



City of Madison

City of Madison
Madison, WI 53703
www.cityofmadison.com

Master

File Number: 54854

File ID: 54854

File Type: Resolution

Status: Items Referred

Version: 1

Reference:

Controlling Body: COMMON
COUNCIL
EXECUTIVE
COMMITTEE

File Created Date : 02/25/2019

File Name: Delete the classifications of Assistant City Assessor Commercial (CG18, R13), Assistant City Assessor Residential (CG18, R12), and Assessment Services Supervisor (CG18, R08), and create new classifications of Assessment Business Systems Manager and Assess

Final Action:

Title: Delete the classifications of Assistant City Assessor Commercial (CG18, R13), Assistant City Assessor Residential (CG18, R12), and Assessment Services Supervisor (CG18, R08), and create new classifications of Assessment Business Systems Manager and Assessment Operations Manager, both in CG 18, Range 14. Recreate position #709 of Assessment Services Supervisor as the Assessment Business Systems Manager and reclassify current Assessment Services Supervisor (CG 18-08), Sally Sweeney, to the Assessment Business Systems Manager position. Recreate vacant position #727 of Assistant City Assessor Commercial as the Assessment Operations Manager in CG18, R14. Delete position #4123 of Assistant City Assessor Residential and recreate it as a Property Appraiser 4 in CG 16, R21.

Notes:

Sponsors: Paul R. Soglin

Effective Date: 03/25/2019

Attachments: PB Memo Assessor's Office restructure 3-2019.pdf, Assessment Business Systems Manager 2019.pdf, Assessment Operations Manager 2019.pdf, Assr's Office Org Charter 2018.pdf, assessor office organizational chart 2019.pdf

Enactment Number: RES-19-00251

Author: Tory Larson, HR Analyst

Hearing Date:

Entered by: inewman@cityofmadison.com

Published Date:

Approval History

Version	Date	Approver	Action
1		Brent Sloat	Approve

History of Legislative File

Ver- sion:	Acting Body:	Date:	Action:	Sent To:	Due Date:	Return Date:	Result:
1	Human Resources Department	02/25/2019	Referred for Introduction				
	Action Text:	This Resolution was Referred for Introduction					
	Notes:	Finance Committee (3/11/19), Personnel Board (3/6/19), Common Council (3/19/19)					
1	COMMON COUNCIL	03/05/2019	Refer	FINANCE COMMITTEE		03/11/2019	Pass
	Action Text:	A motion was made by Baldeh, seconded by Verveer, to Refer to the FINANCE COMMITTEE. The motion passed by voice vote/other.					
	Notes:	Additional referral to Personnel Board.					
1	FINANCE COMMITTEE	03/05/2019	Referred	PERSONNEL BOARD		03/06/2019	
	Action Text:	This Resolution was Referred to the PERSONNEL BOARD					
	Notes:						
1	PERSONNEL BOARD	03/06/2019	Return to Lead with the Recommendation for Approval	FINANCE COMMITTEE		03/11/2019	Pass
	Action Text:	A motion was made by Denny, seconded by Mitchell, to Return to Lead with the Recommendation for Approval to the FINANCE COMMITTEE. The motion passed by voice vote/other.					
1	FINANCE COMMITTEE	03/11/2019	RECOMMEND TO COUNCIL TO ADOPT - REPORT OF OFFICER				Pass
	Action Text:	A motion was made by Verveer, seconded by Wood, to RECOMMEND TO COUNCIL TO ADOPT - REPORT OF OFFICER. The motion passed by voice vote/other.					
	Notes:						
1	COMMON COUNCIL	03/19/2019	Refer	COMMON COUNCIL EXECUTIVE COMMITTEE			Pass
	Action Text:	A motion was made by Baldeh, seconded by Carter, to Refer to the COMMON COUNCIL EXECUTIVE COMMITTEE. The motion passed by voice vote/other.					
	Notes:						

Text of Legislative File 54854

Fiscal Note

The proposed resolution reclassifies three positions in the Assessor's Office. The projected cost of the increase, including benefits, is \$2,114. The position changes are listed below:

- Delete the Assessment Services Supervisor and recreate it as an Assessment Business Systems Manager
- Delete the Assistant City Assessor-Commercial and recreate it as an Assessment Operations Manager
- Delete the Assistant City Assessor-Residential and recreate it as an Appraiser

Title

Delete the classifications of Assistant City Assessor Commercial (CG18, R13), Assistant City Assessor Residential (CG18, R12), and Assessment Services Supervisor (CG18, R08), and

create new classifications of Assessment Business Systems Manager and Assessment Operations Manager, both in CG 18, Range 14. Recreate position #709 of Assessment Services Supervisor as the Assessment Business Systems Manager and reclassify current Assessment Services Supervisor (CG 18-08), Sally Sweeney, to the Assessment Business Systems Manager position. Recreate vacant position #727 of Assistant City Assessor Commercial as the Assessment Operations Manager in CG18, R14. Delete position #4123 of Assistant City Assessor Residential and recreate it as a Property Appraiser 4 in CG 16, R21.

Body

Resolution deleting the classifications of Assistant City Assessor Commercial (CG18, R13), Assistant City Assessor Residential (CG18, R12), and Assessment Services Supervisor (CG18, R08), and creating new classifications of Assessment Business Systems Manager and Assessment Operations Manager, both in CG 18, Range 14.

Be it further resolved that position #709 of Assessment Services Supervisor is deleted and recreated as the Assessment Business Systems Manager and current incumbent, Sally Sweeney, is reallocated to the Assessment Business Systems Manager position.

In addition, vacant position #727 of Assistant City Assessor Commercial is deleted and recreated as the Assessment Operations Manager in CG18, R14.

Finally, position #4123 of Assistant City Assessor Residential is deleted and recreated as a Property Appraiser 4 in CG 16, R21, all in the Assessor's Office operating budget, thereof.

TO: Personnel Board

FROM: Victoria Larson, Human Resources

DATE: February 7, 2019

SUBJECT: Assessment Business Systems Manager, Assessment Operations Manager and Property Appraiser 4

The City Assessor, Michelle Drea, is recommending creation of a new classification of Assessment Business Systems Manager and a new classification of Assessment Operations Manager. Ms. Drea is also recommending the creation of another Property Appraiser 4 position. Due to vacancies in the management level and appraiser vacancies, Ms. Drea has taken this opportunity to assess the overall structure of the Assessor's Office. These new classifications will assist with the work load and day-to-day operations of the Assessor's Office. After talking with Ms. Drea and reviewing the proposed position descriptions I recommend the following for the reasons outlined in this memo:

- Delete the classifications of Assistant City Assessor Commercial (CG18, R13), Assistant City Assessor Residential (CG18, R12), and Assessment Services Supervisor (CG18, R08), and create 2 new classifications in the Assessor's Office: Assessment Business Systems Manager and Assessment Operations Manager, both in CG 18, Range 14.
- Recreate position #709 of Assessment Services Supervisor as the Assessment Business Systems Manager and reclassify current Assessment Services Supervisor (CG 18-08), Sally Sweeney, to the Assessment Business Systems Manager position.
- Recreate vacant position #727 of Assistant City Assessor Commercial as the Assessment Operations Manager in CG18, R14.
- Delete position #4123 of Assistant City Assessor Residential and recreate it as a Property Appraiser 4 in CG 16, R21.

Currently, the structure of the Assessor's Office includes the following management positions: The City Assessor, one Assistant City Assessor Residential, one Assistant City Assessor Commercial, and one Assessment Services Supervisor. The Assistant City Assessor Residential supervises the residential appraisal unit which consists of ten Property Appraisers and Assessment Technicians, including a leadworker. The Assistant Commercial City Assessor supervises the commercial appraisal unit which consists of five Property Appraisers and Assessment Technicians. The Assessment Services Supervisor manages the Property Listers and administrative support staff which consists of five staff members. (Please see the current organizational chart attached.) Both Assistant Assessors have been vacant for over six months. In addition, the Property Appraiser 4 residential leadworker incumbent has been on leave of absences for four of the past six months with a resignation in effect March 5, 2019. The absences and vacancies have given Ms. Drea time to evaluate the organizational structure and the reallocation of these duties on a permanent basis. It became clear that the office was operating with a management heavy structure. However, the real need facing the office and City is resources for appraisal work (impending annexations of the Town of Madison and Burke increasing the need) and IT/data based staff to transition to a Computer Assisted Mass Appraisal (CAMA) system within the next two years.

Because of the need for more appraisal work, Ms. Drea is recommending that the 2 Assistant City Assessor positions be combined into one Operations Manager-type position, with primary responsibility for the day-to-day supervision of the Property Appraisers and Assessment Technicians. This would allow for the extra manager position to be recreated into another Property Appraiser 4, who could perform appraisal

work in support of the office. In addition, the Assessment Services Supervisor has taken on higher-level work over the past few years because of the other management vacancies and a shift to a new CAMA system, which will increase the efficiency and accuracy of data collected by the Assessor's Office. This will increase the public's confidence in the Office and the appraisals that are made. The new proposed management positions with the recommended titles of Assessment Operations Manager and Assessment Business Systems Manager will work closely together to ensure smooth operations with the entire Assessor's Office, reporting directly to the City Assessor. Both positions have management responsibilities and programmatic authority over their assigned units. This structure also provides consistency with many other City agencies, who have 2 high-level managers reporting to a department head, such as Fleet Services, Department of Civil Rights, and IT.

The Assessment Operations Manager will supervise both commercial and residential assessors and provide more assistance with public relations activities. This would eliminate the residential and commercial divisions being supervised separately and allow for more cross-training of all appraisers. This position would direct the day to day activities, the hiring, training, evaluation, and discipline of all the appraisers. The Assessment Operations Manager would also have increased public relations responsibilities by developing a revaluation public relations campaign, representing the City Assessor at meetings of the City Council and Mayor's Office, and representing the City Assessor at various other types of meetings. By having a manager more focused on day-to-day activities, this would eliminate the need for the Property Appraiser 4 Leadworker over the Residential unit and would permit more appraisal work to be conducted.

The Assessment Business Systems Manager will continue to supervise Property Lister and administrative support staff, but with the added responsibility for data management and strategic planning. This position will also take the lead with the CAMA data migration which includes establishing office protocols and training systems, and will continue to act as the IT liaison for this and other technology related needs. In addition, this position will now assist with the assessment appeals process by overseeing the preparation of meeting materials, researching board actions, responding to board requests, ensuring compliance to statutory mandates for notices to property owners and auditing appraiser reports. Finally, as noted, this position will have more direct involvement in working with the City Assessor to establish the strategic direction of the office. Ms. Sweeney has been performing these functions over the last 2 years because of the vacancies in the other manager positions, so reclassing her to this new position is appropriate.

The recommendation is to place the Assessment Business Systems Manager and the Assessment Operations Manager into CG 18, Range 14. Regarding the Assessment Operations Manager, this would be one range higher than the previous placement of the Assistant City Assessor Commercial. However, by taking on the entire appraisal staff, it is appropriate that the additional scope result in an increased salary range. The Assessment Business Systems Manager placement is significantly higher than the previous placement of the Assessment Services Supervisor. However, this position has taken on higher-level management tasks for the office, including the strategic management and oversight of all data for the office. The impact of this position is significant in that if data is incorrect, it could result in improper appraisals, costing the City significant property tax revenues. Again, having both managers in the same range, reporting directly to the City Assessor is similar to other agency structures. Placement in Range 14 would put these positions 3 ranges below the City Assessor, and 3 ranges above the Property Appraiser 4. This is also consistent with other positions such as the Community Development Program Managers, which have significant responsibility for major programs within the Community Development Division (Child Care and Neighborhood Services) and report directly to the Community Development Division Director.

Finally, Ms. Drea would like to recreate the Assistant City Assessor Residential into a hybrid Property Appraiser 4 position. This Property Appraiser 4 will assist both the residential and commercial units with property appraisal duties in order to address workload issues within those units. It is impossible to accurately predict area sales and permits which creates disparity in workload each year. Currently, the infrastructure is reactive and inefficient. Allocating a support resource directly into the budget rather than systemically relying on responses such as overtime is a more effective use of resources. Also the creation of the additional Property Appraiser 4 will help both commercial and residential assessment units. This position will include personal property valuation and multi-unit commercial and residential properties, thereby, creating a bridge from residential to commercial work. The work load of this unit is anticipated to increase with the future annexation of the Town of Madison.

We have prepared the necessary Resolutions to implement these recommendations.

CG/Range	2019 Annual Minimum (Step 1)	2019Annual Maximum (Step 5)	2019 Annual Maximum +12% longevity
16/21	\$69,715	\$81,950	\$91,784
18/8	\$63,911	\$75,841	\$84,942
18/12	\$75,841	\$91,560	\$102,547
18/13	\$79,611	\$95,769	\$107,262
18/14	\$83,377	\$100,374	\$112,419

cc: Michelle Drea-City Assessor
 Greg Leifer—Employee and Labor Relations Manager

ASSESSMENT BUSINESS SYSTEMS MANAGER

CLASS DESCRIPTION

General Responsibilities:

This is responsible administrative and managerial work in planning, organizing, directing, and coordinating the administrative and data management functions of the City Assessor's Office. Work involves responsibility for participation in long-term and strategic planning, policy development, and data management. Property data has social, environmental and economic value, and needs to be managed as a public resource. This position will lead the office effort to manage data efficiently and effectively. The employee works under the general supervision of the City Assessor who review the work upon completion for conformance with objective and/or policy level determinations.

Examples of Duties and Responsibilities:

Assist the City Assessor in planning, organizing, and controlling all operation of the department. Develop and recommend standards and controls to measure the degree of operational effectiveness, and review various functions on an ongoing basis to verify effectiveness and economy. Serve as the Civil Rights Coordinator for the Assessor's Office.

Develop departmental capital and operating budgets and payroll forecast for fiscal years. Process departmental budgetary forms as needed. Develop and maintain departmental budget account status records. Monitor office budget.

Direct the customer service functions of the Assessor's Office including providing information or clarification of procedure or process to the public and other agencies. Compile, review, and transmit special report requests. Monitor and respond to inquiries to the Assessor email box.

Maintain all assessment and property listing data. Ensure all local and state requirements are met in the maintenance of data. Prioritize efficient practices to allow sharing of the data at minimal cost. Compile and remit data in meaningful route for Performance Excellence purposes. Serve as Assessor's Office liaison to the IT Department. Coordinate and track open records requests in the office in concert with the City Assessor.

Supervise and control CAMA system input/output, coordinate process activities, system development, and maintenance of assessment data. Establish office protocols and training systems. Orient, train, and supervise data management personnel on CAMA and related requirements. Coordinate system requirements and maintenance with City, County, and State IT Departments.

Oversee and participate in the preparation of the assessment roll. Oversee and prepare assessment information which is released to the Mayor, Common Council, department/division heads, and the news media. Coordinate with IT on related problems and enhancements. Develop and implement the design of new and existing IT programs.

Supervise audit batch processing and maintenance reports for the real estate and personal property roll. Plan, organize, direct, and have final responsibility for the preparation of the assessment roll schedule to ensure that the final assessment roll, indexes, processing deeds, plat, lot splits, combinations, class shifts, and reports are complete and accurate and the statutory requirements are met.

Compile relevant data and prepare various reports mandated by statute to be remitted to the State Department of Revenue and other agencies. These include, but are not limited to, the Municipal Assessment Report (MAR), TIF Assessment Report (TAR), Statement of Assessment (SOA), and the Annual Assessment Report (AAR). Maintain Sales Ratio Study data for management review and submission to various agencies. Oversee and coordinate the review, analysis, and input of the Manufacturing Assessments submitted by the State Department of Revenue. Oversee and coordinate the distribution of the monthly building permits produced by building inspection. Prepare annual property assessment news release including compiling appropriate data.

Orient, train, and supervise the administrative, data management, and property listing staff. Provide general leadership to staff, provide consultation and advice on more complex and judgmental aspects of the work, and participate in the full range of employee relations. Assist in the interview and hiring process for all employees. Plan, organize, assign, monitor, and evaluate diverse Assessor's Office programs, staff and activities. Review work assignments, requirements, and review work product for completeness and accuracy. Coordinate staff schedules to ensure coverage for the office.

Oversee departmental payroll activities. Oversee and maintain departmental personnel transactions with Human Resources. Process necessary personnel forms and documents. Liaison with Human Resources and Payroll in resolving departmental issues.

Oversee and coordinate purchasing documents for the department utilizing required systems. Research purchasing problem and approve departmental invoices for payment and auditing utilize required systems.

Organize and coordinate administrative support for the Board of Assessors and Board of Review in accordance with Wisconsin State Statutes, governing policies and operating procedures. Oversee the preparation of agendas, reports, indexes, and proceedings. Oversee and assist in the development of a procedural manual for processes. Research Board actions. Respond to Board requests. Monitor and ensure compliance to statutory mandates for notices to property owners.

During Open Book, audit appraiser reports for completeness, accuracy, and statutory compliance. Prepare notices for property owners, ensure mailings are timely. Prepare reports for the City Assessor as required.

Perform related work as required.

QUALIFICATIONS

Training and Experience:

Generally, positions in this classification will require:

Three years of responsible experience in a comparable assessment program including data system development and maintenance responsibilities, which included or was supplemented by staff leadership and program administrative responsibilities. Such experience will normally be gained after graduation from an accredited college or university with a degree in Public or Business Administration or a related field. Successful completion of the City of Madison's Leadership Academy, including the project presentation and job shadowing assignment, may be used to substitute for the leadership experience requirement. Other combinations of training and/or experience, which can be demonstrated, to result in the possession of the knowledge, skills and abilities necessary to perform the duties of this position will also be considered.

Specific training and experience requirements will be established at the time of recruitment.

Knowledge, Skills and Abilities:

Thorough knowledge of applicable governmental assessment activities. Thorough knowledge of assessment procedures, policies, and statutory requirements with annual data submission deadlines for the State Department of Revenue. Thorough knowledge of applicable principles of administration and management including supervisory practices, and budget development and control. Thorough knowledge of the principles of data management including development and maintenance of effective systems for tracking relevant data. Thorough knowledge of and ability to use computer software applicable to the duties of the position. Working knowledge of open records statutes and requirements. Working knowledge of the Wisconsin Property Assessment Manual, state statutes, and case law governing the assessment process. Ability to plan and prioritize the work of staff and to hire, train, assist, supervise, evaluate, discipline, and counsel a large administrative and technical/paraprofessional staff. Ability to analyze administrative and operational problems and recommend and/or undertake practice solutions. Ability to collect, review and interpret data and to prepare statistical and narrative reports. Ability to establish and maintain effective working relationships. Ability to work effectively with multicultural populations. Ability to communicate effectively, both orally and in writing. Ability to maintain adequate attendance.

Necessary Special Qualifications:

Certification by the State of Wisconsin as an Assessment Technician within the probation period. Failure to obtain the required certification during probation will result in removal from the position, absent extenuating circumstances.

The incumbent may be expected to attend meetings and provide presentations outside the normal work schedule, including evenings.

Physical Requirements:

Work is performed in an office environment and the incumbent will be expected to use office equipment such as a computer, telephone, and copier. Work is generally sedentary with the incumbent spending long periods of time working at a desk and on a computer.

Department/Division	Comp. Group	Range
Assessor's Office	18	14

Approved: _____
Harper Donahue IV
Human Resources Director

Date

ASSESSMENT OPERATIONS MANAGER

CLASS DESCRIPTION

General Responsibilities:

This is professional and managerial work in developing, implementing, and managing the City's 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 of all commercial, residential, agricultural, and personal property throughout the City in compliance with the Wisconsin Property Assessment Manual, applicable state statutes, and case law. Work involves responsibility for long term program planning and policy development, and responsibility to develop and maintain training programs for all levels of appraisal staff including ethical standards due to the fiduciary nature of the work. The employee works under the general supervision of the City Assessor, who reviews the work upon completion for conformance with strategic objectives and 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, residential, agricultural, and personal property valuations on a citywide basis. Hire, train, supervise, evaluate, promote and discipline staff when appropriate. Develop and recommend standards and controls to measure the degree of operational effectiveness, analyze workloads, and recommend preliminary budgets. Review various functions on an ongoing basis to verify and sustain effectiveness and economy. Prepare and/or review various reports and studies relative to office operations.

Participate in the overall management of the City Assessor's Office. As a member of the Department's management team, assist with completion of required analysis and documentation for the Wisconsin Department of Revenue, the City's Finance Department, and other impacted agencies. Provide for the continuity of office operations during the absence of the City Assessor by carrying out supervisory and administrative functions as assigned.

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. Develop and recommend to the City Assessor policies and operating practices relative to the valuation program. Implement and/or interpret related standards. Develop a strategic plan for revaluation in both geographic scope and by property type as required by applicable state statutes and the Wisconsin Property Assessment Manual.

Annually confirm a stratified commercial sales analysis is accurate for use when reviewing the Wisconsin Department of Revenue's commercial sales analysis and make recommendations.

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.

Review legislation related to property tax and exemption issues. Provide analysis and plan a response as needed.

Develop a revaluation public relations campaign to successfully negotiate the process for property owners and the City.

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

Training and Experience:

Generally, positions in this classification will require:

Three years of directly related experience in commercial property appraisal and assessment experience, which included or was supplemented by 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. Successful completion of the City of Madison's Leadership Academy, including the project presentation and job shadowing assignment, may be used to substitute for the leadership experience requirement. Other combinations of training and/or experience which can be demonstrated to result in the possession of the knowledge, skills and abilities necessary to perform the duties of this position will also be considered.

Specific training and experience requirements will be established at the time of recruitment.

Knowledge, Skills and Abilities:

Thorough knowledge of relevant commercial and residential property appraisal and assessment principles, practices and techniques and relevant state statutes and case law. Thorough knowledge of applicable governmental assessment activities. Thorough knowledge of and ability to use computer software applicable to the duties of the position. Knowledge of the full range of supervisory principles and practices, labor relations and personnel

management. 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 residential, 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 effectively supervise and train Appraisers. Ability to communicate effectively, both orally and in writing. Ability to show empathy and compassion in difficult situations. Ability to deal tactfully and firmly with potentially hostile individuals and in tense situations. Ability to analyze complex valuation problems and recommend logical and practical solutions. Ability to independently prepare, present, and defend analytic findings. Ability to develop and maintain effective working relationships. Ability to work effectively with multi-cultural populations. Ability to maintain adequate attendance.

Necessary Special Qualifications:

Possession of a valid driver’s license.

Certification by the State of Wisconsin as an Assessor 2 and 3 upon appointment.

The incumbent may be expected to attend meetings and provide presentations outside the normal work schedule, including evenings.

Physical Requirements:

Employees must have the ability to physically access various types of property throughout the City. Employees will be expected to walk over uneven terrain, climb stairways, and otherwise access property. As the nature of the office is cyclical, there are also long periods of sedentary work at a computer.

Department/Division	Comp. Group	Range
Office of the City Assessor	18	14

Approved: _____
 Harper Donahue IV Date
 Human Resources Director