



Rebecca Grill
City Administrator
City Administration Office
414.302.8294
rgrill@westalliswi.gov

MEMORANDUM

TO: Administration & Finance Committee
FROM: Rebecca Grill, City Administrator *RG*
RE: Department Request to Fill Vacant Position
DATE: September 27, 2017

Attached is Jason William's request to fill the vacant position of Administrative Support Assistant in the Assessor's Office.

According to our continuing procedure, these requests are formally referred to the Administration & Finance Committee for consideration through its normal Council/Committee referral process.

If you have any questions concerning this request, please contact me.

RG:jfw
cc: Mayor
HR Dept.
Jason Williams

ADM\Vacpos\VACPOSREQ Assr ASA.100317



City Assessor's Office
414.302.8230
assessor@westalliswi.gov

Memorandum

To: Rebecca Grill, City Administrator
From: Jason Williams, City Assessor
Date: 9/22/2017
Re: Request to Fill Vacant Position

This memorandum respectfully requests permission to fill a vacancy in the Assessor's Office. The position of Administrative Support Assistant became vacant on September 8, 2017 when the incumbent accepted an internal job transfer to the Building Inspection and Neighborhood Services Department.

Please find attached a Request to Fill Position Form, a Job Description Questionnaire (JDQ), and job descriptions for the retired titles of Assessment Clerk I and II. I am available to answer any questions relative to the need to fill this position.

Respectfully,

Jason M. Williams
City Assessor



Request to Fill Position

Submit this form, a memorandum and current position description to the City Administrator for review and submittal to the Administration and Finance Committee. To ensure adequate time for review, submit the Friday prior to the Council Agenda Deadline day.

Department/Division: Assessor Position Title: Administrative Support Assistant
 Reason for Request: New Position OR Replacement to Staff - Date of Vacancy: 09 / 08 /2017
 Person Replaced: Katie Soderlund
 Position Status: Full-time Part-time AND Regular Temporary Provisional Special Other
 If other than Full-time or Regular, indicate work schedule (hours per week, days to be worked, etc.) and anticipated duration of employment: _____
 Funding Source: Operating Grant Other: _____
 Anticipated Date for Filling Position: asap / ____ /20 ____

Is the position required for fiduciary, legal or compliance requirements? No Yes, describe: _____

Why is it necessary that this position be filled? What operational needs does this position fulfill? _____
Assistance with annual assessment requirements and revaluation to meet WI Dept. of Revenue and WI Statute Chapter 70 standards.

What will be the impacts on service functions to the public if the position is not filled? _____
Decreased customer service to residents and taxpayers. Annual assessment work will be delayed or not completed.

What will be the impacts on service to city staff if the position is not filled? _____
Position works routinely and directly with Finance, Treasurer, Water, BINS, IT in providing multiple streams of data, including property address update, ownership information, parcel data, property/assessment data, etc.

What reorganization possibilities have been considered, such as elimination of the position or combining duties with other existing positions? (If none, provide rationale.) _____
None. This position is crucial to the operation of the assessment office.

How has this vacancy/need been covered so far? _____
Some of the work has been completed by the City Assessor, or not done at all.

How many other similar positions exist in this department? None.

Requestor Information

Please Print: Jason Williams City Assessor Assessor
 Name Title Department
 Signature/Date: _____ 09 / 22 / 2017

Attached: Memorandum Current Position Description

Job Description Questionnaire

The purpose of the Job Description Questionnaire (JDQ) is to provide the information necessary to evaluate jobs for salary placement, classify jobs for various legal requirements, and to compile appropriate job descriptions.

Please read this JDQ carefully before answering any of the questions and then complete it as accurately, completely, and briefly as possible. While it is not necessary to describe each duty in great detail, it is important to provide sufficient information so the job can be accurately evaluated and classified. Keep in mind that *the purpose of the JDQ is to collect information about the job and is not designed to evaluate employee performance.*

Consider the typical responsibilities of the job; even those that might only occur cyclically (e.g. annually, quarterly, etc.). The responses should be based on duties and responsibilities that are part of the job under typical conditions, not special projects or temporary assignments. Further, unless specifically directed by management, describe the job as it is today, not as you believe it should be or what it might be in the future.

SECTION 1		DEMOGRAPHIC INFORMATION	
Employee Name	Vacant	Employer Name	City of West Allis
Job Title	Administrative Support Assistant	Work Location	City Hall
Department	Assessor's Office	Division	
Full-Time / Part-Time	Full Time	Part-Time (Hrs per Wk)	
Supervisor Name	Jason M. Williams	Supervisor Title	City Assessor

SECTION 2

DESCRIPTION OF ESSENTIAL DUTIES AND RESPONSIBILITIES

Identify the essential duties / responsibilities of your job, which should be the most important aspects of the job. This section is focused on WHAT is done rather than HOW it is done. Use wording that will provide as clear an understanding as possible for someone not familiar with your work. Avoid terminology or acronyms that are not widely known outside of your line of work. Please list those duties that you feel are most important at the top of the list, and list the estimated percentage of the total annual time that each item takes. *(Remember, as a rule-of-thumb, that 10% equates to roughly 200 hours of a work year.)* To the extent possible, try to identify those duties and responsibilities that account for as close to 100% of your work time as possible. While catch-all categories are acceptable (e.g. misc. duties, other duties as assigned, etc.), those sections will likely NOT be evaluated.

Frequency Codes: Daily [D] / Weekly [W] / Bi-Weekly [B] / Monthly [M] / Quarterly [Q] / Annually [A] / As Needed [N]

Primary Duties	Frequency	% of Annual Total Time
Measure and list land and improvements	N	2%
Calculate building cost data from information contained on property record cards	N	2%
Posting maps, plats, and charts for a property appraiser or assessor	N	2%
Collect data pertaining to construction costs, municipal boundaries, and other information for an appraiser or assessor	N	2%
Accompany and assist an appraiser or assessor in making physical inventories of all types of real and personal property	N	2%
Verify property descriptions on real estate transfer returns by checking records of the county	M	2%
Classify real property according to use	N	2%
Receive, process, and distribute sales data and permits from multiple sources	M	5%
Process property sales, which includes but is not limited to verifying legal descriptions and other characteristics or facts of the sale and ownership chain of title. Download sales data into assessment software, verify accuracy of information, update property ownership data, and send all sale letters. Attached transfer returns and MLS sheets in Market Drive.	M	5%
Process building permits, which includes but is not limited to downloading permit information into assessment software, verifying accuracy of information downloaded, attaching building permits, and compiling list of permits. Enter and attach building permits in Market Drive.	M	5%
Process real estate mailing address changes; determine correct info to enter into Assr software; enter data.	W	5%
Process property address changes into Assessor and Finance software	N	2%
Schedule appointments for all sales and permits	D	5%
Receive, process and distribute mail	D	2%

Answer and respond to inquiries via phone, voicemail, e-mail, hard-copy communication and in person	D	2%
Monitor and order office supplies	M	2%
Pay department bills and request work orders	M	2%
Publish sale reports to the City's website	W	2%
Process parcel splits and combinations; includes updating, entering and scanning changes into Assr and Fin software	A	5%
Maintain and order updated plat page maps for distribution to multiple departments	A	2%
Prepare, maintain and process parcels that change property classification; then enter into Assr and Fin software	A	2%
Process many different types of recorded conveyance documents; includes easements, resolutions, affidavits etc	M	2%
Prepare and maintain list of properties requesting a review of their property assessment. Assist appraisers and City Assessor in collecting pertinent information relative to tax appeals and Board of Review cases.	N	2%
Compile and distribute annual reports; Largest Taxpayer Report, Milw Metro Sewerage Distr Report, assessment summary for Board of Review; Parcel splits and combinations; Property classification changes	A	4%
Review certified survey maps and draw lot line changes on plat map	N	2%
Prepare list of Manufacturing and Telco permits; then send to WI Dept of Revenue	A	2%
Enter annual department budget	A	1%
Assist in tax bill preparation; includes determining and updating fire inspection fees, verifying that ownership and mailing addresses exported correctly and reviewing tax bill proofs	A	1%
Assist Assessor and/or appraisers in annual reports and notices and preparing annual assessment roll	A	2%
Export assessor information; then upload it into Tax software	A	2%
Contact person to investigate/correct/modify data issues	N	3%
Prepare and mail Tax Exemption forms for bi-annual mailing; then compile report from returned forms	A	2%
For citywide revaluation responsible for updating and ordering forms and supplies; coordinate with many departments for mailing assessment notices to all 19,000+ parcels	N	2%
Update department forms and templates as needed	N	2%
Process monthly mobile home reports, permits, and sales. Send annual mobile home lottery credit forms, send annual mobile home value notices.	M	2%
Run assessor reports within assessor software; some weekly, some yearly	N	2%
Enter Personal Property Form data into Market Drive, print cover page to attach to returns. , , send annual Personal Property forms, send annual Real Estate Assessment notices	A	1%
Enter Manufacturing Values into Market Drive	N	1%

Scan and attach documents in Market Drive.	N	1%
Other duties as assigned	N	6%

SECTION 3

TOOLS AND TECHNOLOGY

Identify any software, technology, equipment or machinery utilized on a regular basis in order to perform the functions of the job:

Market Drive (Assessment software); GeoWeb Parcel Viewer WebApp (GIS); NCSS (statistical analysis) Laredo (Milwaukee County document database); Apex (sketching software); GIS Webmap (Property information look-up); Microsoft Office (Word, Excel, Outlook, PowerPoint); CivicPlus (Website management); HTE (Land management and Finance software); GCS (Property assessment and Tax software); Adobe Acrobat DC and PDF Sam (PDF software); NovaTime (Timesheet software); Fortis (Scanning software); MLS – Multiple Listing Service (Realtor’s Listing software); Computer; Multi-line telephone; Printer/Copy/Fax machine; Scanner; Calculator; camera (and photo editing software)

SECTION 4

JUDGMENTS / DECISION-MAKING

Identify at least five of the most typical judgments/decisions that you make in performing your job as well as the solutions to these problems. Please also describe the resource, input or guidance others provide in arriving at your decision and who reviews, if anyone.

Typical Problems / Challenges	Possible Solution(s) to Problem / Challenge	Resources Available and/or Used	Job Title of Who Reviews
Determine correct ownership information to enter into assessor software	Use our contact person at Milwaukee County for assistance	Milwaukee County Register of Deeds	None
Determine correct owner mailing address	Contact owner to verify	Phone call or letter to owner	None
Complicated parcel splits	Ask for clarification	City Assessor, Planning or Engineering offices	None
Computer issues	Ask for assistance	IT Dept, co-workers and/or internet	None
Dealing with an irate citizen	Determine what if anything I can do to address the situation	Co-workers and know assessment laws and practices; office policy	City Assessor

SECTION 5

WORKING RELATIONSHIPS / INTERACTIONS / CONTACTS

Please identify your typical work relationships with other persons inside or outside of your own organization.		
Title of Individuals With Whom You Typically Interact	Describe the Interaction	Why Was It Necessary?
City Assessor	Provide administrative and technical support	Assist City Assessor with tasks, duties and projects as assigned and needed
Office Appraisers/Contractors	Provide administrative and technical support	Assist staff with tasks, duties, and projects as assigned and needed
Other city employees	Provide property data	Many departments use the property data our office has and our work is tied to other departments
County Employees	Parcel and ownership verification	Clarify parcel changes and recorded document information
State Employees	Manufacturing parcel information	Clarify class changes, provide building permits, gather and collect pertinent information from DOR.
Public	Customer service	Provide any necessary information they may need

SECTION 6			
Please indicate the type of responsibility you have as it pertains to leading others.			
	Area of Action / Responsibility	Yes	No
Screen / Interview Applicants			Provides Input
Hire / Promote Employees			X
Provide Written/Verbal Warnings			X
Suspend Employees			X
Terminate Employees			X
Prepare Work Schedules For Others			X
Project Management			X
Provide Work Direction For Others			X
Evaluate Performance Of Others			X
Counsel Employees			X

Train Employees (As Part Of The Normal Duties Of The Job)			X
Approve Overtime			X
Approve Time Off Request For Others			X
Develop / Implement Policies			X
Do you <u>directly</u> supervise any employees? <i>If yes, please list the number of FTEs and job titles of those employees below:</i>			X
Job Title		# of FTEs	n/a

SECTION 7

WORK ENVIRONMENT / PHYSICAL REQUIREMENTS

Please indicate the amount of time typically spent in the following categories.

Physical Requirements	[Place an "X" in the appropriate cells]			
	N/A	Rarely	Occasionally	Frequently
Carrying/Lifting 10 - 40 Pounds			X	
Carrying/Lifting > 40 Pounds		X		
Sitting				X
Standing / Walking / Climbing			X	
Squatting/Crouching/Kneeling/Bending			X	
Pushing / Pulling / Reaching Above Shoulder			X	
Work Environment	N/A	Rarely	Occasionally	Frequently
Indoor/Office Work Environment				X
Noise >85dB (e.g. mower, heavy traffic, milling machine, etc.)		X		
Extreme Hot/Cold Temperatures (>90 degrees / <40 degrees)		X		
Outdoor Weather Conditions			X	

Hazardous Fumes or Odors / Toxic Chemicals		X		
Confined Spaces (as identified by OSHA)		X		
Close Proximity to Moving Machinery / Equipment			X	
Bodily Fluids / Communicable Diseases		X		
Working Alongside Moving Traffic on Roads				X
Electrical Hazards		X		

SECTION 8 **ADDITIONAL EMPLOYEE COMMENTS**

Please identify any other information that would help someone else understand your job more clearly:

Most tasks are done under direct supervision of City Assessor with some tasks done independently without direction from the City Assessor. Knowledge of Assessment Laws and Practices are required as well as knowledge of real estate fundamentals, real estate appraisal practice and procedures. State certification at a minimum level of Assessment Technician by the Wisconsin Department of Revenue is required.

TO BE COMPLETED BY THE EMPLOYEE'S SUPERVISOR

SECTION 9

SUPERVISOR INFORMATION

Supervisor Name	Jason M. Williams	Supervisor Title	City Assessor
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SECTION 10

EDUCATION REQUIRED FOR HIRE

Level of Education (Select one with an "X")	Field(s) of Study
Less than High School Education	n/a
High School Education (or Equivalent)	
One Year Certificate (or Equivalent)	
X Associate's Degree (or Equivalent)	Real estate, property assessment, business, accounting, finance, geography, urban planning, property management, real estate brokerage/sales.
Bachelor's Degree	
Master's Degree	
Professional Degree (Law, Medicine, etc.)	
PhD w/ Dissertation	
Other:	

Provide Any Additional Information Regarding the Required Education (e.g. preferred vs. required, specific coursework, etc.):

SECTION 11

TOTAL EXPERIENCE REQUIRED UPON HIRE

[Place an "X" in the appropriate cells]							
No Experience	< 2 yr.	2 to 3 yrs.	4 to 5 yrs.	6 to 7 yrs.	8 to 9 yrs.	10 to 11 yrs.	≥ 12 yrs.
	X						

Describe Specific Experience Required for Hiring (e.g. 5 total years of customer service experience 2 of which were in a supervisory capacity):

Supplemented by commercial coursework or 2 years as Assessment Clerk 1, Type 45 words per minute

SECTION 12**CERTIFICATION / LICENSURE / TRAINING TO PERFORM JOB**

List Required Certification/Licensure/Training	How Attained/Provided	Required Upon Hire?	May Obtain After Hire?
Assessment Technician	Dept. of Revenue	No	6 months, with possible extension(s)
Valid Wisconsin driver's license	Dept. of Transportation	Yes	
Continuing education to maintain DOR certification	DOR, appraisal/assessment coursework, CVMIC training	n/a	5-year cycle
Describe any current practices as it relates to licensure or certification (e.g. extra pay for certification, employer payment for obtaining or renewing, etc.):			
Department will pay for renewal of DOR certification			

SECTION 13**SUPERVISOR'S COMMENTS / CORRECTIONS / ADDITIONS**

In lieu of altering an employee's JDQ, please provide any corrections, clarifications, or additional information in the space provided below.

JDQ Section	Comment / Clarification / Addition

TO BE COMPLETED BY ADMINISTRATIVE DESIGNEE

SECTION 14		SUPERVISOR INFORMATION
Administrative Designee Name	Administrative Designee Title	

SECTION 15	
<p>In lieu of altering an employee's JDQ, please provide any corrections, clarifications, or additional information in the space provided below.</p>	
JDQ Section	Comment / Clarification / Addition

ASSESSMENT CLERK I

JOB SUMMARY: This is responsible and specialized clerical work in relation to assessment recordkeeping.

NATURE OF THE WORK: An employee in this classification is responsible for the performance of specialized and complex clerical work requiring the application of knowledge gained through considerable experience in the performance of duties. Work requires considerable attention to a wide variety of detail and an employee in this classification may serve as the final check on various transactions. Problems involving departure from a standard policy or procedure are reviewed with a supervisor for a final decision. Work assignments are received in the form of suggestions or general outlines, and employees generally develop and refine their own routine and are required to carry their work to completion.

EXAMPLES OF DUTIES: Typical duties include: assists in processing all recorded conveyances and mortgages; records and processes transfer fee forms; assists in processing and recording permit information on data cards and prepares listings by data cards and prepares listings by date and key numbers; performs data entry relative to various data bases on personal computer and mainframe operations; assists in maintaining platbook updates for accuracy; assists in compiling data for various reports; maintains records and types letters, forms, reports, articles and other material from copy, rough draft or transcription equipment; provides information on plat descriptions, ownership, addresses and code numbers as requested by City departments, surveyors, realtors and the public; reviews the Department of Revenue industrial real estate roll for accuracy in ownership, legal description, key number and area; reviews data processing printout for accuracy and oversees proper filing in property file; composes correspondence in accordance with standards policies; operates duplicating, calculating, word processing and other modern office equipment; processes incoming mail; performs other duties as assigned.

DESIRABLE KNOWLEDGE, SKILLS AND ABILITIES:

Some knowledge of the principles, practices and techniques of real and personal property valuation; some knowledge of the state laws and municipal ordinances governing the assessment and collection of taxes; some knowledge of departmental programs, operations, and policies; good knowledge of modern office procedures and equipment; ability to read, verify and interpret property records and legal property descriptions; ability to make simple mathematical calculations quickly and accurately; ability to perform word processing, ability to perform varied and complex clerical tasks; ability to maintain accurate and complete records and to prepare clear and concise reports; ability to establish and maintain effective working relationships with taxpayers, city officials and other employees.

MINIMUM TRAINING AND EXPERIENCE:

High school graduate/equivalent including or supplemented by commercial coursework; two years of recent clerical work experience in an appraisal or real estate setting; ability to type from copy at a minimum rate of 45 words per minute; Wisconsin Department of Revenue Assessment Technician Level Certification within six months of appointment.

Revised 8/93

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ASSESSMENT CLERK II

JOB SUMMARY: This is difficult and specialized clerical work in relation to assessment recordkeeping.

NATURE OF THE WORK: An employee in this classification is responsible for the performance of specialized and complex clerical work requiring the application of knowledge gained through considerable experience in the performance of duties. Work requires considerable attention to a wide variety of detail and employee in this classification may serve as the final check on various transactions. Problems involving departure from a standard policy or procedure are reviewed with a supervisor for a final decision. Work assignments are received in the form of suggestions or general outlines, and employees generally develop and refine their own routine and are required to carry their work to completion. Supervision may be exercised over a small clerical staff doing specialized work.

EXAMPLES OF DUTIES: Typical duties include: maintains platbook updates and clerk's survey maps for accuracy; assists in compiling data for various reports; processes all recorded conveyances and mortgages; records, leases, judgments, affidavits, easements and disclaimers and processes transfer fee forms; processes and records permit information on data cards and prepares listings by data cards and prepares listings by date and key numbers; performs data entry relative to various data bases on personal computer and mainframe operations; maintains records and types letters, forms, reports, articles and other material from copy, rough draft or transcription equipment; assists in the supervision of duties of subordinate personnel; keeps time and attendance records for department; provides information on plat descriptions, ownership, addresses and code numbers as requested by City departments, surveyors, realtors and the public; reviews the Department of Revenue industrial real estate roll for accuracy in ownership, legal description, key number and area; reviews data processing printout for accuracy and oversees proper filing in property file; composes correspondence in accordance with standards policies; operates duplicating, calculating, word processing and other modern office equipment; processes incoming mail; maintains an inventory of office supplies, materials and equipment; performs other duties as assigned.

DESIRABLE KNOWLEDGE, SKILLS AND ABILITIES:

Some knowledge of the principles, practices and techniques of real and personal property valuation; some knowledge of the state laws and municipal ordinances governing the assessment and collection of taxes; considerable knowledge of departmental programs, operations, and policies; considerable knowledge of modern office procedures and equipment; ability to read, verify and interpret property records and legal property descriptions; ability to make simple mathematical calculations quickly and accurately; ability to perform word processing, ability to perform varied and complex clerical tasks; ability to maintain accurate and complete records and to prepare clear and concise reports; ability to establish and maintain effective working

relationships with taxpayers, city officials and other employees.

MINIMUM TRAINING AND EXPERIENCE:

High school graduate/equivalent including or supplemented by commercial coursework; two years as Assessment Clerk I; ability to type from copy at a minimum rate of 45 words per minute; Wisconsin Department of Revenue Assessment Technician Level Certification.

August, 1993

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