

REPORT NO: 13-84
DATE: 12/19/2013
ANALYST: Michael Hebner

CLASSIFICATION REPORT

PROPOSED TITLE: Director, Assessments

CURRENT TITLE: Director, Assessments

INCUMBENT: Vacant

REASON FOR REQUEST: Changes require review to verify proper placement of the position in the appointed service

DATE QUESTIONNAIRE SUBMITTED: 12/9/2013

DATE OF PREVIOUS STUDY: N/A

DISPOSITION OF PREVIOUS STUDY: N/A

PERSONS INTERVIEWED: Patrick Todd, City Assessor

RECOMMENDATION: Change the total points allocated to the Director, Assessments from 598, (Grade 13) to 650 (Grade 14), by increasing the factor rating for Prerequisite Knowledge from 65 to 70, and for Decisions and Actions from 65 to 75, and, and for Relationship Responsibility from 65 to 70, and for Effort from 65 to 70, and lowering the rating for Supervisory Responsibility from 35 to 30.

The Director Assessment was last reviewed in 2008. There has been new legislation and changes in industry best practices since the last review which impact the position. In addition, the duties and responsibilities have evolved. Whereas in the past the position had duties that overlapped with the classified Manager Assessment Services and it was rated just above that position, now the position will function more like an assistant department head, and will be rated closer to the appointed City Assessor position (The Department Head). The job will be the second in command in the Assessor's Office, and will be involved in all aspects of executive management for the Department.

The duties and responsibilities of the position are listed below:

- Assume overall command of the Department in the absence of the City Assessor
- Manage the Department's assessment operation to insure compliance with the Department of

Revenue, and other State, and City requirements.

- Provide executive level direction and management of the Department's human resource plan including but not limited to: hiring, training, coaching, evaluating, promoting, and grievance resolution. Ensure Department compliance with educational requirements of the State Board of Assessors
- Department liaison with labor representatives, the Civil Service Commission, arbitrators, mediators, etc. concerning labor relations
- Manage the Department's policies, procedures, and strategic direction to ensure that they provide a framework for an accurate, effective, and safe workforce.
- Manage the Department's internal and external communications to staff, Council Members, taxpayers, and the media
- Represent the Department at legislative hearings, City and County board meetings, and taxpayer meetings
- Provide management and staff training on new legislation and industry best-practices.
- Assist the City Assessor in planning, directing and implementing the Department's short and long term goals, objectives, and strategies.
- Provide management for and advise the City Assessor on the Department's business plan, budget, space, and staffing resources.
- Represent the Department on city-wide projects and initiatives. Interface with other Departments, divisions, community/governmental agencies and organizations, professionals and the public to coordinate services and activities
- Investigate and respond to inquiries or complaints from citizens or public officials concerning tax and valuation issues that have not been resolved by subordinates.
- Advise City Elected Officials and IGR concerning property tax legislation and policy decisions

POSITION ANALYSIS

PREREQUISITE KNOWLEDGE

The position requires a Bachelor's Degree in Real Estate, Architecture, Engineering, or an equivalent degree and 6 years of experience that includes prior director or lead manager/supervisory experience within a large municipal or private sector appraisal or assessing office, which demonstrates competency in assessment/appraisal, and leadership, problem-solving, inter-personal, and motivational skills. The person hired will need to have achieved a Certified Senior Accredited Minnesota Assessor Designation (SAMA), with the continuing education required to maintain the license. These requirements stated above represent a change from the historical requirements in the areas of the type and quality of experience required, and in the certification required, both of which are now expanded beyond historical requirements. A rating of **70 points** is appropriate for the level of education and experience required.

DECISIONS AND ACTIONS

The job is the second in command in the Assessor's Office and is involved in all aspects of executive management for the Department. Decisions and actions of the position cover several areas in the Assessor's Office, including:

Directing: The position will set management and Department-wide goals and expectations.

Administration: It will assume overall command of the Department in the absence of the City Assessor. The position will represent the Department on committees and at meetings. It will have the authority to make executive decisions on behalf of the Department and the City Assessor. The position will have responsibility for operational activities in the Department.

Planning: The position will be responsible for executing the Department's annual business plan, and for articulating the philosophy, policy, procedures, and objectives, and the methodology to be used. The position will approve the Department's matrix to insure compliance with the State, City and Department of Revenue requirements

Budgeting: The position will execute financial decisions, maintain accounting and management control of revenue, and keep costs in-line within the Department's approved budget (i.e. approves day-to-day financial decisions, including: payroll, purchases and expenditures)

Staffing: The position will direct the Human Resource function within the Department. It will provide executive level direction and management of the Department's human resource plan including but not limited to: hiring, training, coaching, evaluating, managing performance, and grievance resolution. The position will assist in ensuring the Department maintains a positive, respectful, and diverse work force and work environment. It will approve all education, training and conference requests by management and staff, and ensure that all staff complies with the educational requirements of the State Board of Assessors.

Projects: The position will be involved in creating and approving projects that are requested by City Council Members, City Departments, taxpayers, and the media.

Coordinating: The position will identify and implement cross-departmental business process improvements as needed or required.

The position is responsible for the following

- Sales Ratio Reports to the Department of Revenue
- Policy, Procedure, and Training manual for the Department
- Contract appraisers and consultants hired for tax court petitions
- IT upgrades and long term technology strategy for the Department
- Results Minneapolis: Assessor's Office
- Citizen Survey
- Employee Survey
- PerformMinneapolis in the Assessor's Office
- Work related to the Racial Equity Gap
- Succession Planning
- Enterprise Land Management Committee

The following decisions and situations are subject to the review and approval of the City Assessor who supervises the position under review: Final budget submissions to the Mayor; final decisions that pertain to legal actions against the Department or its staff; and any events or incidences that place the Department or its staff at risk either in the office or in the field.

A rating of **75 points** will be assigned. Jobs at this level manage in departments with significant impact on expenditures or revenue. Others manage a branch or sub-function of a large or major department. At this level the job is responsible for projects, plans, budgeting, staffing, and related operating decisions for a significant organization, and work is of considerable variety and complexity, usually involving all phases of a major function. Matters dealt with are broad in scope with complex and unusual problems being encountered with considerable frequency. Performance has considerable influence on finances or delivery of services; errors or inadequacies would cause very serious and notable inconvenience, embarrassment, or expense. At this level the incumbent is expected to make decisions and take action on complex problems that arise and to develop solutions to these problems using advanced principles and techniques and considerable original thinking. Work is done under general supervision in accordance with broadly stated policies or principles. Most work is of an advanced nature and calls for the exercise of independent judgment. Decisions and actions are subject to prior approval only in unusual cases or where considerable expense is involved.

SUPERVISORY RESPONSIBILITY

The position will supervise the Manager of Assessment Services; the Chief Appraiser; and three Supervisor Real Estate Assessment positions one in commercial assessment, one in residential assessment, and one in apartment and condominium assessment and homestead/classification. It will have management authority over more than 30 staff. A rating of **30 points** is appropriate for the level of supervisory responsibilities present in the job.

RELATIONSHIPS RESPONSIBILITY

The position will entail daily contact with the City Assessor to give progress reports on issues such as the strategic and business planning, budget, sales ratio, media inquiries, day-to-day operations, and other concerns. The position will have daily and as needed contact with the positions it supervises the Manager of Assessment Services, Chief Appraiser, and the three Supervisor Real Estate Assessment positions regarding the status of commercial assessment, residential assessments, and apartment and condo and homestead/classification, and activities and reports related to assessment such as the assessment calendar report, technology report, modelling report; elected official/media/taxpayer data request report etc. It will confer with the positions it supervises regarding tax court report, challenges and resource allocations.

The position will have contact with the Community Planning and Economic Development Department regarding tax increment finance (TIF) district questions, stadium and other development issues, assessment and tax questions, and sale and ownership questions. It will have contact with the Finance and Property Services Department regarding bond rating data and information, and assessment/tax base data. The position will interact with staff from the Regulatory Services Department regarding ownership and property information and property tax program administration. It will interact with Property Services regarding office logistics and configuration. The position will work with the Communications Department on media,

neighborhood, public, and council aide data requests. It will work with the Neighborhood and Community Relations Department on neighborhood group presentations and related matters. The position will provide the Mayor's staff with real estate and property tax trend information when requested. It will work with Council Members and their staff to respond to constituent issues and neighborhood trend concerns. The position will interact with City Department Heads and other staff at enterprise wide committee meetings. It will have periodic meetings with labor union representatives as a liaison with these groups and at Labor-Management meetings, and official hearings involving staff from the Assessor's Office.

Outside the City the position will represent the City Assessor's Office with the media, responding to data inquires as required. It will be in contact with the Hennepin County Attorney's Office regarding tax litigation issues, scheduling, negotiation, and settlements. It will work the Hennepin County Assessor's office regarding property tax program administration and compliance. The position will work the Intergovernmental Relations Department (IGR) regarding property tax program administration. It will have monthly contact with the Minnesota Department of Revenue regarding property tax program administration and compliance.

A rating of **70 points** will be assigned. Jobs at this level require considerable tact and diplomacy. Issues dealt with are of broad or City-wide impact and involve achieving objectives which can require considerable persuasion, where cooperation is essential, and issues often are controversial. Contact with the media and the general public requires considerable skill as most interactions revolve around sensitive issues. At this level the job typically represents the division or department before the City Council, and other important bodies. At this level the job is in a high-level leadership position in terms of communication for the area(s) that the job represents. These are high level jobs which are called on to deal with sensitive and important matters on a frequent basis. They often speak on behalf of the City on matters relating to a function or an operation. This level requires highly developed communications skills and very strong interpersonal skills.

WORKING CONDITIONS

The position will work in an office setting with some field inspection work on complex tax court cases. It will attend neighborhood meetings which can be tense in some situations when taxpayers get emotionally charged about increasing property values and property taxes. A rating **20 points** will be applied. This level includes the executive positions in the City.

EFFORT

The job has the no unusual physical requirements, as is true of most office based jobs. It requires much mental effort in assisting in the management and oversight of the Assessment activities in the City. There is mental effort in the managerial activities and duties including, planning, organizing, and communicating, monitoring, and making adjustments and taking controlling actions when appropriate. There is mental effort in preparing documentation and presentations for the budget, business plans, and Results Minneapolis. The position will work under pressure in dealing with assessment cycles and deadlines, and with legislative issues. It will work under pressure in dealing with high volume and high profile tax court petitions. There will be mental effort in dealing with personnel activities and grievances. The position will be involved in dealing with preparation for lawsuits against the City Assessment processes and this will entail

effort in planning and organizing responses. The position will be a point of contact for sensitive and often controversial information about assessment actions and this adds to the effort required.

A rating of **70 points** will be assigned. Jobs at this level are executive level positions which primarily require mental effort. In these positions there is a high level accountability for planning, coordinating, and monitoring activities which requires mental effort and creates stress. These are executive level decision making positions and there are competing priorities which require mental effort in developing alternative recommendations or plans for budgets, personal actions, department initiatives, and solutions for identified problems. There are numerous pressures to meet deadlines on projects, reports, budget preparation, plan development, handling inquiries, etc. The physical effort in these positions corresponds to that required in most executive positions working in an office environment.

According to the City Assessor the proposed position meets the criteria for appointed positions under the Minneapolis Code of Ordinance, Section 20.1010 as follows:

1. The person occupying the position must report to head of the designated City Department or the designated City Department Head's Deputy.

Answer: The Director, Assessments reports directly to the City Assessor

2. The person occupying the position must be part of the designated Department Head's management team

Answer: The Director, Assessments is a member of the management team

3. The duties of the position must involve significant discretion and substantial involvement in the development, interpretation, or implementation of City or Department policy.

Answer: The Director, Assessments manages day-to-day operations and has authority and discretion over budgetary expenditures, policy decisions and execution of the department's strategic plan

4. The duties of the position must not primarily require technical expertise where continuity in the position would be significant.

Answer: The Director, Assessments requires a combination of technical knowledge in property taxation, organizational knowledge in budgeting and human resources, and procedural knowledge to administer the department's policies, practices and procedures

5. There is need for the person occupying the position to accountable to, loyal to, and compatible with the Mayor, City Council, and the Department Head.

Answer: The Director, Assessments will be accountable to, loyal to, and compatible with the Mayor, City Council, and the City Assessor

RECOMMENDATION:

Change the total points allocated to the Director, Assessments from 598, (Grade 13) to 650 (Grade 14), by increasing the factor rating for Prerequisite Knowledge from 65 to 70, and for Decisions and Actions from 65 to 75, and, and for Relationship Responsibility from 65 to 70, and for Effort from 65 to 70, and lowering the rating for supervision form 35 to 30.

CLASSIFICATION FACTOR WORKSHEET								
Benchmark Classifications	Factors						Total Points	Grade Level
	1	2	3	4	5	6		
Supervisor Real Estate Assessment	55	55	15	55	20	50	488	10
Chief Appraiser	60	60	5	60	20	50	515	11
Manager Assessment Services	65	65	10	65	20	55	563	12
Director Assessments	65	65	35	65	20	65	598	13
City Assessor	80	80	30	80	20	75	715	15
PROPOSED CLASSIFICATION								
Director Assessments (Proposed)	70	75	30	70	20	70	650	14

1. Prerequisite Knowledge
2. Decisions and Actions
3. Supervisory Responsibility
4. Relationship Responsibility
5. Working Conditions
6. Effort

Executive Exemption

The position will pay more than the \$455.00 per week required. The primary duty of the position will be to manage the City Assessors Office. It will be the direct supervisor over assessment activities a customarily recognized subdivision of the enterprise. It will direct and supervise five fulltime positions and have management authority over 30 positions. The position will have the authority to make recommendations that will be given particular weight in the City System regarding the hiring, disciplining, firing, and or status changes for employees that are under its span of control.