

T0: Personnel Board

FROM: Sarah Olson, Human Resources

SUBJECT: Real Estate Agent 2, PCED-Economic Development

DATE: November 2, 2016

At the request of the Economic Development Division Director Matt Mikolajewski, a study was conducted of a Real Estate Agent 2 position (Compensation Group 18, Range 08), held by Jennifer Frese (position #3611). This position works on advanced level real estate projects and transactions beyond the scope of the current classification and includes complex projects requiring specialized knowledge and experience. After reviewing the duties and responsibilities associated with this position, as seen in the attached position description, and meeting with Mr. Mikolajewski and the incumbent, I conclude that the position should be recreated as a Real Estate Agent 3 position (Compensation Group 18, Range 10), and that the incumbent should be reallocated to the new position.

The class specification for Real Estate Agent 3 indicates employees perform

...specialized professional real estate work encompassing one or more of the following areas: appraisal, acquisition, sales, leasing or real property management. The work at this level is characterized by independent responsibility for complex projects requiring specialized knowledge and experience. Work is performed under the general supervision of the Real Estate Supervisor and/or the oversight of a higher level Real Estate Agent.

Distinguishing duties and responsibilities include

Perform all the work of the Real Estate Agent 2 with a greater degree of knowledge, independence, and expertise.

Review complex fee appraisals required for projects managed by other agents. Establish offering prices and prepare written analysis. Define appraisal issues, determine qualified bidders and help develop Requests for Proposals for external appraisal services.

Direct and negotiate varied real estate acquisitions, sales, contracts, leases, agreements, exchanges, and legal land divisions with private sector companies and developers, public agencies, and other governmental units. Draft and execute or oversee the execution of related agreements, contracts, and documents to close acquisitions and facilitate land divisions or lot consolidations.

Perform and/or coordinate varied and complex professional activities and projects in support of real estate programs and services. Staff and facilitate designated committees efforts, as assigned. Advise other departments on acquisition, disposition, lease, encroachment, land division, title review, valuation, and easement activities. Respond to inter/intra-governmental requests for information and consult or contract for service providers (title companies, surveyors, appraisers, engineers, etc.).

Draft letters of intent, purchase and sale agreements, leases, encroachment agreements, easements, contracts, and other documents related to real estate transactions.

Provide assistance to the public in obtaining government approvals and permits for City projects.

Make presentations to groups, such as committees, boards, commissions and other public groups, as necessary.

The Office of Real Estate Services Manager (vacant) oversees the Real Estate Agents, with day to day leadership and supervision provided by the Real Estate Agent 4-Jerome Lund. There is one Real Estate Agent 4, two Real Estate Agent 3's, two Real Estate Agent 2's and one Real Estate Agent 1.

Jennifer Frese started with the City in 2011 as a Real Estate Agent 2. Ms. Frese duties and responsibilities have increased and evolved since then to include multiple acquisition projects, including relocation services for displaced owners or tenants; Certified Survey Map and Plat review; disposal and sales of surplus City-owned property; creation and/or release of easement rights; leasing agreements; encroachment agreements; and drafting authorizing resolutions to the City's common council.

A large portion of the incumbent's position description includes acquisition and disposal of real estate and providing relocation assistance. Ms. Frese now acquires land for economic development property and not just for eminent domain. Duties may include selling City owned property to developers, conducting closings and relocating families/businesses due to City projects and/or City needs. City needs requiring relocation may be an expansion of a City department building such as the new Water Utility Operations facility on N. Sherman Avenue that required demolishing two homes in order to create enough space for the building. In doing so, Ms. Frese was tasked with helping the displaced find homes. This involves a thorough understanding of narrative appraisals completed for eminent domain purposes and the ability to effectively work with people going through the relocation process. The relocation process is complicated and involves specified knowledge of Adm. Chap. 92 and Eminent Domain Chap 32. Relocation requires using tact and conducting multiple meetings to make sure everyone understands their rights and payment eligibility throughout the process. Under state law, there are legal guidelines to follow when the City acquires land. This includes getting an appraisal for the negotiation of an agreed upon compensation, or assisting with the eminent domain process in the event the City acquires the property through condemnation, (issue of award, contacting owners, hearings, notices, and going before a judge). These duties are consistent with the description on the class specification that indicates the Real Estate Agent 3 will direct and negotiate varied real estate acquisitions, draft and execute or oversee the execution of related agreements, contracts, and documents to close acquisitions within specific deadlines.

Another large portion of her position description concerns valuation and title work. This includes the negotiation and administration of leases and encroachment agreements and the preparation of fair market value reports. Ms. Frese is a main contact for other City agencies looking for land value figures. This is in line with the work in the class specification that describes negotiation of varied real estate leases and exchanges and responding to inter/intra-governmental requests for information.

Ms. Frese exercises considerable independent judgment and discretion with her assigned areas and holds her appraisers license, is an active member of the WI chapter of International Right of Way Association (IRWA), and is a Senior Right of Way Agent (SR/WA), all of which give her

specialized knowledge expected at the Real Estate Agent 3 classification. The work Ms. Frese performs is in line with what is expected of the Real Estate Agent 3 classification. Because of this, I recommend the Real Estate Agent 2 position, occupied by Ms. Frese, be recreated as a Real Estate Agent 3 position and the incumbent be reallocated to the new position.

We have prepared the necessary Resolution to implement this recommendation

Editor's Note:

Compensation Group/Range	2016 Annual Minimum (Step 1)	2016 Annual Maximum (Step 5)	2016 Annual Maximum +12% longevity
18/08	\$58,762	\$69,731	\$78,099
18/10	\$63,787	\$76,660	\$85,859

cc: Matt Mikolajewski —Economic Development Division Director
 Natalie Erdman—Director of Planning, Community & Economic Development
 Mike Lipski—HR Services Manager