

REPORT NO: 14-49
DATE: 11/13/2014
ANALYST: Michael Hebner

CLASSIFICATION REPORT

PROPOSED TITLE: Manager, Assessment Services (Appointed)

CURRENT TITLE: Manager, Assessment Services

INCUMBENT: Vacant (Scott Lindquist – Retiring)

REASON FOR REQUEST: Department requests review to ensure proper classification and to covert the position to appointed status

DATE QUESTIONNAIRE SUBMITTED: 10/28/2014

DATE OF PREVIOUS STUDY: N/A

DISPOSITION OF PREVIOUS STUDY: N/A

PERSONS INTERVIEWED: Rebecca Malmquist, Director Assessment Services
Patrick Todd, City Assessor
Scott Lindquist, Manager Assessment Services Retiring

RECOMMENDATION: Establish the position as Manager Assessment Services, (Appointed Grade 12, 558 Points)

With the current incumbent retiring the City Assessor felt now is a good time to access the impact that changes in technology and in assessing practices and regulations have had on the manager Assessment Services position. He also is requesting that the position be converted to the Appointed Service. The position as it currently functions is primarily responsible for directing the development and operation of the Computer Assisted Mass Appraisal (CAMA) system and all Assessment technology for the City of Minneapolis including managing the establishment of valuation modeling solutions for all property types; developing policies and procedures, and developing training, and manuals. It is responsible for preparing and managing the section budget; directing the research and development of short and long-term technology options; and performing related work as assigned.

The current duties and responsibilities are as follows:

- Supervise and coordinate the development and implementation of new computer systems and programs; serving as a liaison with the IT Department staff in developing and implementing new computer systems/applications by providing input/output requirements, and Department

standards.

- Develop and revise existing programs for end-user application; including developing specifications for obtaining software and/or hardware for Departmental application.
- Manage and monitor the operations, projects, and personnel of the Assessment Services section including work assignments, establishment of priorities, evaluation of work performance, individual development planning, approving payroll, hiring, selection, training of staff, and disciplinary activities.
- Supervise the execution of all State, County and City real estate assessment programs, including performance metrics and application of the Computer Assisted Mass Appraisal (CAMA) models for all Minneapolis real and personal property
- Coordinate classification and assessment functions to create abstracts and reports to assist local governments, school districts, City Departments, Department of Revenue and general public with tax assessment information as needed
- Oversee and coordinate the data management function of the Department, including security of the system, troubleshooting any software or hardware malfunctions, creating and maintaining systems and procedure manuals.
- Respond to Mayor, City Council, City and non-City departments and neighborhood groups on requests for information, assistance and professional advisement on real estate trends and property tax questions
- Lead the City's response to the Department of Revenue's audits on Equalization, Sales Ratios, and Local Government Aid (LGA). Rapidly respond to Inter-Governmental Relations (IGR) on new tax legislation; interpret and analyze impact for the City Assessor and elected officials
- Build and manage a workforce based on department goals, budget considerations, and staffing needs, including oversight of recruitment, selection, and appraisal.
- Represent the Assessor's office at Council meetings, City Department meetings, City and County meetings, neighborhood and community engagement initiatives, and taxpayer meetings
- Coordinate Open Book, City Board and Hennepin County Board of Appeal and Equalization processes.
- Direct the research and development of short and long-term technology options. Make recommendations to the City Assessor for equipment and programming required to enhance and streamline operations
- Train all new staff in CAMA theory and application with an emphasis on Minneapolis models and annual timelines and deadlines.
- Supervise mobile tablet system integration in the Department. Analyzes user workflow and software architecture and recommend improvements to systems or equipment to increase productivity and efficiency
- Define the scope of data processing problems and goals and identify data collection processes
- Develop and recommend administrative policies; assist City Assessor in developing and implementing Department goals and objectives; develop policies, procedures and manuals for the proper classification of real and personal property
- Direct and participate in long-term audits of computer systems and programs; analyze results of these systems; identify and implement changes to existing systems in order to bring them

up to city and industry standards for data security.

- Coordinate various work projects and outside contract work; help to develop contracts and specifications for vendors; Responsible for compliance to specification, approves contractor invoices and authorizes payment.
- Support executive level decision making by providing recommendations and input into strategic planning and Departmental policy design.
- Provide budgetary analysis for senior management to assist their decision making.
- Train, mentor, and coach employees on customer service techniques and assessment processes to increase both employee and customer satisfaction on every transaction
- Direct, instruct, and advise employees on: current real estate appraisal data, the valuation of real property, new legislation affecting valuation and assessment administration, real estate tax law, assessment procedures and public relations problems
- Inform and educate taxpayers on Minnesota real estate laws and procedures related to property tax assessment and real estate sales activity
- Promote a diverse, culturally competent, and respectful workplace

POSITION ANALYSIS

PREREQUISITE KNOWLEDGE

The position requires a Bachelor's Degree in Real Estate, Architecture, Engineering, Finance or equivalent degree, and 5 years of related experience which includes both assessing and technical support for a complex Assessment modeling system. The position requires strong knowledge of Govern, SQL Server, Access, ESRI GIS, SPSS, Crystal Reports, APEX, Narrative1 and Microsoft Applications in addition to other off the shelf database software packages to develop reports, maps and analyze data for the State, County, and City Departments. It requires a strong background in and knowledge of Minnesota's property tax statutes. The position requires extensive working knowledge of the Department of Revenue's Assessment Administration Manual and the Uniform Standard of Professional Appraisal Practice (USPAP) Standards to ensure the Department is aware of, understands, and correctly employs those recognized methods and techniques. It requires the ability to perform high-level statistical analysis that involves mathematical modeling, complex program evaluation. It requires a Minnesota State Assessor's License at the Accredited Minnesota Assessor (AMA) certification level and Senior Accredited Minnesota Assessor (SAMA) certification or equivalent within twelve (12) months of hire and a Valid Driver's License.

A rating of **65 points** is appropriate for the education and experience required, and will be assigned.

DECISIONS AND ACTIONS

The position is responsible for the development and operation of the Computer Assisted Mass Appraisal (CAMA) system, which is the basis of all assessment activity in the City, and comprises the whole assessment for a majority of properties in a given year. The position is responsible for all

assessment technology for Minneapolis including managing the establishment of valuation modeling solutions for all property types; developing policies, procedures, training, and manuals; preparing and managing the section budget; directing the research and development of short and long-term technology options. The position is the leadership point for all technology related to assessment including providing direction to Assessment Services staff.

Activities performed independently include planning and reviewing CAMA modelling design, population, analysis, and results. The position independently directs assignment of work to others. It independently plans quintile and Department of Revenue reports. It is responsible for the generation of and reporting of production reports, tax court reports, and sales reports.

The position has a high level of responsibility for analyzing information and formulating the City's Response to Minnesota Department of Revenue's audits on Equalization, Sales Ratios, and Local Government Aid (LGA). It is responsible for rapidly responding to Inter-Governmental Relations (IGR) on new tax legislation; interpreting and analyzing impact for the City Assessor and Elected Officials. It is responsible for supporting executive level decision making by providing recommendations and input into strategic planning and Departmental policy design. It provides budgetary analysis for senior management to assist their decision making.

Decisions of the position which are reviewed include personnel related decisions such as hiring, discipline, and termination of staff. Actions such as recommendations for business plan changes, and budget requests are subject to review. When the position is responding to requests for information from Elected Officials, State officials or the media it will consult with the higher level staff in the Assessor's Office before acting.

The rating of **65 points** will be assigned. Jobs at this level entail 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 and unusual 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 directly supervise two positions, an Assessor II and A Business Applications Manager. A rating of **5 points** is appropriate and will be assigned.

RELATIONSHIPS RESPONSIBILITY

Within the Assessor's Office the position has weekly contact with the Director of Assessments to coordinate the creation and distribution of production reports, sales reports, queries, lists, market trend reports, and to coordinate the use of Department resources. It has monthly contact with the City Assessor to coordinate the completion of the annual assessment and the model, and its defense and to coordinate the use of Department resources. The position has frequent contact with other supervisors in the Department regarding the creation and distribution of production reports, sales reports, queries, lists, market trend reports, and regarding the use of Department resources. It works with them regarding the defense of tax court cases involving multiple property types.

There is contact with other City Department's including the Information Technology (IT) Department regarding the orderly use of technology. The position has contact with the Community Planning and Economic Development Department regarding Tax Increment Financing (TIF) District questions and other questions related to new development including values, taxes, ownership and sales. The position works with the Procurement Division in Finance regarding equipment and other purchases, and with the Payroll Division in Finance regarding staff payroll issues. There is contact with the Regulatory Services Department to coordinate data, taxpayer questions, and on licensing issues. The position works with 311 on the development of efficient scripts and the knowledge base to allow efficient handling of incoming calls. It works with the Communications Department to develop public notices. There is contact with the Human Resources Department as necessary regarding new employee intake, disciplinary actions, and other employee relations issues.

The position will have occasional contact with union representatives regarding employee activities and labor contract related issues.

The job will work with Council Members to assist with constituents concerns and questions. Outside of the City the position works with real estate brokers, appraisers, and other professionals regarding sales and appraisal information. It works with other jurisdiction assessors to exchange information regarding real estate trend data and reports, sales, appraisal analysis, classification, and exemption policy and procedures. The position deals with the Minnesota Department of Revenue (MN DOR) representatives to finalize sales verifications for statutory ratio studies, and confer regarding changes in the statutes which control assessment processes. It also works the United States Census Bureau as a Liaison for Minneapolis census data and reporting.

The relationships responsibility of the position is unchanged from those identified in the 2006 review of the position. The rating of **65 points** will be assigned. Jobs at this level are responsible for creating and maintaining effective relationships that are essential to the success of the job function and that require the use of tact and diplomacy in dealing with departments, agencies and constituents on matters that could result in potential lawsuits, have large financial impact, or where the main object will be to achieve successful outcomes for the Department's financial operations, or where communications are closely scrutinized, are highly visible and have the potential of harming the City's image.

WORKING CONDITIONS

The position works in normal office setting with exposure to computer and keyboarding equipment and other typical office equipment. A rating **20 points** is appropriate and will be assigned.

EFFORT

The position entails mental effort in handling all technology issues for the Assessor's Office in a volatile real estate market. There are deadline pressures associated with tax court and the annual assessment schedule. The position is under pressure to deal with lawsuits against the Department. Answering inquiries from the Mayor and Council members adds to the stress and pressure in the job. Managing consultants and dealing with new legislation adds to the mental effort in the position. There is mental effort in administering the union contracts and dealing with employee grievances. The position plays a major part in preparing for and delivering information at Results Minneapolis Meetings.

A rating of **55 points** will be assigned. Jobs at this level are typically higher level professional and technical positions faced with continual deadlines, time pressure, and a need to pay strict attention to detail, resulting in significant mental effort. Deadlines are crucial and work often must be performed in a constrained time window. These jobs often require significant time using a computer keyboard and mouse, reading detailed and technical material, documentation, and related detail content, which causes eye-strain and other fatigue. There is often considerable mental effort and pressure associated with prioritizing and dealing with competing priorities.

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.**

The position will report to the Director Assessments

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

The position will be a part of the City Assessor's 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.**

The position includes responsibilities to develop, interpret, and implement policy and procedure in the City Assessor's Office including leading the development and implementation of department-wide computerized mass appraisal system. It is responsible for supporting executive level decision making by providing

recommendations and input into strategic planning and Departmental policy design. It provides budgetary analysis for senior management to assist their decision making.

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

Although the position does require a level of expertise in the real estate, property tax, and appraisal field, combined high level technical and computer skills, it exists to provide leadership and direction in the computerized mass appraisal real estate properties, and in the response to litigation and appeals, and supervisory, management, communication, and leadership skills are of significance, as opposed to continuity in the job.

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.

The position will require a close working relationship with the City Assessor and Director Assessment for technology policy and issues, policy development and implementation, which is in alignment with City direction. It will be ultimately accountable to the City Assessor, the Mayor, and City Council

RECOMMENDATION:

Establish the position as Manager Assessment Services, (Appointed Grade 12, 558 Points)

CLASSIFICATION FACTOR WORKSHEET								
Benchmark Classifications	Factors						Total Points	Grade Level
	1	2	3	4	5	6		
Manager Assessment Services (Current)	65	65	10	65	20	55	563	12
PROPOSED CLASSIFICATION								
Manager Assessment Services	65	65	5	65	20	55	558	12

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

