dallas this coming Saturday, October 25.

Highlights of the Proposed Amendment

The proposed amendment is being drafted by able attorneys and students of constitutional law assisted by civic leaders ... including League members ... from the counties represented here this evening. The amendment is not yet in final form, but I can tell you how it stands at the moment.

This amendment authorizes any county within a given population bracket ... which has not yet been definitely decided ... to adopt a Home Rule charter. Upon presentation of a petition signed by the required number of voters followed by a favorable vote at a referendum election, or upon passage of a resolution by the Commissioners Court, the District Judge or Judges will appoint a charter commission of 25 members. The Commission must, within 12 months and after public hearings, present a charter which is then submitted to the qualified voters of the county for their approval.

Such a charter must provide for subsequent amendment by the voters, but no charter may be amended more often than every two years.

The charter will specify the form of government, also the terms, compensation, and mode of selection of county officers. It may consolidate, organize, reorganize, or abrogate (i. e., abolish) any county office or department, whether created by statute or the Constitution.

The charter must provide for creation of a County Court of Record with original jurisdiction in all cases at law, equity, and probate not within the exclusive jurisdiction of the District Court.

A Home Rule charter may grant reorganizing powers to the governing body of the county, but no such charter may affect legislators "or other state officers or state courts". You may wonder whether this wording prohibits changing the offices of sheriff and assessor from an elective to an appointive status. I cannot say; some attorney will have to answer that question.

Under the terms of the proposed amendment, broad powers may be given to counties by Home Rule charters including, but not limited to, powers already granted to counties or to a Home Rule city by any general or special act, notwithstanding any other provision of the Constitution.

Such counties will have taxing and borrowing powers. Taxing power is limited to 2-1/2% of the assessed valuation in the county except that in the case of partial or complete consolidation, an additional tax may be levied in the area involved in which the county has assumed the new responsibilities.

A Home Rule Charter may provide for assumption by the county of part or all of the functions of any political subdivision of the county with the consent of the voters of such a unit. Of course assumption means consolidation, either complete or partial (i. e., functional consolidation). In the event of such assumption the charter will establish an urban tax levy in the consolidated area and a non-urban tax levy for the rest of the county.

Some people believe that Home Rule is another name for city-county consolidation. That's not true. A county can have Home Rule without any consolidation whatsoever. Very few of the Home Rule counties have consolidation. On the other hand it would be extremely difficult, if not impossible, to have a successful consolidation without Home Rule.

The charter may provide for districts for purposes of local government, such as zoning, fire fighting, sewage disposal, water supply, etc. Such districts may be administered by separate boards or through the county's governing body. In either case, they would have the powers granted to such governments by the Constitution and laws of the State.

This amendment, if adopted, will be self executing: i. e., it requires no enabling legislation and can be used by any county coming within its terms as soon as it takes effect. It supersedes any inconsistent provisions of the Constitution. Of course, the courts sometimes have their own notions about such matters and have, in some states, whittled Home Rule down to a shadow of its original substance. However, that is not a problem which need concern us at this time.

Procedure

A proposed Constitutional amendment must first be approved by the Legislature and must be submitted by it to the voters of Texas. It will then be voted

upon at a general election. Of course, if the amendment is loaded with crippling amendments in the Legislature, it may be as useless as the 1933 amendment has been.

In both of these stages ... legislative approval and voter adoption ... there will be need of non-partisan, impartial organizations such as the League of Women Voters to explain the proposition and the need which it seeks to meet. It will also be necessary to refute the half truths and untruths which will be disseminated by those who fear that their political jobs may be abolished or that certain administrative offices which are now elective may be filled by appointment on the basis of merit, once the voters of a county gain effective control over their county government.

Forward-looking county officials favor County Home Rule because they know that Home Rule is the key to better county government. Some of our county commissioners in Bexar County are in favor of Home Rule and there are others who share this view. However, at the convention of the County Judges Association in Dallas two weeks ago, a resolution opposing County Home Rule was passed with but one dissenting vote ... cast by a county commissioner from Bexar County.

Now in California, which is one of the most progressive states in the nation from a governmental standpoint, the County Supervisors Association is actively promoting Home Rule. Mr. Wm. R. MacDougall, General Counsel and Manager of the Association declares:

- "1. Without home rule, the form and structure of county government remains in a 'deep freeze'".
- "2. Without home rule, the State Legislature will dictate the counties 'housekeeping rules', even those of minor importance."
- "3. Without home rule (operating through law or tradition) there will be callous dumping of new governmental costs on counties."
- "4. Without home rule, there is a deprivation of any choice as to acceptable ways of accomplishing the same governmental objective."

The Home Rule principles worked out by the County Supervisors Association of California were adopted unanimously by the National Association of County Officials at its convention in Portland, Oregon, two months ago. It is easy to see which way the wind is blowing.

A Long, Hard Battle

The securing of County Home Rule, like any other basic governmental reform, will be a long, hard, and discouraging battle. We have no right to expect anything else.

Two weeks from today ... on November 4 ... the voters of Cuyahoga County (Cleveland) and Lucas County (Toledo) will vote on the proposition of creating charter commissions to draft and submit Home Rule Charters to voters of these two counties. Civic leaders in Ohio have been trying for 30 years to secure a workable County Home Rule Amendment to the Ohio Constitution and have just now succeeded in doing so. Now they are moving to make use of it.

On the same day, November 4, the voters of Colorado and Minnesota will have an opportunity to approve County Home Rule Amendments to their State Constitutions. And voters in New York and Oregon will pass upon amendments to extend and amplify the Home Rule powers already granted to counties by their respective constitutions, just as we are preparing to do here in Texas. You may be sure that these new propositions in New York and Oregon did not reach the ballot without a lot of hard work by a lot of people.

I have here in my hand a recent newsletter of the Municipal League of Seattle which reports the successful passage of the metropolitan proposal by the voters of Metropolitan Seattle on September 9 ... on the second try. The newsletter contains this significant sentence. "Now is the time to recall the endless hours of work, over a period of many years, that made Metro possible."

Five or ten years from now we will recall "the endless hours of work, over a period of many years," that made County Home Rule possible here in Texas. And when we reach that point... when we look back upon the struggle and look forward to the possibilities of better county government in Texas... we will say, "It was worth it!"

Research Is Essential To Good Government

Research, both fundamental and applied, is as essential to good government as it is to national defense and economic progress. San Antonio is fortunate in having the Research and Planning Council, a nonpolitical citizens agency dedicated to what may be called applied research in good government at the local level.

Voluntarily supported by 300 public-spirited members, the Council's work is directed by John F. Willmott, with President Ray Erlandson heading a 70-member board that is broadly representative of this community's civic leadership.

Further support should be forthcoming to enable the Council to double its staff of three and increase its \$35,500 budget to better carry out these stated purposes:

"To cooperate with and improve the local governments of Bexar County through objective fact finding, to expose waste and inefficiency wherever it exists, to help officials do a better job, and to help citizens and taxpay-

ers do a more effective job of watching and controlling their governments."

Such research agencies are spreading and strengthening throughout the country, at both local and state levels. They are the best antidote we know to the demagogue, the political boss and the bureaucratic grifter. The agency here has had a leading role in what it is hardly exaggeration to call San Antonio's postwar civic renaissance.

The Council's annual meeting tomorrow will spotlight the awakening county-home rule movement, a long overdue reform. We should all appreciate the groundwork being laid for that task here by a research agency which puts no interest above the public's.

December 3, 1957

Research and Planning Council
San Antonio, Texas

1957 REPORT OF EXECUTIVE VICE PRESIDENT

This report covers the period from March 10, 1957 to date. During these nine months, the Council has done the following things:

1. At the outset, the board adopted definite policies to govern Council operations. Your Executive Committee has met almost weekly and has exercised continuous control over staff operations. All staff reports and other actions of consequence have been submitted to the Executive Committee and approved by it before release.
2. Plans have been formulated for more active participation by the the board of directors in the work of the Council.
3. Four advisory committees (Legal, Accounting, Assessing, and Personnel) have been set up and a fifth (Planning) is now being created. These committee help plan our research projects and review research reports before they are submitted to the Executive Committee. Here again, we are trying to get more members actively participating in the work of the Council.
4. An energetic publications program has been established. During the past nine months our members have received 12 newsletters and three research reports on these subjects:

County Home Rule
City and School Budgets
City and County Bond Issues
Organization of the Bexar County Government
The County Manager Plan
County Budget Methods
Legal and Personnel Costs in the City
Government
Recent Developments in the Field of
Local Government
County Salary Standardization
Major Administrative Problems of the
San Antonio Water Board

5. The Council's reports on County Home Rule have attracted widespread attention throughout the state. Your executive vice president has been chosen as one member of a steering committee to formulate a new County Home Rule Amendment to the Texas State Constitution.
6. Two additional reports are now being prepared, and will appear in December or early in January, (1) Urban Renewal and (2) A Proposed Merit System for Bexar County.
7. The County Fiscal Survey has been our major research project this year. It should have been completed months ago, but has been delayed by other projects and had to be suspended altogether in October, due to staff and budgetary limitations. It will be resumed January 1 and completed early in 1958.
8. Another important research project: the Survey of Suburban Municipalities has been delayed for the same reasons, but will be completed during 1958 if sufficient funds are available . . . and we believe they will be.
9. Our research and public relations programs have been held to a slow pace this year, because of the urgent necessity of organization building, reorganization and retooling of the headquarters office, getting the Council out of debt, and putting Council finances on a sound basis.
10. Since last March, we have paid off \$3,834 of indebtedness. We still owe \$1,000 on a bank note which we hope to pay off before December 31. When we do that, the Council will be debt free for the first time in four years. We aim to keep out of debt from now on.
11. A Mailing list of 500 membership prospects has been set up at Council headquarters. Frequent mailings of Council reports will be sent to these prospects. A Membership Committee is now being formed to conduct a continuous, year-round membership and financial campaign. The Finance Committee, headed by Harry Jersig, will continue to help with special cases and special projects.
12. We have had a harmonious and moderately productive year, but we are only scratching the surface and we know it. To do this job properly, we need a budget of \$50,000 a year, compared to our 1957 expenditures of approximately \$31,000. The Morale of our team is high and we have a tremendous job to do in this community. We have strong membership support and good cooperation from our public officials. That is why we expect great gains during the year which is about to begin.

Respectfully submitted,

John F. Willmott
Executive Vice President

WHAT IS METROPOLITAN GOVERNMENT?

By John F. Willmott, Executive Vice President,
Research and Planning Council, San Antonio, Texas

Informal Presentation to the Organizing Committee*
August 9, 1960

Nature of the Problem

Cities everywhere are bursting their boundaries. There is an ever accelerating, outward movement of people into the suburbs and beyond ... way out into the woods. These people want city type services and service standards. They cannot get them from the ordinary county government because it isn't organized or equipped or financed to do that sort of job.

Incorporation of new suburban municipalities sometimes solves the immediate problem, particularly if there is a fairly high taxable valuation to support the new government and a supply of capable individuals to administer municipal services. In some metropolitan areas, such as Chicago, some of the suburban municipalities furnish better service than the central city.

Sometimes, on the other hand, small suburban municipalities haven't the financial or personnel resources to do a good job. Where that is true, they flounder in inefficiency and constant trouble.

Even if the suburbs are well governed and strongly financed, many problems arise which are beyond the jurisdiction and control of individual municipalities and can only be solved by area-wide action. Examples: water supply, sewerage, arterial highways, transit, etc.

Meanwhile, there is everywhere growing taxpayer unwillingness to support several overlapping layers of government, particularly where there is inefficiency, duplication, and waste. Sometimes officials of overlapping governments spend much time fighting each other instead of attacking the basic problems of the metropolitan area, such as uncoordinated planning and waste in government.

* The Organizing Committee consists of fifteen members ... five from the San Antonio Chamber of Commerce, five from the Mexican Chamber of Commerce, and five from the Research and Planning Council. The Organizing Committee is charged with the responsibility of organizing a broad based Metropolitan Area Study Committee in Bexar County.

Extent of the Problem

Virtually every large and growing city has metropolitan growing pains ... or metropolitan sprawl as it is sometimes called. This has become the number one problem of local government and is being studied across the nation by governors, legislatures, local officials, and civic organizations. Here is a report which lists a total of 112 state and local surveys of metropolitan problems which have recently been undertaken in 27 states and in one province of Canada. Among those listed is the survey now being conducted by the Research and Planning Council of San Antonio.

A statewide survey is also being conducted by the Texas Commission on City and County government, an interim commission of the Texas Legislature. However, that commission has no appropriation and will not be able to undertake an active program.

Methods for Dealing with the Problem

All right ... so that's the problem. Now what can be done about it?

Various solutions have been developed in different metropolitan communities. There are ten basic types. I'll describe them briefly.

1. Annexation of unincorporated areas and, in some cases, suburban municipalities to the central city. This device is well known in Texas where it is the subject of controversy which is likely to result in legislative action next year.
2. Special (Ad Hoc) Districts. A special district or authority is created to operate a particular service (water supply, sewage disposal, parks, hospitals, etc.) in part or all of the metropolitan area. Existing city and county governments remain intact except for the function transferred to the special district.
3. Functional Consolidation. Individual functions (examples: water supply, sewage disposal, health, hospitals, schools, welfare, assessing, tax collection, etc.) are transferred from one or more municipalities to the county government ... or from the county to the city as was done in Atlanta (1951).
4. Contractual Services. Sometimes, municipalities contract with the county or with some other municipality for certain services. San Antonio sells water, electricity, and sewer service to suburban municipalities and library service to the county. And there are all sorts of cooperative arrangements; such as, cooperative purchasing by city, county, and schools in Cincinnati and cooperative statewide purchasing by cities on state contracts or on agreements negotiated by a state league of municipalities as in Michigan.

Los Angeles County, a highly urbanized county with a modern, efficient county government, furnishes 41 different services on contract to any of its 63 municipalities which wish to enter into such contracts. One city, Lakewood, contracts with the county for practically all of its operating services. I have here a list of these contracting cities and the services which each city elects to receive from Los Angeles County.

5. Complete ... or virtually complete ... consolidation of city and county under a single government. Examples: New Orleans (1805), Boston (1822), Philadelphia (1854), and New York (1898). In none of these cities is the consolidation 100% complete; a few traces of the dual setup remain.

6. City-County Separation. The central city is consolidated with the urban portion of the county. The rest of the county is torn away and becomes a separate county or part of another county. Examples: Baltimore (1851), San Francisco (1856), St. Louis (1876), and Denver (1902). Except in the case of Baltimore, the city's area was increased at the time of separation, yet none of these cities covers as much as one-twelfth of its present metropolitan area. Virginia cities of over 5,000 population are automatically separated from their counties. Residents of these cities do not live or vote in any county and do not pay county taxes.

About 30 years ago, San Francisco tried to persuade San Mateo County, which was separated from San Francisco in 1856, to reunite. This pleading fell upon deaf ears and San Francisco has now turned to other measures, such as the Metropolitan Rapid Transit District, an ad hoc body, and the Association of Bay Area Governments which I shall describe in a moment.

St. Louis is also trying to revoke its separation of 1876. There is a strong movement there for consolidating St. Louis County and the City of St. Louis.

7. Abolition of Counties. Connecticut has recently abolished all of its counties. Connecticut is a small, compact state practically all of which is divided into cities and towns which are equipped to furnish all local services. These conditions do not exist out in the great open spaces of Texas.

8. Interlocking Government. Baton Rouge (1949) is a special case. There the parish (county) and city governments are preserved and their revenues and expenditures kept separate, but the two governments are interlocked. The police jury (governing body of the parish) consists of the seven city councilmen plus two members elected from the rural areas. The mayor or president is elected by parish-wide vote. He presides over both bodies and has administrative powers.

9. Federation. A metropolitan government is created to perform county functions and city functions of metropolitan concern throughout the entire area. Municipal governments remain in both the central city and its suburbs and they retain legislative and administrative control over local (non-metropolitan) functions. Two examples, both recent: Toronto (1954) and Miami (1957).

This type of metropolitan government with its easy immediate impact upon suburban municipalities and its flexible provisions for future development ... if and when desired by the people of the area ... stands in sharp contrast to the drastic types of consolidation which have been carried out in some jurisdictions and proposed in others.

10. Regional or Metropolitan Councils. A new and interesting device now coming into use is the metropolitan regional council consisting of officials of city and county governments in a metropolitan area who meet for discussion and consultation on common problems. One of these is already at work in the New York Metropolitan Area which includes parts of New York, Connecticut, and New Jersey. This council plans to study and report on problems concerning the people and governments of the metropolitan region, including but not limited to traffic and transportation, recreation, land use and open space, air and water pollution, water supply and waste disposal, regional planning, and housing redevelopment.

I also have here the by-laws of the Association of Bay Area Governments recently organized by representatives of 83 cities and nine counties in the San Francisco Bay Area to provide a forum for discussion and study of metropolitan area problems and to facilitate the development of policy and action recommendations for solution of such problems.

Neither of these associations is a unit of government. Neither of them will operate any metropolitan function or exercise governmental powers or regulate anything or anybody, so we cannot say that they are a type of metropolitan government. They represent, instead, an alternative to area-wide metropolitan government. Both of these associations have strong leadership and strong support, and I predict that they will produce results which are both significant and fruitful.

Other regional councils have been formed in Omaha, Washington, D. C., and the Mid-Willamette Valley of Oregon.

Our Approach to the Problem

I have just outlined ten basic solutions which have been adopted or proposed in different metropolitan communities. Later on, we shall have detailed reports on each of these plans.

Situations differ. What suits one community and works well there may not be right for another community. Each plan should be fitted to local needs and desires.

If I were to walk up to one of you and prepare to take out your appendix, you would know I was insane. I don't know anything about your appendix. I have never even seen an x-ray of it and, if I did, I wouldn't understand it. I have no competence whatever to examine your appendix ... much less operate upon it.

No drastic operation should ever be performed on the governmental structure of any metropolitan area without complete x-rays, and with technical competence of the highest order to assist in the diagnosis and in the conduct of the operation. It is for that reason that our Research and Planning Council is starting a Survey of Metropolitan Government in Bexar County which will take three years and will cost \$30,000. This survey will be conducted by our own staff supplemented by special consultants. It will cover all local governments and governmental services in Bexar County and will explore the advantages and disadvantages of various types of metropolitan government.

The findings and recommendations of this survey will be submitted to the Metropolitan Area Study Committee, the group which you are going to organize. That committee will then develop the ultimate plan and submit it to the people of Bexar County.

The Research and Planning Council will undertake this survey with open minds and without prior commitments or preconceived notions of any sort.

It is amazing how many people have jumped to the conclusion that this is all a plan to consolidate the city and county. That is one of several possibilities which will be considered, but it is unlikely that it will be the one selected. Complete city-county consolidation has not taken place anywhere in the United States since the turn of the century and is not likely to be adopted anywhere in the near future except perhaps in St. Louis where special circumstances exist.

The first stage of our survey will consist of a review of similar projects in other metropolitan communities across the nation. We have arranged an exhibit of recent reports on the subject and I would like to show them to you now.

Opposition is Inevitable

This undertaking, in which you will play such a vital role, will not be any picnic. While we cannot now predict the outcome, it is bound to result in some proposal for governmental change. That takes time ... and infinite patience.

Proposed charters involving some type of metropolitan government were defeated recently in Albuquerque, Cleveland, Knoxville, Nashville, and St. Louis, due to strong opposition, but carried in Miami and Seattle despite opposition.

There is always opposition to governmental change and hysterical misrepresentation by office holders who fear that their jobs may be abolished or their political power ended. Citizens and voters won't accept change unless they are shown why it is needed ... and they are absolutely right in insisting on that.

There will also be crackpot opposition. I have here several pamphlets charging that metropolitan government is a subversive conspiracy to establish world government, erase state, county, and other governmental boundaries, abolish all elective offices, take away our right to vote, and set up a dictatorship, all this being engineered by ... guess who ... Governor Nelson Rockefeller of New York State.

As I am sure you will realize, every one of these fantastic charges is a lie and the obvious work of crackpots. You will hear sillier charges than those during the next three years.

There is need for a broad based study committee here in Bexar County to investigate, weigh the possibilities, harmonize conflicting views, and propose a course of action which will be acceptable to our people. This is a job which challenges our best thinking, our patience, our good sense, our fairness, and our devotion for it will determine the future course of local government and local taxation in this community for years to come. Let's get moving.

CONFIDENTIAL

NOT FOR PUBLICATION

JUN 1 REC'D

May 24, 1961

OFF THE RECORD

A Confidential Report to the Board of Directors
of the Research and Planning Council of San Antonio

About twice a year, we need to stop and take stock of our situation. Here is a quick summary of our current activities.

1. Our City Program

Long Range Financial Planning. For two years, we have been urging City Council to create a citizens advisory committee to work with officials and help them develop a proposed five year financial program for the city. At first, top officials did not like this idea. However, we kept on recommending it; we always do.

When the new City Council took office on May 1, they received a letter from President Roger Hill renewing our recommendation. Mayor Walter McAllister is an enthusiastic advocate of long range financial planning ... not just for the city but for overlapping taxing bodies as well. Prospects are excellent for early and favorable action on our recommendation.

City Budget. Two months from now, the proposed city budget will be under consideration by the City Council and the taxpayers of San Antonio. This will be one of the most baffling budgets in many years. We plan to make an analysis of the proposed budget and send it to our members.

2. Our County Program

County Home Rule. County Home Rule is the number one plank in our platform. We have said again and again that efficient and economical operation of our county government is virtually impossible until the county is completely reorganized under a home rule charter. That will require an amendment to the State Constitution.

A proposed constitutional amendment authorizing Bexar County voters to adopt a home rule charter has been pushed for two years by the Bexar County Home Rule Association. Although the association is small in numbers, its amendment has drawn substantial support and has gained considerable yardage. However, as I told you a year ago, there is strong opposition from officeholders all over the state and it is not likely that such an amendment will be approved by this Legislature or the next one. Even after legislative approval is received, there are three additional hurdles: (1) approval of the constitutional amendment by the voters of Texas, (2) approval by either the Commissioners Court or the voters of Bexar County of a petition to create a charter commission to draft a proposed charter, and (3) approval of that charter by the voters. A conservative prediction as to when we shall finally pass all of these barriers and secure a County Home Rule Charter: 1970.

Work With Advisory Committee. The newspapers have recently referred to an advisory committee of business and civic leaders ... most of whom are directors or former directors of our Council. This advisory committee has been studying the recent proposal for a bond issue to air condition the Court House and other long range proposals affecting the county government. Because of the close relationship between the work of that committee and our own program, we are working closely with them and will give them all the help we can.

This advisory committee has been prodding the Commissioners Court concerning its failure to act on the recommendations of the 1960 Ernst and Ernst Audit ... many of which affirm our own findings and recommendations of 1957 and 1958. As we have told you many times, our county government is a jungle of confusion, disorganization, irresponsibility, and tax waste. However, it is not likely that any action of consequence will be taken in the near future to remedy these conditions for the simple reason that there is no one in the Court House who has the authority and the administrative capacity to act. This underscores what we have been saying for years: that complete reorganization under a Home Rule charter is the only hope for lasting improvement of our county government.

3. Survey of Metropolitan Government

This brings us to our Survey of Metropolitan Government, the biggest project which this Council has ever undertaken. It is being watched by civic groups all over the State of Texas.

Let me refresh your memory as to the purposes, aims, and objectives of this survey as defined by this board and publicly stated on many occasions. We have said that this survey will cover all governments in the county and their functions, that we will study all types of metropolitan government which have been adopted or proposed across the nation, and that this survey will culminate in a proposed plan of government for Bexar County --- what Jack Pitluk, Jr. calls a Plan of Government for 1975.

Finally, we have stated that the findings and recommendations of this Council will be submitted to a broad based committee of officials, citizens, representatives of various areas and interests, and points of view and of various social, racial, and economic groups. This committee will ultimately draft the final plan which, it is hoped, will be both sound and politically acceptable.

This survey is being conducted by our own staff assisted from time to time by special consultants. One of them, Mr. Truett Marshall, a consultant with a nationwide reputation is with us this afternoon. He is our consultant on assessment and tax collection.

Within the next few months, we will bring to San Antonio one of the most distinguished city planners in America. He is C. David Loeks, the director of the Twin Cities Metropolitan Planning Commission in Minnesota. He will help us evaluate our present city planning setup and the planning activities in other governments in this area. He will then assist us in considering the possible desirability of a regional planning department or agency for this metropolitan area.

Our survey will take three years and will cost \$30,000, the money for which is coming from contributions to our Special Projects Investment Fund. The survey started on July 1 of last year and is now in its tenth month.

A number of preliminary reports suitable for study groups are now coming off the assembly line. The first of these dealing with the Bexar County Hospital District was issued on March 10. The second on Assessment and Tax Collection Organization in Bexar County is in your hands this afternoon. The third study on Fire Protection in Bexar County and the fourth on Purchasing Practices in Bexar County Governments will soon be ready. Other reports scheduled for this year will deal with Planning and Zoning and Water Districts of Bexar County.

On or before July 1, 1963, we hope to submit our final, overall report which will recommend a long range plan of local government ... a plan for furnishing efficient and economical governmental services to the people of Bexar County.

This survey will be a long, hard job. We had supposed that there were only 41 local governments in the county; we are now inclined to believe that there are nearer 50 and they have many functions and activities. The report in your hands this afternoon deals with just one of these activities.

4. We Need \$6,000

Until now, our Research and Planning Council has limited its activities to the City of San Antonio and the county government with only occasional attention to other governments. Now we are taking on all 41 ... or perhaps 51 ... local governments in Bexar County. Think of the enormous outthrust of our influence, the vast increase in our store of information, our widening circle of acquaintance with public officials all over the county, and our increased prestige among both officials and citizens!

You can see from what I have said that we are engaged in the most active program in many years and are covering more ground than we have ever covered. All this costs money. Our 1961 budget as approved by this Board in January called for raising \$42,000 this year of which \$12,000 will come from our Special Projects Investment Fund, leaving \$30,000 to be supplied by our general revenue. At present, we are \$6,000 short of that goal. In other words we need an additional \$6,000 this year. Your Executive Committee has voted to conduct a financial campaign either in June or September to raise this money and to keep this program going ahead at full speed.

I have always believed that, if an organization such as ours grabs hold of the biggest needs in the community and deals with them in a big way ... a way which demonstrates our self respect and commands the respect of the community ... it will be possible to raise the money necessary to carry on the program, particularly if the organization has strong leadership which we certainly have. That is why I am not worried about money. I worry every waking moment about the quality of our program but I leave the money problem to you and I am sure that it is in good hands.

John F. Willmott
Executive Vice President

RESEARCH AND PLANNING COUNCIL

A NON-POLITICAL CITIZENS' ASSOCIATION TO FIND THE FACTS, KEEP THE CITIZENS INFORMED, AND COOPERATE WITH OFFICIALS IN IMPROVING LOCAL GOVERNMENTS IN BEXAR COUNTY

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BOARD OF DIRECTORS

SUNDAY LIGHT

SAN ANTONIO TEXAS

A Constructive Force in the Community

SUNDAY, MAY 21, 1961

The Tax Jungle

BEXAR COUNTY is administered by a complex of little governments and taxing bodies, and nobody seems to know precisely how many there are. The total is between 40 and 50.

For the past 11 months, the Research and Planning council has been working on this jigsaw puzzle. The council is making a 3-year survey of metropolitan government in Bexar county, at a cost of \$30,000.

This survey is being made by the council's staff with the help of special consultants.

It will cover all local governments and governmental services in Bexar county and will "explore the advantages and disadvantages" of various types of metropolitan government.

This year's studies include the hospital district, fire protection, assessment and tax collection, purchasing methods, planning and zoning, and water districts.

★ ★ ★

The Research and Planning council believes that "metropolitan sprawl" is the biggest problem of large communities all over the country and especially in Texas. The council puts it like this:

"Metropolitan areas create problems and headaches for officials and taxpayers. Cities burst their boundaries. People move out into the suburbs and beyond. Houses spring up where woods and fields once stood.

"New needs arise. New taxing bodies are created and piled one on top of the other. Taxes are piled one on top of the other, too, with the taxpayer at the bottom of the pile.

"Many problems arise which are beyond the jurisdiction of individual municipalities and can be solved only by area-wide action, but there is no machinery for bringing that about. Instead, there is competition between officials of overlapping governments.

"The bewildered citizen cannot keep track of his many governments. Certainly, he cannot control them. Uncontrolled government always results in waste and excessive taxation."

★ ★ ★

Reports from the council's survey will be submitted to a committee of officials, citizens and representatives of various areas, interests and points of view and of social, racial and economic groups.

This committee will consider the findings and recommendations and will then draw a plan which, it is hoped, will be "both sound and politically acceptable."

This huge task ties in well with the work of Mr. H. B. Zachry's committee which is studying the long-range needs of Bexar county in relation to the courthouse.

We hope the two groups will exchange notes.

JUN 21 REC'D
May 19, 1961

Research and Planning Council
San Antonio, Texas

CONFIDENTIAL

MEMORANDUM **NOT FOR PUBLICATION**

TO: The Organizing Committee

FROM: Research and Planning Council

SUBJECT: ASSESSMENT AND TAX COLLECTION ORGANIZATION IN BEXAR COUNTY (Preliminary Metro Study No. 2)

The present organization whereby a score or more of governments assess and collect property taxes in Bexar County produces endless confusion and annoyance, widespread misunderstanding, duplication of work and waste of the taxpayers' money. One good assessing and tax collecting system serving this entire metropolitan area and its governments would give better service and save money. But there are serious legal and administrative obstacles which must be overcome before this goal can be achieved. It may be a ten year job. The sooner we start, the sooner we'll arrive.

Introduction

The total tax take in Bexar County from general property taxes this year is in excess of \$30,000,000. The system for apportioning this tax burden and for collecting these taxes is of the utmost importance to every taxpayer in Bexar County. The whole subject of proper organization for tax administration is an extremely important section of the three year Survey of Metropolitan Government in Bexar County now being conducted by the Research and Planning Council.

Our survey is far from complete. Our final report is not due until July 1, 1963. This preliminary report is submitted at this time at the urgent request of several members of the Organizing Committee. Even with the incomplete data here presented, it is clear what our goal must be and what we must do to reach it.

The field work on this study has been done and the report prepared by John F. Willmott, Executive Vice President of the Research and Planning Council and Walter Stoneham, Staff Assistant, with technical consultation by Truett B. Marshall, City Assessor of Austin, who was temporarily attached to our staff. Mr. Marshall is a past president of both the Texas Association of Assessing Officers and the National Association of Assessing Officers and a holder of the C.A.E. (Certified Assessment Evaluator) certificate. He has a nationwide reputation as an expert in this field.

We would like to acknowledge the excellent cooperation which we have received from assessing officers of Bexar County in the gathering of information for this report.

1. Description of Present Organization

According to the Texas State Tax Study Commission, there were at least 1,500 local tax assessors in Texas in 1958 - an average of nearly six per county. The commission's report declared: "Few states have as much overlapping in local assessment administration as Texas." We in Bexar County certainly have our share of this overlapping.

As yet we are not sure as to the exact number of taxing bodies in Bexar County or the total amount of taxes levied. Exact figures will appear in our final report. There are over 50 units of government in Bexar County possessing the power to tax. Present indications are that only 30 to 35 of these actually use their taxing power. To date, we have secured some information regarding 22 of these units including all of our major governments. This information is presented in Table 1.

Who Does Assessing and Collecting?

Five of these governments (Bexar County, the City of San Antonio, and the Northeast, Northside, and Edgewood Independent School Districts) do all of their own assessing, using their own employees. Four of these governments employ commercial appraisal companies to do their assessing and we understand that there are other units which follow this practice. Nine governments contract with overlapping governments for assessment and in most instances pay for the service. This payment is generally based upon a percentage of the total amount assessed or collected.

One government ... the San Antonio Independent School District ... uses two systems. It uses the city's assessing and tax collection system for property inside the city limits and does its own assessing for outside property. It makes no payment for such service. This arrangement, which was written into San Antonio's city charter at the time of its adoption was the subject of controversy two years ago when the Advisory Committee on Charter Revision was considering proposed amendments to the city charter.

The new County Assessor is using a new procedure this year. He has secured copies of, or access to, the assessment rolls of San Antonio, Alamo Heights School District, Northeast School District, Northside School District, and Judson Rural School District, and is using those assessments as a basis for computing his own assessments of property within those jurisdictions, using formulas which are explained below.

Thirteen of the governments for which we have information collect all of their own taxes. Eight contract with other governments for this service and pay various amounts therefor. Here again, the San Antonio Independent School District uses both systems as described above but makes no payment for the service.

Table 1

WHO ASSESSES AND COLLECTS PROPERTY TAXES IN BEXAR COUNTY?

Preliminary Tabulation - Incomplete

Name of Local Government	Tax Assessment By			Tax Collected By	
	Own Em- ployees	Appraisal Co.	Other Govt. Unit	Own Em- ployees	Other Govt. Unit
<u>6 Countywide Units of Government</u>					
Bexar County	x			x	
Hospital District			x		x
Junior College District			x		x
S. A. River Authority			x		x
Edwards Underground Water Dist.			x		x
S. A. Cons. & Recl. Dist.					
<u>16 Cities</u>					
San Antonio	x			x	
Alamo Heights		x		x	
Balcones Heights			x		x
Castle Hills			x		x
China Grove					
Converse					
Hill Country Estates			x		x
Hollywood Park					
Kirby					
Leon Valley					
Live Oak					
Olmos Park		x		x	
Shavano Park			x	x	
Terrell Hills		x		x	
Universal City			x		x
Windcrest					

<u>Name of Local Government</u>	<u>Tax Assessment By</u>			<u>Tax Collected By</u>	
	<u>Own Em- ployees</u>	<u>Appraisal Co.</u>	<u>Other Govt. Unit</u>	<u>Own Em- ployees</u>	<u>Other Govt. Unit</u>
<u>8 Independent School Districts</u>					
San Antonio	x *		x *	x *	x *
Alamo Heights		x		x	
North East	x			x	
Northside	x			x	
Edgewood	x			x	
Somerset				x	
Harlandale				x	
South San Antonio				x	

* Uses both procedures

Different Ratios and Different Bases

These various governments assess at different ratios or stated percentages of estimated market value. This is called fractional assessment.

Many assessors issue public statements telling what ratio they use and they change it from time to time. Within the past few days, the Bexar County Assessor has stated that, if the total county assessment roll is increased by \$70,000,000 this year, he will reduce his ratio from 28% of full value to 25%.

Although Texas statutes require "full value", the courts have ruled that the State Constitution permits fractional assessment and the practice is in common use in Texas. The Texas Commission on State and Local Tax Policy declares in its preliminary report (January, 1961) to the Governor and the Legislature:

"Several troublesome points arise in the rendition and assessment of property because of variance between statutory "full value" as the professed standard and fractional assessing as the universal practice ...

"Oaths are signed each year only because of their ambiguity and the necessity of getting the job done. The assessor swears that he has valued property at its cash market value; but does not come right out and say that he assessed it at that value ... The members of the Board of Equalization of every county falsely swear every year that they will not allow any property to be assessed on the rolls at less than cash market value ...

"Any attempt to bring the basic state property tax law into conformity with the field practice of fractional assessing would require most careful revision of articles controlling rendition, assessor's duties, and powers of the assessor, boards of equalization and governing bodies. Any proposed revision should receive the careful scrutiny of public officials and taxpayers throughout the State before being submitted for legislative consideration."

The commission's report, like ours, is a preliminary report and its survey like ours, is a three year one. The commission's final report due in 1963 will doubtless contain recommendations for revision of this and other phases of the tax laws of Texas.

In addition to fractional assessing, different governments in Bexar County use different base years in assessing. For example, the City of San Antonio assesses at 60% of 1953 value which the assessor believes works out to approximately 45% of current market value. Bexar County assesses at 28% of current value. The City of Alamo Heights assesses at 50% of 1941-42 value and the Alamo Heights School District assesses at 40% of current value.

In January of this year, a new County Assessor took office and was at once confronted with the task of making the annual assessment for presentation to the Commissioners Court sitting as a Board of Equalization on or before August 1. He was committed to a program of equalizing assessments and remedying existing abuses, yet the system he had inherited was not readily adaptable to the new program without extensive overhauling ... or perhaps replacement by a modern system.

Accordingly, he decided to take the assessments of various cities and school districts and apply a percentage factor to each assessment in computing his own (county) assessments. These percentage factors, which are designed to adjust all assessments to 28% of current market value, are as follows:

<u>Unit of Government</u>	<u>% Figure Applied</u>
City of San Antonio	60%
Alamo Heights Independent School Dist.	70%
North East Independent School Dist.	60%
Northside Independent School Dist.	70%
Judson Rural School Dist.	40%

This procedure relies very heavily upon the validity of the assessment rolls of these other jurisdictions. Nevertheless, it is an ingenious device and may prove to be a valid one. It is too early to state or even predict whether it will stand up when put to the test. Between 1,500 and 2,000 protests have been filed. In the case of protests involving substantial amounts, the county assessor is making individual appraisals in order to be in a stronger position when the protests come before the Board of Equalization.

Table 2 shows the stated ratios or percentages of full value and the base years used in assessing by Bexar County governments for which we have information at this time. Of course, these are the stated ratios ... the percentages which these assessors believe that they use ... the policy of the particular government. An independent check of property sales and assessments might show an altogether different level of assessing.

It is clear that some of our local governments do not assess at anything like the percentages they claim to use. Consequently, the figures furnished to us by officials and shown in Table 2 may not be altogether reliable.

Overlapping and Duplication

The overlapping and duplication of work in the present setup are enormous. In some sections of the county, three different governments make three separate assessments of the same piece of property and, of course, assess it on different

Table 2

STATED RATIO AND BASIS OF ASSESSMENT
IN BEXAR COUNTY GOVERNMENTS

Preliminary Tabulation - Incomplete

<u>Name of Local Government</u>	<u>Stated Ratio</u>		<u>Base Year</u>
<u>6 Countywide Units of Government</u>			
Bexar County	28%	of	current market value
Hospital District	28%	"	current market value
Junior College District	28%	"	current market value
S. A. River Authority	28%	"	current market value
Edwards Underground Water Dist.	28%	"	current market value
S. A. River Cons. & Recl. Dist.			
<u>16 Cities</u>			
San Antonio	60%	of	1953 value
Alamo Heights	50%	"	1941-42 market value
Balcones Heights	28%	"	current value
Castle Hills	50%	"	current value
China Grove			
Converse			
Hill Country Estates	100%	"	current value
Hollywood Park			
Kirby			
Leon Valley			
Live Oak			
Olmos Park	60%	"	1947 value
Shavano Park	40%	"	current value
Terrell Hills	60%	"	1947 value
Universal City	28%	"	current
Windcrest			
<u>8 Independent School Districts</u>			
San Antonio	60%	of	1953 value
Alamo Heights	40%	"	current value
North East	50%	"	current value
Northside	60%	"	current value
Edgewood			
Somerset			
Harlandale			
South San Antonio			

bases, by different methods, and for different amounts. Here for example are four Bexar County properties selected at random and the city, county, and school assessments on each property:

Description of Property	Current Assessment - Land and Buildings		
	By County	By City	By School Dist.
1. Ice & Food Store	\$ 7,086.00	\$ 11,810.00	\$ 7,950.00
2. Residence	3,900.00	6,500.00	5,920.00
3. Residence	3,606.00	6,010.00	5,400.00
4. Residence	19,355.00	27,650.00	27,650.00

Several governments have sought to reduce duplication and costs by contracting with overlapping units for assessment and collection service. This practice is commendable and should be extended where satisfactory service can be obtained at reasonable cost. But there is still an enormous amount of overlapping and waste and always will be as long as the present patchwork system of tax administration continues.

Administrative Expense

Bexar County governments are now spending in excess of \$1,000,000 a year for tax administration. The current county budget allots \$615,376 for this operation and the city budget allots \$419,135.

These figures are incomplete and, even if complete, would give only a rough approximation of the cost of tax assessment and collection.

In many instances, the office of tax assessor and tax collector is combined with other offices and work assignments. The county assessor is charged with the sale of automobile license plates and the registration of voters through collection of poll taxes.

In San Antonio, the city assessor operates the central collection agency of the city and is in effect, city treasurer. In Alamo Heights and some of the other suburbs the assessor-collector has half a dozen jobs and titles and may work at all of them in any given week. The exact cost of tax assessment and collection is not segregated in the accounts and thus cannot be ascertained.

This much is obvious: the present setup whereby a score or more of governments assess and collect property taxes in Bexar County produces endless confusion and public annoyance, duplication of work, and it wastes the taxpayers' money. This waste will inevitably increase as the present wasteful system grows. The major share of this waste falls upon city taxpayers who pay the entire cost of their own assessing and tax collecting system and on top of that, pay a big part of the cost of the county system much of which duplicates their own.

2. The Ultimate Goal

The remedy is obvious: consolidation of all assessing and tax collecting operations in a single tax department serving all of Bexar County and its local governments. The total amount of the countywide assessment roll which is applicable to the various local governments in the county would be certified to each of them by the consolidated department. These amounts would be used by them in setting their tax rates and levies which would then be certified to the consolidated department for collection. There would be periodic distribution of tax receipts to the local governments which levied the taxes.

The soundness of such an arrangement has long been recognized. Experts agree that there is no need ... and no sense ... in having more than one tax assessment of any property anywhere or more than one tax collection agency provided ... and this is extremely important ... that this single assessment and collection is made by a tax department which is (1) non-political, (2) efficient, (3) equipped with modern tools and scientific methods, and (4) generally worthy of public confidence.

Our goal then is not just consolidation. Any old system won't do. Our goal is consolidation of all existing systems in one good system ... a modern system which is as good as the best of the separate systems now operating and which will command the full confidence of the people of Bexar County and the local governments therein.

Specifications for the One Good System

By "one good system" we mean one that meets certain specifications. Here they are:

1. The consolidated office or department should be headed by an official who does not engage in politicking and who will stoutly resist political pressures and influences in the conduct of his department.

This specification calls for an assessor who is appointive, rather than elective. That is a "must".*

The National Association of Assessing Officials, which has in its membership many appointive assessors and many elected assessors, declares, "The elected assessor is subject to constant pressure to which only the strongest can offer complete resistance". Certainly, where the assessor has to engage in political activity to get and keep his job, the office tends to become more political than professional, and the assessor and his staff have little incentive to apply scientific techniques except in politicking. There have been many examples of this ... some close to home.

* This is not intended as a reflection on any assessor whose office is now elective because existing law requires it.

It is too early to decide the exact organization of the consolidated department or its relationships to other departments ... whether the same official will be assessor and tax collector or whether they will be separate officials working under a finance director or whether a treasurer will also be tax collector. And it is too early to decide the exact nature of the government to which the consolidated department will be attached. Specific recommendations on these points will come in our final report in 1963.

2. The head of the consolidated department should be a professional person of the highest integrity, technical competence, and administrative capacity.

The assessor should have had ... prior to appointment ... extensive practical experience in the field of assessment and tax administration and in the use of scientific assessment techniques. He must also have demonstrated outstanding ability as an administrator so that he can take over an organization, train it, work out the kinks, and make it into a working team with high morale and efficiency. That is a tough assignment but, unless he can master it, the job will "get" him.

A talent for public relations is also essential. It will be up to him to see that the people of Bexar County understand the objectives and procedures of his department and he must win their full confidence and moral support. Without that the consolidation will collapse in failure.

3. The consolidated department should be manned by a competent, rigorously trained staff with recruitment and all other personnel actions governed by a modern merit system.

"Merit system" is the name given to a businesslike system of personnel administration in government. It is used for recruiting, compensating, training, promoting, disciplining, separating, and retiring public employees on the basis of merit and fitness without regard to political affiliation and influence. This should not be confused with the so-called "merit rating plan" which is used in determining automobile insurance rates and in administering unemployment compensation. For a complete blueprint of a merit system and how it works, see our 1958 report on "A Merit System for Bexar County."

The merit system is the exact opposite of the spoils system ("to the victors belong the spoils") under which personnel actions are based on political connections and activity with little regard for merit or fitness. Any government which does not have a fully functioning merit system or firm plans for establishing one cannot be trusted with responsibility for operating a consolidated assessment and tax collection department.

4. Assessments should be made by the assessing staff ... not the property owner.

In backward assessment systems, the property owner "renders" his property and guesses what it may be worth. Very frequently he doesn't know and there may be almost as many standards of value as there are property owners. This is called the "silver offering" basis of assessment. It is not conducive to consistency or equity in assessing, particularly where the assessor tends to accept whatever figure is "rendered" ... i.e., guessed.

In a good assessing system, the assessor and his staff will have examined and measured every piece of property. They will have accumulated a great deal of information about it ... sometimes more than the property owner knows about it. And they will be able to make a fair assessment of the property without ever meeting the property owner or hearing from him.

5. Scientific assessing methods should be used so that equalization is built into the original assessment.

John Zangerle, one of America's greatest assessors once remarked, "No amount of equalization will make a bad assessment good". No assessment is perfect. There is always need for a board of equalization to hear appeals, correct inadvertent errors, review assessments in general, and make adjustments, but there will be relatively few such cases unless there is carelessness or incompetence in the original assessment ... or unless there is a drastic change in the basis of assessment.

The important thing is to build equalization into the original assessment by using a scientific assessment system. Such a system is used by good assessing departments all over the United States. In assessing land a good assessor uses a yardstick called a unit foot for measuring base values of residential and business lots. A unit foot is a front foot with standard depth (100 feet in most cities). Base values for rural and industrial land are generally computed in so many dollars per acre.

Base values (so many dollars per unit foot or per acre) are computed for every block of platted land and for unplatted areas. Determination of base values is no guessing process. It is most carefully done by assessing officials with the advice of the community's top experts on land values. Zoning provisions, deed restrictions, protective features, and other factors affecting values are carefully considered.

These base values are reviewed each year by means of a continuous analysis of property sales, leases, building changes, etc., and are revised where warranted. In a good system, the assessor is in constant touch with developments affecting property and is an expert on values.

Uniform rules and tables are established for computing the effect of varying lot depth. In most cities, 100 feet is the standard depth of lots. A 50-foot lot is generally considered to be worth 70% of a 100-foot lot. A lot with 125-foot depth may be valued at 120% of a 100-foot lot. The depth table shows a percentage for each depth from one foot to 150 feet. These percentages are applied uniformly to every lot on the tax rolls.

Corner influence tables are developed for business corners ... and in some cities for residential corners ... in order to reflect increased value due to corner location. Tables are also prepared for computing enhancement due to alley influence or for computing the values of through lots with frontage on two streets with different base values. Still other rules govern the assessment of odd-shaped lots and off-grade lots. These rules are applied uniformly and consistently to every property except where special circumstances warrant a modification of the regular procedures.

A yardstick ... either square foot or cubic foot ... is also adopted for measuring base values of buildings. A classification of buildings ... showing various types of residential, industrial, and commercial buildings ... is then developed with a picture and description of each type. Base values ... so many dollars per square or cubic feet ... are then worked out by assessing officials with the advice of men who have a practical working knowledge of local building costs. Large industrial and commercial properties are frequently appraised individually and in detail.

Factors are established for deviation from the standard types: so much extra for terrazzo floors, different types of roof, central heating, air conditioning, a sprinkler system, etc.

Tables showing standard allowances for physical depreciation are then adopted and applied uniformly to all properties on the tax roll except where special circumstances justify a departure from the customary procedure. Functional and economic depreciation (obsolescence) cannot be measured by a set rule or table, but a good assessor will take this factor into account.

Rules, tables, and other scientific methods are not a substitute for the assessor's judgment; they are an aid to the consistent exercise of that judgment. Where such methods are used, the taxpayer can audit his own assessment. He can examine his property card, see the actual computations used by the assessor in figuring his assessment, compare them with the computations on other properties, and satisfy himself that assessing is uniform and assessments are equitable.

6. Real estate sales, property income, and cost data should be taken into account, in computing value.

A modern assessing department uses three methods in computing property values: (1) recent real estate selling prices, (2) income of properties, and (3) construction cost of buildings less depreciation. Assessors seldom use all three of these methods on a single parcel of property, but all are employed in a good program.

7. The public should be fully informed regarding the system and the way it operates.

This can best be done by publishing a clear explanation of the procedure in pamphlet form for distribution to property owners, showing how the system works and inviting each property owner to check his own assessment and compare it with other assessments. Land value maps showing base values and typical buildings with unit values and assessment computations can also be made available to the public. A resourceful assessor will use the full resources of press, radio, and television to build public confidence in his department and its procedures.

8. The Tax Department must have proper tools and equipment ... and adequate appropriations.

Proper tools include tax maps, block and lot maps, and property record cards. Modern electronic equipment is needed to permit mechanical writing of tax bills and rolls and updating of office records.

An alert assessor will be constantly checking building permits, deed abstracts, zoning changes, and fire reports so as to keep his records posted and up to date. And he will have a pipeline to local realtors, bankers, and builders so as to be fully informed on current and coming trends affecting property values.

Finally, the department must have enough money to support a full program and it must pay sufficient salaries to get and hold top talent. Such talent will be scarce during the next decade. Blind budget slashing on a revenue producing department is not economy.

9. The consolidated department should make a continuous reassessment of all taxable property.

A complete and uniform reassessment of all taxable property in the county should take place at the time the department is established ... or even before that as was done in Dade County, Florida, as described below. Thereafter, the assessor should keep this up to date by continuous reassessment. This is generally done by dividing the total area into four, five or six sections and reappraising one section each year so that the entire area is reappraised during a period of four or five or six years.

10. A consolidated system and the government to which it is attached should have a modern, efficient accounting system which will account for each local government's share of total tax collections at all times.

Without strict accounting control, it is always possible for money which belongs to one government to be diverted into other hands and used for other purposes. Good accounting provides strict, built in controls which keep track of

each government's share of the total tax take just as a bank knows who owns every dollar in its custody at any given moment.

For over thirty years now, Cook County, Illinois, has had such a system. The taxpayer's dollar is split into its components at the instant of collection. If he pays at the office, it is rung up on the cash register. A flag flies up before his eyes to show how much of his payment is for the county, how much for the state, how much for the forest preserve district, how much for the drainage district ... and all the other governmental units in the county.

The tapes from these cash registers go to the comptroller at the close of the day along with the money for auditing. Thus, from the moment the taxpayer hands over the money, it is properly divided and there can be no diversion or misapplication of funds. Without such control, it is extremely doubtful if Bexar County local governments could be persuaded to let a consolidated department system collect and hold their tax money.

The accounting system and related procedures in the consolidated tax department should be integrated with the accounting procedures of all other departments of the government to which it is attached ... and vice versa. An interesting example of this is reported by the Municipal Finance Officers Association:

Santa Clara County, Calif. has received delivery of IBM 1401 equipment consisting of eight units including magnetic tape drives. The new equipment is being installed in the county's new administration building and at the same time three card equipment installations are being consolidated into a central data processing center under the direction of the County Comptroller.

Work is already under way to convert cards to magnetic tape as an initial step in preparing the 1961-62 tax assessment roll. These tapes will be used to prepare the property tax bills, do the tax accounting, apportion tax collections, calculate delinquent tax penalties and prepare delinquent tax lists. Payroll, appropriation accounting, and accounts payable accounting will be done on the new equipment beginning in May, 1961.

The central data processing division services 12 county government departments, all the county school districts and the county flood control districts. *

The sort of accounting system here recommended would, of course, include a rigorous independent audit each year and this audit would include a system check to make sure there are no bugs or leaks in the system.

* From Municipal Finance Newsletter, May 1, 1961

3. The Available Alternatives ... and Obstacles

We have said that our ultimate goal here in Bexar County should be to secure one good system for assessing and collecting all property taxes for all local governments in the county.

But we cannot achieve this goal with a stroke of the pen. We cannot just pass a resolution or a law. Between what we have now and what we know we ought to have there are many legal and administrative difficulties to be resolved, many fears and suspicions to be overcome and ... most important of all ... many years of hard work.

This will be quickly evident if we will ask ourselves this extremely practical question: how are we going to bring about a workable consolidation of tax assessment and collection in Bexar County? How?

There are at least six possible ways of going about it. They are:

1. Mandatory consolidation of all assessing and tax collection units in the Office of County Tax Assessor-Collector as now constituted.
2. Optional consolidation in the Office of County Tax Assessor-Collector as now constituted.
3. Mandatory consolidation of all such units in the City of San Antonio's Office of Assessor-Collector.
4. Optional consolidation in the City of San Antonio's Office of Assessor-Collector.
5. Mandatory consolidation of all such units in (a) a vastly reorganized county government or (b) some new type of metropolitan government.
6. Optional consolidation of all such units in (a) a vastly reorganized county government or (b) some new type of metropolitan government.

1. Mandatory Consolidation with County as Is

Mandatory consolidation of all tax assessing and collection in the Office of County Tax Assessor as now constituted is the first alternative. We do not recommend it. The county government as now constituted is not suitable for operating the one good system.

The Office of Assessor-Collector is elective. That procedure is written into the State Constitution * and is not likely to be changed until a workable County Home Rule Amendment is voted and a home rule charter adopted by the voters of Bexar County. The Office of Assessor-Collector has long been famous as a citadel of political strength rather than a unit of efficiency and effectiveness. In fact, it has lacked basic tools and techniques for doing a good assessing job and has been the target of constant criticism.

A resolute attempt is currently being made by the new County Assessor to reorganize the office, install at least some modern equipment, add omitted property to the tax rolls, and bring about some semblance of equalization in assessing. And he is really striving toward that objective; of that there can be no doubt. However, it is much too early to form a judgment on the effectiveness of the new order of things or on its chances for survival.

The county has no merit system and there is little likelihood of one being adopted in the near future. We have previously stated that "any government which does not have a fully functioning merit system or firm plans for establishing one cannot be trusted with responsibility for operating a consolidated assessment and tax collection department" (page 10).

Up to this point, we have been talking about assessment. There is an additional obstacle in the collection process. Previous reports of the Research and Planning Council have stated on many occasions that the county's present accounting system is antiquated and unreliable. One of the top financial houses in the nation says:

"Bexar County ... was for many years among the local units on which we reported annually, but we finally gave up the job of trying to fit the bits and pieces together from the county's utterly inadequate financial reporting."

For several years now the Research and Planning Council has been recommending installation of a modern county accounting system. This recommendation was also made by Ernst and Ernst in their 1960 audit.

* There shall be elected by the qualified electors of each county at the same time and under the same law regulating the election of State and County officers, an Assessor and Collector of Taxes, who shall hold his office, for two (2) years and until his successor is elected and qualified; and such Assessor and Collector of Taxes shall perform all the duties with respect to assessing property for the purpose of taxation and of collecting taxes as may be prescribed by the Legislature. (Texas State Constitution, Sec. 14, Art. 8, adopted November 8, 1932.)

No action of consequence has yet been taken to correct this condition. Until there has been a complete and drastic improvement in this situation, we can hardly expect cities and school districts of the county to put their trust in a consolidated collection system, for these governments would never know whether their tax money was being kept straight or mixed up.

It is therefore our considered judgment that Alternative No. 1 ... consolidation of all assessing and tax collecting in Bexar County in the Office of County Tax Assessor-Collector as now constituted ... would be undesirable and perhaps dangerous, and in saying this we intend no reflection on the County Assessor-Collector or any disparagement of his efforts to improve the existing procedures.

Before leaving this alternative let us consider still other obstacles ... not previously mentioned ... which affect this and some of the other alternatives.

Almost any type of tax consolidation here in Bexar County, runs into complications stemming from the existing diversity in assessment levels or ratios. If the consolidated assessment were made at a very low percentage of estimated true value, such as is used by many counties throughout the state, at least some of our municipalities, school districts, and other local governments would be unable to live on such a low assessment without greatly increasing their tax rates which some of them might be legally unable to do. If, on the other hand, the consolidated assessment were made at a higher percentage of true value ... as high as that now used by cities, school districts, and other units, all taxpayers in the county would have to pay higher state taxes than they now pay, because the state ad valorem tax is levied on the county assessment. At the same time, property owners who now pay county taxes and other taxes based on a relatively low county assessment would fear that there would be a substantial hike in their county wide taxes. Such fears might perhaps be quieted by legislative requirement that the present countywide tax rates be not increased for a stated period.

Another obstacle arises from the fact that, if the consolidated assessment were substantially larger than the present county assessment, all school districts in the county would have a sharp reduction in their state aid which is distributed according to a formula. Under this formula, the smaller the county assessment roll, the greater the amount of state aid and vice versa.

The obvious remedy is to (1) abolish the state ad valorem tax and (2) eliminate county assessments as a factor in apportioning state aid to school districts. The major reason for competitive underassessment which exists among Texas counties is that each county is trying to minimize its share of the state ad valorem tax and maximize its share of state school aid.

However, that is easier said than done. In the case of the state ad valorem tax, there are legal complications which are discussed in the Preliminary Report of the Texas Commission on State and Local Tax Policy. The report states that thorough study of all aspects will be necessary before the commission is ready to offer a recommendation.

2. Optional Consolidation With County

Under the second alternative, the county as now constituted would assess and collect taxes under contract for any and all local governments which desire this service. Two cities ... Balcones Heights and Universal City have such contracts with the county at present. Both are small municipalities with small budgets, so they are able to live on the limited revenue produced by the county's low assessment level.

Such optional consolidation would have some of the same risks as the first alternative except that (1) any government which finds the plan unsatisfactory could escape from it at the end of any contract period and (2) each government could stipulate the ratio or percentage of true value which it wishes to have used in its assessment roll and tax bills. The latter option could not be offered under a mandatory, area wide system.

3. Mandatory Consolidation With City

The third alternative would be to require all local governments in the county ... including the present Office of County Tax Assessor-Collector and the county's Equalization Department ... to let San Antonio's Assessor-Collector assess and collect their taxes.

The City of San Antonio has a modern assessment and collection system which would justify the confidence of the other local governments of the county. But the city assesses at a higher ratio of estimated true value than does the county. If its ratio or level of assessing were applied to the county, our share of the state ad valorem tax would increase and our share of state school aid would diminish.

It would also be necessary to provide some protection to property owners who now pay county taxes and other taxes based on the county's admittedly low valuations. Perhaps this could be done by legislation arbitrarily reducing all such rates for a year or two until the new system was stabilized. Thereafter, officials could increase the rate but would have to justify such action.

4. Optional Consolidation With City

Since the city is in a position to furnish assessment and tax collection service to suburban municipalities and school districts, we suggest that the City Assessor offer this service to these other governments. Some of them might wish to contract with the city for assessing service, collection service, or both. They could specify the percentage of true value to be used in preparing their assessment rolls and tax bills.

5. Mandatory Consolidation With Reorganized County, etc.

The fifth alternative calls for mandatory consolidation of all local government assessment and tax collection in Bexar County in a vastly reorganized county

government or in some new type of metropolitan government.

By "vastly reorganized county government" we mean one which has (1) an overall governing body which is accountable to the voters of Bexar County for the efficient and economical conduct of the entire county government, (2) a chief administrator, (3) a merit system, (4) a modern budget system, (5) a reliable accounting system, and (6) modern operating methods and a general atmosphere of efficiency. None of these things are present at the Court House now and they are not likely to develop there until we have County Home Rule and a complete reorganization of the county government under a modern, home rule charter.

The other alternative is to establish some new type of metropolitan government which is capable of doing a consolidated assessment and tax collection job and which has sufficient public confidence that Bexar County taxpayers and the officials of local governments in the county will be willing to entrust the job to it.

Various possibilities will be studied during our three year Survey of Metropolitan Government; such as (1) annexation, (2) city-county consolidation, (3) city-county separation, (4) functional consolidation, (5) interlocking city-county government, (6) city-county federation, (7) abolition of county government and (8) a regional or metropolitan council consisting of local government officials of the county. All of these possibilities will be explored during our survey. Specific findings and recommendations will appear in our final report which is due on or before July 1, 1963.

This preliminary report will seem somewhat vague to the reader at this point. It has to be so because it is submitted at a time when our survey is only 30% complete. We cannot make final recommendations as to the organization location of this one function until we know what our recommendations are going to be regarding a plan of government for this metropolitan area. Assessment and collection operations and all other operations will be fitted into that overall plan when the time comes.

One interesting example of a consolidated assessment and collection department has been established in the new metropolitan government in Dade County Florida which has been built around a reorganized county government with a general governing body consisting of thirteen county commissioners, a county manager, and provision for transfer of certain functions of areawide concern to that county government and optional transfer of certain other functions at a later date.

One of the functions transferred at once was that of assessment and collection of taxes. The home rule charter adopted by Dade County voters in 1957 provides as follows:

Section 4.04 Assessment and Collection of Taxes

A. Beginning with the tax year 1961, the county tax rolls prepared by the county shall be the only legal tax rolls in this county for the assessment and col-

lection of county and municipal taxes. Thereafter no municipality shall have an assessor or prepare an ad valorem tax roll. Each municipality shall continue to have the right to adopt its own budget, fix its own mileage, and levy its own taxes. Each municipality shall certify its levies to the county manager not later than 30 days after the county tax rolls have been finally approved by the Board. Any municipality may obtain a copy of this tax roll upon payment of the cost of preparing such a copy, and copies of the tax rolls shall be available for public inspection at reasonable times. Maps showing the assessed valuation of each parcel of property may be prepared and made available for sale to the public at a reasonable price.

B. All county and municipal taxes for the tax year beginning January 1, 1961, and all subsequent tax years, shall be collected by the county on one bill prepared and sent out by the county. The amounts of county and municipal taxes shall be shown as separate items, and may be paid separately.

C. Delinquent municipal taxes shall be collected in the same manner as delinquent county taxes.

D. All the tax revenues collected for any municipality shall be returned monthly by the county to the municipality.

Section 9.03 Reassessment

A. On or before May 1, 1958, the Board of County Commissioners shall provide for the reassessment according to law of all real and tangible personal property within the incorporated and unincorporated areas of the county exclusive of property assessed by the state. The cost of this reassessment shall be paid out of the general funds of the county or any other funds that might be available. This reassessment shall be completed as expeditiously as possible but in no event later than January 1, 1961.

B. After this reassessment has been completed and made official by the Board, county tax rolls reflecting this reassessment shall be completed and promptly made available to each municipality. Beginning with the 1961 tax year, no other real and tangible personal property tax rolls than those prepared by the county shall be legal or in any manner used for the assessment of taxes within the incorporated and unincorporated areas, except as provided in 9.03D.

C. Prior to January 1, 1961, each municipality shall conform its fiscal year to that of the county, and to accomplish this may levy taxes for less or more than one year but for not more than two years at once.

D. Upon petition from any municipality on grounds of hardship caused by use of the county tax rolls or prescribed fiscal year, the Board may from year to year grant that municipality an exemption, but no such exemption shall extend beyond January 1, 1966.

One very important fact should be stressed here. The new charter abolished the elective office of county assessor of taxes but empowered the county manager to provide for the continuation of all the duties and functions of the office which he did by creating a new position of county assessor and appointing the same assessor who had been elected to that office a few years before the charter was adopted.

We plan to make an on the spot check of this Dade County situation later this year and will prepare a special report on our findings.

6. Optional consolidation with reorganized county etc.

Still another possibility is that of optional consolidation with a vastly reorganized county ... or some new metropolitan type of government. Under such a system, the various local governments in the county would have the option of contracting with the county or metropolitan government for assessing and tax collecting service. If, at that time, the different governments had different ratios or levels of assessment, each could specify the percentage of true value to be used in the assessment roll and in bills for taxes of that particular taxing body.

A very interesting and very successful example of that exists in Los Angeles County, California. It dates back to the early years of this century.

Los Angeles County is highly urbanized. It has a modern county government and has had a county administrative officer (modified county manager) since 1938. It has a long record of efficient administration. Los Angeles County furnishes 41 different services to its 71 municipalities through contracts or service agreements of which 1,100 are in effect at the present time. One city (Lakewood) contracts with the county for practically all of its operating services.

One of the most popular contract services is assessment and tax collection. All except two cities ... Long Beach and Pasadena ... contract with the county for this service. In those two cities, the question of contracting with the county was placed on the ballot but rejected by the voters. Consequently in Long Beach and Pasadena, property is assessed twice ... by the city and the county. Elsewhere, a single assessment is made by the county.

These contracts with the county for assessment and tax collection run for five years. The county charges each municipality 1% of the first \$25,000 collected and 1 1/4% for all money collected over that. County officials tell us that that does not cover the cost of the service but state law sets this fee. The county is required by law to do the assessing and collecting for all school districts in the county and to render this service free.

In California, the county assessor is elected but the tax collector, who is also treasurer, is appointed. Although elective, the office of assessor has been an extremely stable one. The present assessor has been in office since the late 30's and is highly regarded. His staff is under the regular county merit system.

This contracting system is extremely popular in California, so much so that an organization called the California Contract Cities Association was formed in 1958. It conducts an annual seminar. Such contracts are administered in Los Angeles County by the County-City Services Division which operates under the Chief Administrative Officer of the county.

4. The Ultimate Saving

Consolidation of tax assessment and collection in a large metropolitan area is more practical and will save more money than almost any other type of consolidation, due to the nature of the operation. It is obviously more economical to have one assessor make one assessment than to send three assessors to assess the same property three times ... even if two of them copy the third man's figures. And one office can prepare and mail one tax bill cheaper than three offices can do with three separate bills.

As we have pointed out in this report, tax consolidation is not now feasible in Bexar County due to certain obstacles and it is not likely to take place for five or ten years. We cannot now predict what the saving will be at that time.

If we could wave a magic wand, cause the obstacles to disappear, and put tax consolidation into effect this year with one good system, we might save \$100,000 or \$200,000 a year, but the saving might be nil the first year or two, if we had to install expensive equipment and a complete new system and employ a greater number of competent assessment technicians.

However, in subsequent years, the savings ... the difference between a consolidated operation and the cost as it would be under a growing host of separate systems ... should run into big money. The long range or ultimate saving is the important thing. It is to that goal that our Survey of Metropolitan Government is directed.

5. The Road Ahead

In this preliminary report we have described the present organization for tax assessment and collection in Bexar County and have said that it produces endless confusion and annoyance, duplication of work, and waste of the taxpayers' money.

We have stressed the ultimate goal; namely, one good system to do the assessment and tax collection job for all local governments in the county. We have outlined the specifications of this one good system and we have said that no consolidation should be attempted unless it meets those specifications. Finally, we have analyzed six alternatives for bringing about consolidation and the obstacles which lie in the path of any consolidation under present circumstances.

It all adds up to this; namely, that the only satisfactory and workable consolidation here in Bexar County will be one ... either mandatory or optional ... which is operated under a vastly reorganized county government or some new type of metropolitan government serving the entire metropolitan area. Our recommendations on that point will be presented in our final report which is due on or before July 1, 1963.

Meanwhile there is much to be done and we should start doing it at once. The very first step ... without which all other steps will be futile ... is to bring about a widespread understanding of this whole tax problem by the people of Bexar County. This is a large order and must be undertaken on a large scale and it will take a long time. The blueprints for our Survey of Metropolitan Government call for creation of a body ideally suited for this task: a broad based Metropolitan Area Study Committee including officials and citizens and representatives of various areas, interests, and points of view in the county and various social, racial, and economic groups.

No definite date has been set for establishing this committee. However, whenever it is established, it should start work by studying this preliminary report and others in this series.* It can also explore the obstacles here discussed and can consider fully the many objections which will be raised to a consolidated system ... or any other change in the existing order of things. Of course, no one can predict the outcome but we would hope that out of all this would come general agreement that a consolidated system of tax assessment and collection should be adopted and that all obstacles which now stand in the way of that ultimate goal can and must be resolved.

The Research and Planning Council has applied to the Ford Foundation for a grant of \$30,000 to finance the work of the Metropolitan Area Study Committee and whatever services it may request us to render. That application is still pending.

Relation to the State Survey

This whole question of tax administration in Texas is currently the subject of a three year study by the Texas Commission on State and Local Tax Policy. This Commission was created by the 1959 Legislature and directed to make

* Other preliminary reports in this series scheduled for completion in 1961 are:

1. The Bexar County Hospital District (issued March 15, 1961)
3. Fire Protection in Bexar County
4. Purchasing Practices of Bexar County Governments
5. Planning and Zoning in Bexar County
6. Water Districts of Bexar County

"comprehensive studies of property taxation and its administration by political subdivisions and by the State Government". The commission is also directed to recommend any changes which may be needed in the basic state law regarding property taxation and steps necessary or desirable by which to insure more equitable and effective property tax administration.

A preliminary report was submitted to the 1961 Legislature in January. The Commission's final report is scheduled to be submitted to the 1963 Legislature and will undoubtedly be the subject of extensive public discussion throughout the entire state. The Texas Research League is serving as staff agency to the commission.

We recommend that the Metropolitan Area Study Committee and all other persons and organizations in Bexar County coordinate their efforts in this field with those of this state commission. There should be extensive exchange of views, questions, findings, and recommendations.

Relation to Our Survey of Metropolitan Government

Our study of tax administration in Bexar County must also be closely related to our studies of other governmental functions, for this is just one section of our Survey of Metropolitan Government. Paul Ylvisaker of the Ford Foundation has defined the initial goal of metropolitan surveys and surveyors as follows: "to make the urban community fully conscious of itself over its whole area and over the full range of its problems."

We have a long journey ahead of us before we even come close to that goal. The sooner we start, the sooner we shall arrive.