

CITY OF MADISON
INTER-DEPARTMENTAL
CORRESPONDENCE

DATE: October 31, 2007

TO: Personnel Board

FROM: Larry Oaks, Human Resources

SUBJECT: **City Assessor's Office Reorganization**

The City Assessor has determined that the needs of the organization would be best served through staff reorganization. The current structure (organizational chart attached) is retained essentially as it existed as an element of the former Department of Revenue.

In this format, the "Chief Assessor" position (#727), occupied by M. Kurth, in Compensation Group 18, Range 15, directs the Residential and Commercial property appraisal programs, and provides high-level professional expertise in associated litigation. This structure places considerable demands on the "Chief Assessor" and does not always provide the opportunity for adequate supervision of subordinate programs/staff. In this context, the City Assessor has determined that the needs of the organization would be better served through the introduction of an additional supervisory position. The proposed structure would provide for a supervisor of Residential Valuation and a supervisor of Commercial Valuation (see proposed organizational chart). Although closely related supervision of these roles is neither interchangeable nor are they equivalent in terms of the inherent responsibilities.

Accordingly, I recommend the creation of two new classifications: "Assistant City Assessor - Residential" and "Assistant City Assessor - Commercial" (class specifications attached).

I recommend that the new class of "Assistant City Assessor - Residential" be established in Compensation Group 18, Range 12. This placement provides adequate compensation relative to subordinate staff and equates the position with comparable managers.

I recommend that the new class of "Assistant City Assessor - Commercial" be established in Compensation Group 18, Range 13. This placement reflects the fact that this position is incrementally more challenging (in terms of technical considerations, complexity and frequency of related litigation, etc.) relative to the "Assistant City Assessor - Residential" (18/12) as referenced above.

This new structure will be implemented through the downgrading (and red circling) of the incumbent "Chief Assessor" to the position of "Assistant City Assessor - Commercial"—a position for which he is imminently qualified; and the new position of "Assistant City Assessor - Residential" will be created in the agency's 2008 Operating Budget.

It is also timely to address the classification of the position (#809) of "Revenue Administrative Coordinator" (occupied by S. Sweeney) in Compensation Group 18, Range 04. In brief, this position is responsible for supervising the administrative and technical activities and services of the Assessor's Office including the assessment roll, related maps and records, etc. As initially conceived, this work was performed under the supervision of the "Revenue Operations Manager" (18/12), who played a very direct role in the oversight of those services. When the "Revenue Operations Manager" was deleted several years

ago (with the dissolution of the Revenue Department), this position incrementally absorbed the full responsibility for the oversight of those staff/services. In a sense, this position transitioned from being the “assistant supervisor” to being the supervisor. In examining this current role, it very closely conforms to the previous class/position of “Assessment Services Supervisor” in Compensation Group 18/08—which was deleted when the “Revenue Operations Manager” assumed this role (in addition to other department-wide responsibilities).

I recommend that this position be classified as an “Assessment Services Supervisor” (as re-established) in Compensation Group 18, Range 08. Further, I recommend that the incumbent be reallocated to that level. Although an unusual transition, clearly this employee has been functioning at a higher level for some time.

I have prepared the necessary ordinance and resolution to implement these recommendations.

Attachments

cc: Mark Hanson, City Assessor

Compensation Group/Range	2007 Annual Minimum (Step 1)	2007 Annual Maximum (Step 5)	2007 Annual Maximum (w/Longevity)
18/15	67,395	81,146	90,896
18/13	61,418	73,384	82,758
18/12	58,509	70,637	79,118
18/08	49,306	58,509	65,520
18/04	42,756	49,306	55,224

ASSISTANT CITY ASSESSOR - COMMERCIAL

CLASS DESCRIPTION

General Responsibilities:

This is responsible professional and managerial work in developing and implementing the City's commercial property appraisal and assessment program. The employee is responsible for planning, directing and evaluating the work of property appraisal staff and administering the ongoing appraisal and assessment of all commercial, agricultural and personal property throughout the City. Work involves considerable judgment and discretion in meeting program objectives. The employee works under the general supervision of the City Assessor, who reviews the work upon completion for conformance with objectives and/or policy-level determinations.

Examples of Duties and Responsibilities:

Plan, direct and evaluate the work of property appraisal staff, and administer ongoing programmatic responsibilities for commercial and personal property valuations on a citywide basis. Hire, train, supervise, evaluate and discipline appraisal staff (or effectively recommend such action).

Determine the need for and direct assessment maintenance efforts to reflect property improvements, demolitions, damages, changes in land use or other pertinent valuation factors. Organize and oversee related economic research and data collection to determine valuation trends and methodologies. Annually complete a stratified commercial sales analysis to use when reviewing the Wisconsin Department of Revenue's commercial sales analysis and make recommendations.

Develop and recommend to the City Assessor policies and operating practices relative to the valuation program. Implement and/or interpret all related standards. Explain appraisal and assessment policies and procedures to property owners, developers, department/division personnel and elected officials.

Direct the preparation and presentation of cases presented to the Board of Assessors, Board of Review, Circuit Court, Appellate Court, Supreme Court and the Wisconsin Department of Revenue. Testify as an expert witness as required. Serve as a member of the Board of Assessors.

Act in the capacity of the City Assessor at Board of Review hearings. Prepare and complete the questioning of witnesses at the Board of Review. Work directly with the City Attorney in the preparation and presentation of all court cases.

Provide consultation and direction to subordinates on the more complex assessment functions. Personally perform the most difficult and judgmental appraisals. Maintain an awareness of property tax exemption statutes and case law. Advise the City Assessor on exemption requests. Monitor the status of exemptions and make recommendations as

appropriate. Direct the preparation and presentation of court cases involving exemption disputes. Serve as an expert witness for exemption disputes. Periodically review existing exemptions to verify exempt status. Review legislation related to property tax and exemption issues. Work with WAAO and other organizations to appear before legislative committees testifying on property tax and exemption issues.

Participate in the overall management of the City Assessor's Office. Analyze workload and recommend preliminary budgets. Prepare and/or review various reports and studies relative to office operations. Represent the City Assessor in various meetings with the general public, taxpayer associations, real estate groups, business groups, neighborhood groups, etc. Provide for the continuity of office operations during the absence of the City Assessor by carrying out supervisory and administrative functions as assigned.

Perform related work as assigned.

QUALIFICATIONS

Knowledges, Skills and Abilities:

Considerable knowledge of relevant property appraisal and assessment principles, practices and techniques and relevant tax laws and rules. Working knowledge of effective managerial and supervisory practices and principles. Working knowledge of standard computer software and its application to business decisions. Ability to develop and implement effective valuation and assessment techniques and practices. Ability to plan, direct, prioritize and evaluate the work of property appraisal staff and to administer the ongoing appraisal and assessment of City-wide commercial, agricultural and personal property. Ability to organize, oversee and conduct related economic research and data collection to determine valuation trends and methodologies. Ability to conduct and/or review the most complex commercial property appraisals. Ability to effectively supervise and train Appraisers. Ability to communicate effectively, both orally and in writing. Ability to analyze complex valuation problems and recommend logical and practical solutions. Ability to develop and maintain effective working relationships. Ability to maintain adequate attendance.

Training and Experience:

Two years of directly related experience in commercial property appraisal and assessment experience comparable to that gained as a Property Appraiser 4 with the City of Madison, which included or was supplemented by considerable staff leadership and program administrative responsibilities. Such experience would normally be gained after graduation from an accredited college or university with a Bachelor's Degree in Real Estate, Business Administration or a closely related field. Other combinations of training and/or experience which can be demonstrated to result in the possession of the knowledges, skills and abilities necessary to perform the duties of this position will also be considered.

Necessary Special Qualifications:

Possession of a valid driver's license or the ability to otherwise meet the transportation requirements of the position. Certification by the State of Wisconsin as an Assessor 2 and 3, prior to appointment.

Department/Division	Comp. Group	Range
Office of the City Assessor	18	13

Approved: _____ Date

Brad Wirtz
Human Resources Director

ASSISTANT CITY ASSESSOR - RESIDENTIAL

CLASS DESCRIPTION

General Responsibilities:

This is responsible professional and managerial work in implementing the City's residential property appraisal and assessment program within the Office of the City Assessor. The employee is responsible for planning, directing and evaluating the work of property appraisal staff and administering the ongoing appraisal and assessment of residential property and assisting the assessment of agricultural property throughout the City. Work involves responsibility for participation in long-term program planning and policy development. The employee works under the general supervision of the City Assessor who reviews the work upon completion for conformance with objectives and/or policy-level determinations.

Examples of Duties and Responsibilities:

Plan, direct and evaluate the work of property appraisal staff and administer the ongoing residential assessment program responsibilities. Hire, train, supervise, evaluate and discipline appraisal staff (or effectively recommend such action).

Determine the need for and direct assessment maintenance efforts to reflect property improvements, demolitions, damages, changes in land use, or other pertinent valuation factors. Organize and oversee related economic research and data collection to determine valuation trends and methodologies. Explain appraisal and assessment policies and procedures to property owners.

Direct the preparation and presentation of cases presented to the Board of Assessors, Board of Review, Circuit Court and the Wisconsin Department of Revenue as assigned. Testify as an expert witness as required. Serve as a member of the Board of Assessors.

Participate in the overall management of the Office of the City Assessor. As a member of the department's management team, prepare and/or review various reports and studies relative to office operations; assist in planning, organizing and supervising operations within the department. Develop and recommend to the City Assessor standards and controls to measure the degree of operational effectiveness, analyze workload and recommend preliminary budgets, review various functions on an ongoing basis to verify effectiveness and economy.

Represent the City Assessor in various meetings with the general public, taxpayer associations, real estate groups, business groups, neighborhood groups, etc.

Perform related work as assigned.

QUALIFICATIONS

Knowledges, Skills and Abilities:

Thorough knowledge of relevant property appraisal and assessment principles, practices and techniques and relevant tax laws and rules. Working knowledge of effective managerial and supervisory practices and principles. Working knowledge of electronic data processing procedures as they relate to appraisal practices. Ability to develop effective valuation and assessment techniques and practices, to analyze reports and recognize the various factors affecting property values. Ability to analyze sales data and other market data to establish assessed values.

Ability to plan, direct, prioritize, and evaluate the work of the property appraisal staff and to administer the ongoing appraisal and assessment of citywide residential property or other property as assigned. Ability to effectively supervise and train appraisers. Ability to speak effectively before groups and to meet and deal tactfully with property owners, the public, and public officials. Ability to communicate effectively both orally and in writing. Ability to develop and maintain effective working relationships. Ability to maintain adequate attendance.

Training and Experience:

Two years of related experience in residential property appraisal and assessment experience comparable to that gained as a Property Appraiser 4 with the City of Madison which involved leadership and/or administrative responsibilities. Such experience would normally be gained after graduation from an accredited college or university with a Bachelor's Degree in Real Estate, Business Administration, or a related field. Other combinations of training and/or experience which demonstrate the possession of the knowledge, skills and abilities necessary to perform the duties of this position will also be considered.

Necessary Special Qualifications:

Possession of a valid driver's license or the ability to otherwise meet the transportation requirements of the position. Certification by the State of Wisconsin as an Assessor 2 prior to appointment. Certification at the Assessor 3 level prior to the completion of the probationary period.

Department/Division	Comp. Group	Range
Office of the City Assessor	18	12

Approved: _____
Brad Wirtz
Human Resources Director
Date