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 Residental 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