

Civil Service Commission

San Luis Obispo County Civil Service Commission
Regular Session Meeting
Wednesday, April 27, 2011 @ 9:00 A.M.
1055 Monterey Street, Suite D-271 San Luis Obispo, CA



AGENDA

MEMBERS OF THE COMMISSION
Jeannie Nix, President
Bill Tappan, Vice President
Robert Bergman
Jay Salter
Arthur Chapman

1. **Call to Order / Flag Salute / Roll Call**
2. **Public Comment Period**
Members of the public wishing to address the Civil Service Commission on matters other than those scheduled below may do so when recognized by the President. Presentations are limited to three minutes per individual.
3. **Minutes**
The following minutes are submitted for approval:
 - a. March 23, 2011 – Regular
4. **Reports**
 - a. Commission President
 - b. Commission Subcommittees
 - c. Commission Counsel
 - d. Commission Secretary
 - (1) Commission Calendar
 - Request additional hearing date for Appeal No. A10-005
 - (2) Update on County Budget/ Potential Layoffs
5. **Job Class Specifications – Revised**
 - a. Assessment Technician Supervisor
 - b. Assessment Technician I, II, III, IV
6. **Closed Session (per Government Code Section 54957.6):** Conference with Civil Service Commission rules negotiator (Shane Stark) regarding 2010-2011 Civil Service Commission rules update.
7. **Closed Session (per Government Code Section 54957):** Deliberation of Findings and Decision on remand from trial court, Jeremy Nisse v. County of San Luis Obispo and its Civil Service Commission, San Luis Obispo Superior Court, Case No. CV 10-0255 (Civil Service Commission Appeal No. A09-05)
8. **Adjournment**

Civil Service Commission

1055 MONTEREY STREET, SUITE D250 ♦ SAN LUIS OBISPO, CALIFORNIA 93408 ♦ 805.781.5959

The San Luis Obispo County Civil Service Commission
Regular Session Meeting
Wednesday, March 23, 2011 @ 9:00 A.M.
1055 Monterey Street, Suite D-271, San Luis Obispo, CA



MINUTES

MEMBERS OF THE COMMISSION
Jeannie Nix, President
Bill Tappan, Vice President
Robert Bergman
Jay Salter
Arthur Chapman

Present: President Jeannie Nix, Commissioner Art Chapman, Commissioner Robert Bergman, Commissioner Bill Tappan, Commissioner Jay Salter

Staff: Commission Secretary Tami Douglas-Schatz, Commission Clerk Robin Mason

Counsel: Deputy County Counsel Shannon Matuszewicz, Commission Counsel/ Rules Negotiator Stephen Shane Stark

1. **Call to Order/ Flag Salute/ Roll Call**
President Nix called the meeting to order at 9:00 A.M. and led the flag salute. The Civil Service Commission
2. **Public Comment Period**
Members of the public wishing to address the Civil Service Commission on matters other than those scheduled below may do so when recognized by the President. Presentations are limited to three minutes per individual. Being none, President Nix closed the public comment period.
3. **Minutes**
February 23, 2011 Regular Meeting
A motion was made by Commissioner Chapman and seconded by Commissioner Bergman to approve the February 23, 2011 minutes as presented; motion carried 5-0-0
4. **Reports**
Commission President
No report.
Commission Subcommittees
No report.
Commission Counsel
No report.
Commission Secretary
Commission Calendar
Ms. Douglas-Schatz requested dates for the three upcoming hearings and stated that two of the three employees are represented by outside counsel; the third employee was a General Services Agency employee and is represented by SLOCEA.

3-A

Civil Service Commission

Commission Calendar, Continued

General Services Termination Appeal hearing – Ms. Douglas-Schatz referred to Personnel Analyst, Mark McKibben, who stated that both parties had agreed that only one full hearing day, would be required for this hearing. Based on available dates of appellant, respondent, counsel and members of the Commission, the hearing was scheduled for May 11, 2011 at 9:00 A.M.

Library Termination Appeal hearing – Ms. Douglas-Schatz requested two days for this hearing. Commissioner Salter stated that he will not be available May through the end of July. Based on available dates of the parties, counsel and members of the Commission, the hearing was scheduled for June 2nd and 7th, 2011 at 9:00 A.M. Commissioner Tappan stated that he thought he would be available for these hearing dates but could not be certain.

Sheriff-Coroner Department Termination Appeal hearing – Ms. Douglas-Schatz requested three days for this hearing and added that the Appellant's Counsel requested July or August dates due to her tentative court dates in May on unrelated matters. Based on available dates of all parties, the hearing was scheduled for July 27th and 28th, 2011 at 9:00 A.M; the third day is to be determined at that time.

Commissioner Bergman addressed Ms. Douglas-Schatz, explaining that based on previous instances, all parties need be present on their scheduled dates or they will have to forfeit.

Update on County Budget/ Potential Layoffs

President Nix referred to Ms. Douglas-Schatz for the next item on the agenda, under the Commission Secretary's Report. Ms. Douglas-Schatz skipped to Item 4d(3) of the agenda, and stated that the Administrative Office is still working with Department Heads and will have more information regarding the update on the County Budget and potential layoffs during the April 27, 2011 Regular CSC Meeting.

Employee University Presentation

Ms. Douglas-Schatz described the development process of the Employee University Advisory Committee over the past three years, and then introduced the Employee University Manager, Heather Gunderlock.

Ms. Gunderlock addressed the Commissioners and introduced the new and improved EU Intranet website which allows employees to register for classes directly from the website, allowing for ease of access. Ms. Gunderlock explained that the County has partnered with the County of Santa Barbara's Employee University at a reasonable cost. Ms. Douglas-Schatz stated that, despite these downtimes, the Board of Supervisors has continued to invest in the County employees; Commissioner Chapman commented that this is a revolutionary idea. All of the Commissioners expressed their support for the program and offered suggestions for enhancing partnerships and tapping into revenue sources. Ms. Douglas Schatz added that contract work is being done now with APCD and RTA and they are willing to participate in EU which will also offer in-house training developed and modified for countywide use by Janette Pell, General Services Agency Director. Ms. Douglas-Schatz expressed her appreciation to General Services for their recent Performance Evaluation Training in which Commissioner Chapman participated as a panel member and then thanked Heather for her EU presentation.

5. Job Class Specifications – New

President Nix stated that Item 5 was removed from the agenda on March 22, 2011, but asked if anyone wished to comment. Ms. Douglas-Schatz explained that the reclassification had begun prior to Sheriff Parkinson taking office and that the department needed to restructure as a State Certified Forensic Lab. Therefore, the Human Resources Department has tabled the item at Sheriff Parkinson's request. President Nix stated her observation that on the Job Spec Organizational Chart was outdated and that it is difficult to tell where the position would fit afterward, compared to where it resides now.

Civil Service Commission

6. Closed Session (per Gov. Code, 54957.6):

Conference with Commission rules negotiator regarding 2010-2011 Civil Service Commission rules update. The Commission adjourned into closed session at 9:44 A.M. to discuss the rule update with their negotiator. Upon reconvening into open session, President Nix reported that direction was given to counsel; no action was taken.

7. Adjournment

Being no further business, the meeting was adjourned at 11.33 A.M.

** Note: These minutes reflect official action of the Civil Service Commission. A digital record exists and will remain as the official, complete record of all proceedings by the Civil Service Commission.*

DRAFT



Human Resources Department

SAN LUIS OBISPO COUNTY

Tami Douglas-Schatz,
Director

County Government Center, 1055 Monterey Street • Ste. D-250, San Luis Obispo, CA 93408

• Telephone: 805.781.5959 • Fax: 805.781.1044 • Email: hr@co.slo.ca.us

TO: Civil Service Commission

DATE: April 27, 2011

FROM: Emily Dabner-Rutter, Personnel Analyst
Ken Tasseff, Personnel Analyst

SUBJECT: Revised Specifications: Assessment Technician Supervisor and Assessment Technician I, II, III & IV

RECOMMENDATION: It is recommended that the Commission approve the revised Assessment Technician I, II, III & IV and Assessment Technician Supervisor job specifications as proposed.

DISCUSSION:

As part of the ongoing Specification Update Program and at the request of the Assessor's Office, Human Resources is proposing revisions to the Assessment Technician I, II, III & IV job specification and the Assessment Technician Supervisor job specification. The last update to these specifications was in April of 1998.

These specification updates are driven by three main objectives. 1) Update minimum qualifications to more accurately describe qualifications for applicants from outside of the series as well as adding substitution options for education. 2) Update the representative duties, knowledge and skills sections to reflect the most current processes and standards in the Assessor's office and in the field of property assessment. 3) Combine the Assessment Technician I, II, III & IV specifications into a single, consistent and comprehensive specification. Currently the Assessment Technician series is broken into four distinct specifications; Assessment Technician I, Assessment Technician II, Assessment Technician III, and Assessment Technician IV. This revision combines these four separate specifications into one unified specification. There were no changes to the Assessor's Office organizational structure as a result of these specification updates.

Attached are track changes for each of the individual Assessment Technician specifications. The four track changed specs link to a single unified proposed specification (Assessment Technician I, II, III & IV) which is also attached. An organizational chart of the Assessor's Office is also attached.

The department has been involved in the development of these specifications and concurs with the specifications as proposed. SLOCEA and Employee Relations have reviewed and approved the proposed specifications.

1 **HUMAN RESOURCES DEPARTMENT**

2 San Luis Obispo County

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5 **ASSESSMENT TECHNICIAN SUPERVISOR**

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8 **DEFINITION:**

9
10 Under direction of the Assessment Manager, plans, directs, supervises, and evaluates
11 the work of assigned staff in the performance or support of the preparation and
12 maintenance of the assessment roll; performs a variety of complex assessment duties;
13 and does other related work as required.

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16 **REPRESENTATIVE DUTIES:**
17 **(Not in order of importance)**

- 18
- 19 • Supervises, plans, directs, and evaluates the work of assigned staff; coordinates
20 staff work assignments and reviews work to ensure compliance with established
21 laws, policies, standards, and procedures; develops and implements training;
22 mentors staff; recommends disciplinary action when appropriate.
 - 23
 - 24 • Personally performs or directly supervises the most complex assessment enrollment
25 duties.
 - 26
 - 27 • Directs and/or participates in the development and implementation of programs,
28 processes, and policies; may direct and/or participate in the development of new
29 systems to be used in assessment processes.
 - 30
 - 31 • Works with taxpayers and/or their agents to explain assessment practices and
32 procedures.
 - 33
 - 34 • Prepares, reviews, and processes pending revisions to the assessment rolls.
 - 35
 - 36 • May represent the Assessor at various meetings and speaking engagements.
 - 37
 - 38 • Prepares a variety of reports and correspondence; reviews and approves
39 correspondence of assigned staff.
 - 40
 - 41 • May act for the Assessment Manager in his/her absence.
 - 42
 - 43 • Implements County safety programs and ensures employee compliance with all
44 safety rules and regulations; responds to hazard reports; investigates and reports
45 accidents and injuries.
 - 46
 - 47 • Coordinates activities with other sections within the Assessor's office and with other
48 government agencies regarding assessment procedures.

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EMPLOYMENT STANDARDS:

Knowledge of:

- Assessment enrollment principles, methods, policies, procedures, and terminology pertinent to assessment enrollment for ad valorem property taxation
- Provisions of the California State Constitution, Revenue and Taxation Code, and other codes and statutes pertaining to the assessment of property for ad valorem taxation purposes
- Common methods of describing real property
- Assessor's office organization, procedures and standards as well as strategic direction and goals
- Principles of supervision, leadership and training
- Computer software including those applications pertinent to assessment enrollment functions
- Interpersonal skills using tact, patience, and courtesy
- Oral and written communication skills

Ability to:

- Plan, direct, supervise, and evaluate the work of assigned staff
- Perform complex assessment duties
- Interpret, apply, and explain rules, laws, regulations, policies, and procedures
- Establish and maintain consistency of standards and procedures
- Independently analyze problems, prepare sound recommendations, and adopt effective courses of action
- Prepare concise and accurate written and oral reports and correspondence
- Convey clear directions and encourage communication with and among staff
- Support and follow Assessor's office policies, goals, guiding principles, and Mission – Vision - Values Statement

- 96 • Develop, encourage, and maintain positive working relationships; communicate and
97 work effectively with others
- 98
- 99 • Motivate staff to achieve high performance
- 100
- 101 • Operate a computer and assigned office equipment
- 102
- 103 • Maintain a safe and orderly work area
- 104

105
106 **EDUCATION/EXPERIENCE:**

107
108 **Either A:** One year of experience in a position comparable to an Assessment
109 Technician IV; **OR B:** Six (6) years of increasingly responsible experience in a closely
110 related property tax field, two years of which must be at a leadworker level.
111

112
113 **LICENSES/CERTIFICATES:**

114
115 A valid driver's license is required at the time of application. A valid CALIFORNIA driver's
116 license is required at the time of appointment and must be maintained throughout
117 employment.
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119
120 This class specification generally describes the duties and responsibilities characteristic
121 of the position(s) within this class. The duties of a particular position within a multi-
122 position class may vary from the duties of other positions within the class. Accordingly,
123 the essential duties of a particular position (whether it be a multi-position class or a
124 single-position class) will be identified and used by medical examiners and hiring
125 authorities in the selection process. This information will also be made available for
126 review at the time of any recruitment for that position and at such other times as
127 reasonably required.
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129 Adopted: 4/29/98
130 Revised: 04/27/11
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1 **HUMAN RESOURCES DEPARTMENT**

2 San Luis Obispo County

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5 **ASSESSMENT TECHNICIAN SUPERVISOR**

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8 **DEFINITION:**

9
10 Under direction of the Assessment Manager, plans, directs, supervises, and evaluates
11 the work of assigned staff in the performance or support of the preparation and
12 maintenance of the assessment roll; is responsible for the overall planning,
13 organization, direction and coordination of the support or technical staff performs a
14 variety of complex assessment duties; and does other related work as required.

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17 **REPRESENTATIVE DUTIES:**
18 **(Not in order of importance)**

- 19
- 20 • Supervises, plans, directs, and evaluates the work of assigned staff; coordinates
- 21 staff work assignments and reviews work to ensure compliance with established
- 22 laws, policies, standards, and procedures; develops and implements training;
- 23 mentors staff; recommends disciplinary action when appropriate.
- 24 ~~Supervises and reviews the work of assigned support and technical staff to ensure~~
- 25 ~~the efficient preparation and maintenance of the assessment roll; organizes and~~
- 26 ~~monitors workloads; establishes work assignments and priorities; trains~~
- 27 ~~subordinates~~
- 28 • Personally performs or directly supervises the most complex assessment enrollment
- 29 duties.
- 30
- 31 • Directs and/or participates in the development and implementation of programs,
- 32 processes, and policies; may direct and/or participate in the development of new
- 33 systems to be used in assessment processes.
- 34 ~~Develops and writes procedures~~
- 35 • Works with taxpayers and/or their agents to explain assessment practices and
- 36 procedures.
- 37 ~~Works with the Auditor, Tax Collector, and other government agencies regarding~~
- 38 ~~assessment procedures; answers correspondence and inquiries~~
- 39 • Prepares, reviews, and processes pending revisions to the assessment rolls.
- 40 ~~Researches regulations and laws regarding enrollment procedures~~
- 41
- 42 • May represent the Assessor at various meetings and speaking engagements.
- 43
- 44 • Prepares a variety of reports and correspondence; reviews and approves
- 45 correspondence of assigned staff.
- 46 ~~Prepares statistical and narrative reports~~
- 47
- 48 • May act for the Assessment Manager in his/her absence.

- 49
- 50 • Implements County safety programs and ensures employee compliance with all
- 51 safety rules and regulations; responds to hazard reports; investigates and reports
- 52 accidents and injuries.
- 53
- 54 • Coordinates activities with other sections within the Assessor's office and with other
- 55 government agencies regarding assessment procedures.~~Coordinates activities with~~
- 56 ~~other sections within the Assessor's office-~~
- 57
- 58 • ~~Provides input and assistance to the Assessor or other management staff~~
- 59 • ~~Researches regulations and laws regarding enrollment procedures-~~
- 60

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62 **EMPLOYMENT STANDARDS:**

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64 **Knowledge of:**

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- 66 • Assessment enrollment principles, methods, policies, procedures, and terminology
- 67 pertinent to assessment enrollment for ad valorem property taxation
- 68
- 69 ~~Policies, procedures, codes, rules, regulations and documents involved in technical-~~
- 70 ~~enrollment and supplemental assessments~~
- 71 • Provisions of the California State Constitution, Revenue and Taxation Code, and
- 72 other codes and statutes pertaining to the assessment of property for ad valorem
- 73 taxation purposes.
- 74
- 75 ~~California State Revenue and Taxation Codes as they apply to particular assessment and~~
- 76 ~~enrollment problems~~
- 77 • Common methods of describing real property.
- 78
- 79 • Assessor's office organization, procedures and standards as well as strategic
- 80 direction and goals.
- 81
- 82 ~~Assessor's office organization and function~~
- 83 • Principles of supervision, leadership and training.
- 84
- 85 ~~Methods and techniques of supervision~~
- 86 • Computer software including those applications pertinent to assessment enrollment
- 87 functions.
- 88
- 89 ~~Computer functions used in the Assessor's office~~
- 90 • Interpersonal skills using tact, patience, and courtesy.
- 91
- 92 • Oral and written communication skills.
- 93

94 **Ability to:**

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- 96 • Plan, direct, supervise, and evaluate the work of assigned staff

- 97 ~~_____ Prioritize, review, direct, evaluate, and coordinate work assigned to section~~
 98 • Perform complex assessment duties
 99
 100 • Interpret, apply, and explain rules, laws, regulations, policies, and procedures
 101
 102 • Establish and maintain consistency of standards and procedures
 103
 104 • Independently analyze problems, prepare sound recommendations, and adopt
 105 effective courses of action
 106
 107 ~~_____ Analyze complex data and reach accurate and justifiable conclusions; make~~
 108 ~~decisions based on knowledge, data and judgment~~
 109 • Prepare concise and accurate written and oral reports and correspondence
 110
 111 ~~_____ Collect, prepare, and analyze data for statistical and narrative reports~~
 112 • Convey clear directions and encourage communication with and among staff
 113 Communicate clearly, concisely, accurately, and tactfully both in writing and orally
 114 • Support and follow Assessor's office policies, goals, guiding principles, and Mission –
 115 Vision - Values Statement
 116
 117 • Develop, encourage, and maintain positive working relationships; communicate and
 118 work effectively with others
 119
 120 ~~Establish and maintain cooperative working relationships with the public and staff~~
 121 • Motivate staff to achieve high performance
 122
 123 ~~_____ Motivate staff, facilitate projects and address personnel issues using strong~~
 124 ~~leadership skills~~
 125 • Operate a computer and assigned office equipment
 126
 127 • Maintain a safe and orderly work area
 128
 129

130 **EDUCATION/EXPERIENCE:**

131
 132 **Either A:** ~~One~~Two years of experience in a position comparable to an Assessment
 133 Technician IV; **OR B:** ~~Graduation from an accredited institution with a Bachelor's~~
 134 ~~Degree. (Job related experience in an Assessor, Tax Collector, or Recorder's office,~~
 135 ~~title company, or related field may be substituted for the required education on a~~
 136 ~~year for year basis) In addition, 4 Six (6) years of increasingly responsible experience in~~
 137 ~~a closely related property tax field, two years of which must be at a leadworker level.~~
 138 ~~the technical aspects of the Ad Valorem taxation field is required.~~
 139
 140

141 **LICENSES/CERTIFICATES:**

143 A valid driver's license is required at the time of application. A valid CALIFORNIA driver's
144 license is required at the time of appointment and must be maintained throughout
145 employment.

146 ~~Possession of a valid California drivers license is required at the time of application~~
147 ~~and must be maintained throughout employment.~~

148
149 This class specification generally describes the duties and responsibilities characteristic
150 of the position(s) within this class. The duties of a particular position within a multi-
151 position class may vary from the duties of other positions within the class. Accordingly,
152 the essential duties of a particular position (whether it be a multi-position class or a
153 single-position class) will be identified and used by medical examiners and hiring
154 authorities in the selection process. This information will also be made available for
155 review at the time of any recruitment for that position and at such other times as
156 reasonably required.

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Adopted: 4/29/98
Revised: 04/27/11

1 **HUMAN RESOURCES DEPARTMENT IV**

2 San Luis Obispo County

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6 **ASSESSMENT TECHNICIAN I, II, III & IV**

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10 **DEFINITION:**

11 Under the direction of the section supervisor, performs a variety of tax assessment duties to
12 complete and maintain the property tax roll; provides support and service to other office
13 sections and the public; and does other related duties as required.

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15
16 **DISTINGUISHING CHARACTERISTICS:**

17
18 The **Assessment Technician I** classification is the entry level position in the series.
19 Incumbents work under supervision while learning general assessment duties, policies, and
20 procedures.

21
22 The **Assessment Technician II** classification is the journey level position in the series.
23 Incumbents work under general supervision and perform progressively more difficult
24 assessment service duties.

25
26 The **Assessment Technician III** classification is the advanced journey level position.
27 Incumbents work under direction and perform more complex assessment service duties; may
28 assist in training and mentoring staff; may act as a specialist.

29
30 The **Assessment Technician IV** classification is the advanced level position. Incumbents work
31 under direction and perform the most complex assessment duties; may provide work direction
32 and/or coordination for subordinate staff; may act as section leadworker.

33
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35 **REPRESENTATIVE DUTIES:**

36 (Not in order of importance)

- 37
- 38 • Enters, scans, researches, and maintains a large variety and volume of assessment data
 - 39 with a high degree of accuracy.
 - 40
 - 41 • Answers phones and assists the public with general assessment questions.
 - 42
 - 43 • Reads and interprets legal descriptions.
 - 44
 - 45 • Prepares a variety of reports and correspondence.
 - 46
 - 47 • Performs basic cash handling and clerical accounting duties.
 - 48

- 49 • May be called upon to assist or serve on special projects and/or teams.
50

51 **In addition, AT II:**
52

- 53 • Evaluates assessment enrollments and determines appropriate course of action.
54
55 • Interprets and calculates assessment values supplied by an appraiser.
56
57 • Assists/educates staff and the public about various assessment situations in person, by
58 telephone, and through correspondence; explains the application of various Revenue and
59 Taxation Codes, and other codes, statutes, and regulations.
60
61 • Assists in the design, development, and implementation of systems, workflow, procedures
62 and/or policies to be used in the Assessor's office.
63
64 • Prepares and/or processes basic pending revisions to assessment roll.
65
66 • Provides assistance to appraisers and auditor-appraisers with field work/canvassing.
67

68 **In addition, AT III:**
69

- 70 • Assists in training and mentoring subordinate staff.
71
72 • May assist in developing computer programs directly related to assessment projects.
73
74 • Prepares and/or processes corrections to the supplemental roll; prepares and/or processes
75 complex pending revisions to assessment roll.
76
77 • May lead in the development and implementation of procedures to be used in the Assessor's
78 office.
79
80 • May lead in the design, development, and implementation of systems and workflow to be
81 used in the Assessor's office.
82

83 **In addition, AT IV:**
84

- 85 • Acts as section leadworker; distributes work assignments; advises supervisor of operations,
86 staffing and resource needs; provides input on staff performance.
87
88 • When directed, may supervise the section in the absence of the Assessment Tech
89 Supervisor.
90

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92 **EMPLOYMENT STANDARDS:**
93

94 **Knowledge of:**
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- 96 • Oral and written communication skills

- 97
98 • Interpersonal skills using tact, patience, and courtesy
99
100 • Mathematics including fractions and percentages
101
102 • General office procedures, practices, and machines
103
104 • Personal computer usage and common software
105
106 • Common methods of describing real property
107

108 **In addition, AT II:**

- 109
110 • Provisions of the California State Constitution, Revenue and Taxation Code, and other codes
111 and statutes pertaining to the assessment of property for ad valorem taxation purposes
112
113 • Assessor's office organization, procedures, and standards as well as strategic direction and
114 goals
115
116 • Computer applications pertinent to assessment service functions
117

118 **In addition, AT III:**

- 119
120 • Principles of training
121

122 **In addition, AT IV:**

- 123
124 • Principles of leadership and work planning
125

126 **Ability to:**

- 127
128 • Follow written and oral instructions
129
130 • Convey assessment laws and procedures accurately, tactfully, and concisely, both orally and
131 in writing
132
133 • Interpret, apply, and explain rules, laws, regulations, policies and procedures
134
135 • Analyze assessment service problems, prepare sound recommendations, and adopt effective
136 courses of action
137
138 • Perform duties under pressure and with many interruptions while maintaining a balance
139 between accuracy and quantity
140
141 • Use sound judgment in researching, interpreting, applying, and explaining appropriate laws,
142 codes, ordinances, regulations, policies, procedures, and guidelines
143
144 • Read and interpret maps and property descriptions

- 145
146 • Support and follow Assessor's office policies, goals, guiding principles, and Mission – Vision
147 – Values Statement
148
149 • Develop and maintain positive working relationships; communicate and work effectively with
150 others
151
152 • Foster a spirit of teamwork and support when interacting with staff and others
153
154 • Operate a computer and assigned office equipment
155
156 • Maintain a safe and orderly work area
157

158 **In addition, AT II:**

- 159
160 • Compile and/or provide assessment reports
161

162 **In addition, AT III:**

- 163
164 • Train and mentor subordinate staff
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166 • Lead and coordinate special projects
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168 **In addition, AT IV:**

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170 • Lead and coordinate work of subordinate staff
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173 **EDUCATION/EXPERIENCE:**

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175 **All levels:** Graduation from high school or possession of a G.E.D. certificate.
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177 **In addition to the above:**

178
179 **Assessment Technician I:** EITHER A: One (1) year of clerical experience in an Assessor's
180 office, Tax Collector's office, Auditor/Controller's office, Clerk/Recorder's office or similar
181 experience in a real estate related field. OR B: Two (2) years of clerical work which includes
182 computer experience. One (1) year of the required experience in option B may be substituted
183 with two (2) years of coursework (60 semester units or 90 quarter units) at an accredited
184 college or university.
185

186 **Assessment Technician II:** EITHER A: One (1) year of experience in a position comparable
187 to an Assessment Technician I in San Luis Obispo County. OR B: Two (2) years of related
188 experience at the level of Assessment Technician I in an Assessor's office, Tax Collector's office,
189 or Auditor/Controller's office. One (1) year of the required experience in option B may be
190 substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an
191 accredited college or university.
192

193 **Assessment Technician III:** EITHER A: Two (2) years of experience in a position
194 comparable to an Assessment Technician II in San Luis Obispo County. OR B: Three (3) years
195 of related experience at the level of Assessment Technician II in an Assessor's office, Tax
196 Collector's office, or Auditor/Controller's office. One (1) year of the required experience in
197 option B may be substituted with two (2) years of coursework (60 semester units or 90 quarter
198 units) at an accredited college or university.

199
200 **Assessment Technician IV:** EITHER A: Two (2) years of experience in a position comparable
201 to an Assessment Technician III in San Luis Obispo County. OR B: Three (3) years of related
202 experience at the level of Assessment Technician III in an Assessor's office, Tax Collector's
203 office, or Auditor/Controller's office. One (1) year of the required experience in option B may
204 be substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an
205 accredited college or university.

206
207
208 **LICENSES/CERTIFICATES:**
209 A valid driver's license is required at the time of application. A valid **CALIFORNIA** driver's
210 license is required at the time of appointment and must be maintained throughout employment.

211
212 This class specification generally describes the duties and responsibilities characteristic of the
213 position(s) within this class. The duties of a particular position within a multi-position class may
214 vary from the duties of other positions within the class. Accordingly, the essential functions of a
215 particular position (whether it be a multi-position class or a single-position class) will be
216 identified and used by medical examiners and hiring authorities in the selection process.

217
218 Adopted: 4/29/98
219 Revised 04/27/11
220

1 | **HUMAN RESOURCES DEPARTMENT**
2 | San Luis Obispo County

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6 | **ASSESSMENT TECHNICIAN I, II, III & IV**
7 | Originated as AT I

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9
10 | **DEFINITION:**

11 | Under the direction of the section supervisor, performs a variety of tax assessment duties to
12 | complete and maintain the property tax roll routine support assessment functions in support of
13 | the Assessor's staff; provides support and service to other office sections and the public; and
14 | does other related work duties as required.

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17 | **DISTINGUISHING CHARACTERISTICS:**

18
19 | The **Assessment Technician I** classification is the entry level position in the series.
20 | Incumbents work under supervision while learning general assessment duties, policies, and
21 | procedures.

22
23 | The **Assessment Technician II** classification is the journey level position in the series.
24 | Incumbents work under general supervision and perform progressively more difficult
25 | assessment service duties.

26
27 | The **Assessment Technician III** classification is the advanced journey level position.
28 | Incumbents work under direction and perform more complex assessment service duties; may
29 | assist in training and mentoring staff; may act as a specialist.

30
31 | The **Assessment Technician IV** classification is the advanced level position. Incumbents work
32 | under direction and perform the most complex assessment duties; may provide work direction
33 | and/or coordination for subordinate staff; may act as section leadworker.

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36 | **REPRESENTATIVE DUTIES:**

37 | (Not in order of importance)

- 38
39 | • Enters, scans, researches, and maintains a large variety and volume of assessment data
40 | with a high degree of accuracy. Receives and processes public requests for information
41 | obtainable by existing computer programs; researches current assessment information on
42 | the mainframe computer system
- 43
44 | • Answers phones and; assists assessee at the public counter and answers with general
45 | assessment questions.
- 46
47 | • Reads and interprets legal descriptions. assessor's parcel maps
48

- 49 • Prepares a variety of reports Drafts memos and correspondence.
50
51 • Performs basic cash handling and clerical accounting duties. Collects fees and makes change,
52 balances cash drawer; general office typing and filing
53
54 • May be called upon to assist or serve on special projects and/or teams.
55

56 Reads recorded deeds and interprets legal descriptions
57 Maintains assessment records; maintains training records; maintains legislative and cost
58 resources; maintains the office library and Procedures Manual
59 Inputs valuations to the current assessment roll for real and personal property; inputs real and
60 personal property attributes and images; inputs appraisal triggers; inputs costs reported on
61 business property statements; inputs business property account information; updates mailing
62 addresses for supplemental assessments
63 Begins to interpret drafting instructions for parcel cuts
64 Learns to operate personal computers

65 **In addition, AT II:**
66

- 67 • Evaluates assessment enrollments and determines appropriate course of action.
68
69 • Interprets and calculates assessment values supplied by an appraiser.
70
71 • Assists/educates staff and the public about various assessment situations in person, by
72 telephone, and through correspondence; explains the application of various Revenue and
73 Taxation Codes, and other codes, statutes, and regulations.
74
75 • Assists in the design, development, and implementation of systems, workflow, procedures
76 and/or policies to be used in the Assessor's office.
77
78 • Prepares and/or processes basic pending revisions to assessment roll.
79
80 • Provides assistance to appraisers and auditor-appraisers with field work/canvassing.
81

82 **In addition, AT III:**
83

- 84 • Assists in training and mentoring subordinate staff.
85
86 • May assist in developing computer programs directly related to assessment projects.
87
88 • Prepares and/or processes corrections to the supplemental roll; prepares and/or processes
89 complex pending revisions to assessment roll.
90
91 • May lead in the development and implementation of procedures to be used in the Assessor's
92 office.
93
94 • May lead in the design, development, and implementation of systems and workflow to be
95 used in the Assessor's office.
96

97 **In addition, AT IV:**

- 98
- 99 • Acts as section leadworker; distributes work assignments; advises supervisor of operations,
- 100 staffing and resource needs; provides input on staff performance.
- 101
- 102 • When directed, may supervise the section in the absence of the Assessment Tech
- 103 Supervisor.
- 104

105

106 **EMPLOYMENT STANDARDS:**

107

108 **Knowledge of:**

109

- 110 • Oral and written communication skills
- 111
- 112 • Interpersonal skills using tact, patience, and courtesy
- 113
- 114 • Mathematics including fractions and percentages arithmetic
- 115
- 116 • General office procedures, practices, and machines
- 117 clerical techniques; basic assessment practices and office procedures
- 118
- 119 • Personal computer usage and common software
- 120
- 121 • Common methods of describing real property
- 122

123

124 **In addition, AT II:**

125

- 126 • Provisions of the California State Constitution, Revenue and Taxation Code, and other codes
- 127 and statutes pertaining to the assessment of property for ad valorem taxation purposes
- 128
- 129 • Assessor's office organization, procedures, and standards as well as strategic direction and
- 130 goals
- 131
- 132 • Computer applications pertinent to assessment service functions
- 133

134 **In addition, AT III:**

135

- 136 • Principles of training
- 137

138 **In addition, AT IV:**

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- 140 • Principles of leadership and work planning
- 141

142 **Ability to:**

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- 144 • Follow written and oral instructions

- 145
- 146 • Convey assessment laws and procedures accurately, tactfully, and concisely, both orally and
- 147 in writing
- 148
- 149 • Interpret, apply, and explain rules, laws, regulations, policies and procedures
- 150
- 151 • Analyze assessment service problems, prepare sound recommendations, and adopt effective
- 152 courses of action
- 153
- 154 • —
- 155 • Perform duties under pressure and with many interruptions while maintaining a balance
- 156 between accuracy and quantity
- 157
- 158 • Use sound judgment in researching, interpreting, applying, and explaining appropriate laws,
- 159 codes, ordinances, regulations, policies, procedures, and guidelines
- 160
- 161 • Read and interpret maps and property descriptions
- 162
- 163 • Support and follow Assessor's office policies, goals, guiding principles, and Mission – Vision
- 164 – Values Statement
- 165 •
- 166 • DevelopEstablish and maintain positivecooperative working relationships; communicate and
- 167 work effectively with otherswith the public, management, and other employees
- 168
- 169 • Foster a spirit of teamwork and support when interacting with staff and others
- 170
- 171 • Operate a computer and assigned office equipment
- 172
- 173 • Maintain a safe and orderly work area

174 **In addition, AT II:**

- 175
- 176
- 177 • Compile and/or provide assessment reports
- 178

179 **In addition, AT III:**

- 180
- 181 • Train and mentor subordinate staff
- 182
- 183 • Lead and coordinate special projects
- 184

185 **In addition, AT IV:**

- 186
- 187 • Lead and coordinate work of subordinate staff
- 188
- 189

190 **EDUCATION/EXPERIENCE:**

191 **All levels:** Graduation from high school or possession of a G.E.D. certificate.

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In addition to the above:

Assessment Technician I: EITHER A: One (1) year of clerical experience in an Assessor's office, Tax Collector's office, Auditor/Controller's office, Clerk/Recorder's office or similar experience in a real estate related field, title company, mapping position, or an Auditor's/Tax Collector's/Recorder's office. OR B: Two (2) years of clerical work, which includes word processing/personal computer experience. One (1) year of the required experience in option B may be substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an accredited college or university.

Assessment Technician II: EITHER A: One (1) year of experience in a position comparable to an Assessment Technician I in San Luis Obispo County. OR B: Two (2) years of related experience at the level of Assessment Technician I in an Assessor's office, Tax Collector's office, or Auditor/Controller's office. One (1) year of the required experience in option B may be substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an accredited college or university.

Assessment Technician III: EITHER A: Two (2) years of experience in a position comparable to an Assessment Technician II in San Luis Obispo County. OR B: Three (3) years of related experience at the level of Assessment Technician II in an Assessor's office, Tax Collector's office, or Auditor/Controller's office. One (1) year of the required experience in option B may be substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an accredited college or university.

Assessment Technician IV: EITHER A: Two (2) years of experience in a position comparable to an Assessment Technician III in San Luis Obispo County. OR B: Three (3) years of related experience at the level of Assessment Technician III in an Assessor's office, Tax Collector's office, or Auditor/Controller's office. One (1) year of the required experience in option B may be substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an accredited college or university.

LICENSES/CERTIFICATES:

A valid driver's license is required at the time of application. A valid **CALIFORNIA** driver's license is required at the time of appointment and must be maintained throughout employment.

This class specification generally describes the duties and responsibilities characteristic of the position(s) within this class. The duties of a particular position within a multi-position class may vary from the duties of other positions within the class. Accordingly, the essential functions of a particular position (whether it be a multi-position class or a single-position class) will be identified and used by medical examiners and hiring authorities in the selection process.

Adopted: 4/29/98
Revised 04/27/11

1 **HUMAN RESOURCES DEPARTMENT**

2 San Luis Obispo County

6
7 **ASSESSMENT TECHNICIAN I, II, III & IV**

8 Originated as AT II

10
11 **DEFINITION:**

12 Under the direction of the section general supervisor, performs a wide variety of support
13 assessment duties—tax assessment duties to complete and maintain the property tax
14 roll requiring independent judgment and initiative; provides support and service to other office
15 sections and the public; and does other related duties work as required.

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18 **DISTINGUISHING CHARACTERISTICS:**

19
20 The **Assessment Technician I** classification is the entry level position in the series.
21 Incumbents work under supervision while learning general assessment duties, policies, and
22 procedures.

23
24 The **Assessment Technician II** classification is the journey level position in the series.
25 Incumbents work under general supervision and perform progressively more difficult
26 assessment service duties.

27
28 The **Assessment Technician III** classification is the advanced journey level position.
29 Incumbents work under direction and perform more complex assessment service duties; may
30 assist in training and mentoring staff; may act as a specialist.

31
32 The **Assessment Technician IV** classification is the advanced level position. Incumbents work
33 under direction and perform the most complex assessment duties; may provide work direction
34 and/or coordination for subordinate staff; may act as section leadworker.

35
36
37 **REPRESENTATIVE DUTIES:**
38 **(Not in order of importance)**

- 39
40 • Enters, scans, researches, and maintains a large variety and volume of assessment data
41 with a high degree of accuracy.
42 • Inputs valuations for assessments with multiple or complex transactions; inputs revisions to
43 the secured and unsecured rolls; inputs corrections to the supplemental assessment roll;
44 inputs manual supplemental bills
45
46 • Answers phones and assists the public with general assessment questions.
47
48 • Reads and interprets legal descriptions.

- 49 • ~~Interprets assessment records~~
- 50
- 51 • Prepares a variety of reports and correspondence.
- 52 • ~~Writes memos and correspondence~~
- 53
- 54 • Performs basic cash handling and clerical accounting duties.
- 55
- 56 • May be called upon to assist or serve on special projects and/or teams.
- 57
- 58 **In addition, AT II:**
- 59
- 60 • Evaluates assessment enrollments and determines appropriate course of action.
- 61
- 62 • Interprets and calculates assessment values supplied by an appraiser.
- 63
- 64 • Assists/educates staff and the public about various assessment situations in person, by
- 65 telephone, and through correspondence; explains the application of various Revenue and
- 66 Taxation Codes, and other codes, statutes, and regulations.
- 67
- 68 • Assists in the design, development, and implementation of systems, workflow, procedures
- 69 and/or policies to be used in the Assessor's office.
- 70
- 71 • Prepares and/or processes basic pending revisions to assessment roll.
- 72
- 73 • Provides assistance to appraisers and auditor-appraisers with field work/canvassing.
- 74
- 75 • ~~Interprets drafting instructions for parcel cuts~~
- 76 • ~~Operates personal computers to collect data and compiles reports~~
- 77 • ~~Enters and tracks construction exclusions~~
- 78 • ~~Provides support for assessee reporting programs and assessment relief claims~~
- 79 • ~~Works closely with the Auditor Controller's office to maintain correct assessee and mailing~~
- 80 ~~addresses for delinquent filings~~
- 81 • ~~Processes assessment appeal applications~~
- 82 • ~~Utilizes appropriate State laws and codes to determine correct enrollment of assessments~~
- 83 • ~~Receives and processes building permits and related data~~
- 84 • ~~Assists in developing forms to be used by the Assessor's office~~
- 85 • ~~Assists with business property field canvassing and account maintenance~~
- 86
- 87 **In addition, AT III:**
- 88
- 89 • ~~Assists in training, monitoring, and mentoring subordinate~~ staff employees
- 90
- 91 • May assist in developing computer programs directly related to assessment projects.
- 92
- 93 • Prepares and/or processes corrections to the supplemental roll; prepares and/or processes
- 94 complex pending revisions to assessment roll.;
- 95
- 96 • May lead in the development and implementation of procedures to be used in the Assessor's

97 | office.

- 98 |
- 99 | • May lead in the design, development, and implementation of systems and workflow to be
- 100 | used in the Assessor's office.

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102 | **In addition, AT IV:**

- 103 |
- 104 | • Acts as section leadworker; distributes work assignments; advises supervisor of operations,
- 105 | staffing and resource needs; provides input on staff performance.
- 106 |
- 107 | • When directed, may supervise the section in the absence of the Assessment Tech
- 108 | Supervisor.

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111 | **EMPLOYMENT STANDARDS:**

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113 | **Knowledge of:**

- 114 |
- 115 | • Oral and written communication skills
- 116 | • ~~Correct English usage, vocabulary, spelling, punctuation and grammar~~
- 117 |
- 118 | • Interpersonal skills using tact, patience, and courtesy
- 119 |
- 120 | • Mathematics including fractions and percentages
- 121 |
- 122 | • General office procedures, practices, and machines
- 123 |
- 124 | • Personal computer usage and common software
- 125 |
- 126 | • Common methods of describing real property

127 |

128 | **In addition, AT II:**

- 129 |
- 130 | • Provisions of the California State Constitution, Revenue and Taxation Code, and other codes
- 131 | and statutes pertaining to the assessment of property for ad valorem taxation purposes
- 132 |
- 133 | • Assessor's office organization, procedures, and standards as well as strategic direction and
- 134 | goals
- 135 | • ~~Assessment methods, procedures and practices~~
- 136 |
- 137 | • Computer applications pertinent to assessment service functions
- 138 |
- 139 | • ~~Mapping practices and procedures~~
- 140 | • ~~Personal and mainframe computer operations~~

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142 | **In addition, AT III:**

- 143 |
- 144 | • Principles of training

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In addition, AT IV:

- Principles of leadership and work planning

Ability to:

- Follow written and oral instructions
- Convey assessment laws and procedures accurately, tactfully, and concisely, both orally and in writing
- Interpret, apply, and explain rules, laws, regulations, policies and procedures
- Analyze assessment service problems, prepare sound recommendations, and adopt effective courses of action
- Perform duties under pressure and with many interruptions while maintaining a balance between accuracy and quantity
- Use sound judgment in researching, interpreting, applying, and explaining appropriate laws, codes, ordinances, regulations, policies, procedures, and guidelines
- Read and interpret maps and property descriptions
- Support and follow Assessor's office policies, goals, guiding principles, and Mission – Vision – Values Statement
- Develop and maintain positive working relationships; communicate and work effectively with others
- Foster a spirit of teamwork and support when interacting with staff and others
- Operate a computer and assigned office equipment
- Maintain a safe and orderly work area
- ~~Read and interpret maps and property descriptions~~
- ~~Quickly and accurately enter, retrieve, and verify data via computer terminal~~
- ~~Perform tasks involving independent judgment~~
- ~~Make arithmetical computations~~
- ~~Perform duties under pressure and with many interruptions~~
- ~~Establish and maintain cooperative working relationships with the public, management and other employees.~~

In addition, AT II:

- Compile and/or provide assessment reports

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In addition, AT III:

- Train and mentor subordinate staff
- Lead and coordinate special projects

In addition, AT IV:

- Lead and coordinate work of subordinate staff

EDUCATION/EXPERIENCE:

All levels: Graduation from high school or possession of a G.E.D. certificate.

In addition to the above:

Assessment Technician I: EITHER A: One (1) year of clerical experience in an Assessor's office, Tax Collector's office, Auditor/Controller's office, Clerk/Recorder's office or similar experience in a real estate related field. OR B: Two (2) years of clerical work which includes computer experience. One (1) year of the required experience in option B may be substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an accredited college or university.

Assessment Technician II: EITHER A: One (1) year of experience in a position comparable to an Assessment Technician I in San Luis Obispo County. OR B: Two (2) years of related experience at the level of Assessment Technician I in an Assessor's office, Tax Collector's office, or Auditor/Controller's office. One (1) year of the required experience in option B may be substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an accredited college or university, clerical position in an assessor's office, title company, mapping position, or Auditor's/Tax Collector's/Recorder's office.

Assessment Technician III: EITHER A: Two (2) years of experience in a position comparable to an Assessment Technician II in San Luis Obispo County. OR B: Three (3) years of related experience at the level of Assessment Technician II in an Assessor's office, Tax Collector's office, or Auditor/Controller's office. One (1) year of the required experience in option B may be substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an accredited college or university.

Assessment Technician IV: EITHER A: Two (2) years of experience in a position comparable to an Assessment Technician III in San Luis Obispo County. OR B: Three (3) years of related experience at the level of Assessment Technician III in an Assessor's office, Tax Collector's office, or Auditor/Controller's office. One (1) year of the required experience in option B may be substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an accredited college or university.

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241 | **LICENSES/CERTIFICATES:**
242 | A valid driver's license is required at the time of application. A valid **CALIFORNIA** driver's
243 | license is required at the time of appointment and must be maintained throughout employment.

244 |
245 | This class specification generally describes the duties and responsibilities characteristic of the
246 | position(s) within this class. The duties of a particular position within a multi-position class may
247 | vary from the duties of other positions within the class. Accordingly, the essential functions of a
248 | particular position (whether it be a multi-position class or a single-position class) will be
249 | identified and used by medical examiners and hiring authorities in the selection process.

250 |
251 | Adopted: 4/29/98
252 | Revised 043/278/11
253 |

1 | **HUMAN RESOURCES DEPARTMENT III**

2 | San Luis Obispo County

6 | **ASSESSMENT TECHNICIAN I, II, III & IV**

7 | Originated from AT III

11 | **DEFINITION:**

12 | Under the direction of the section general supervisor, performs a wide variety of difficult
13 | support assessment duties tax assessment duties to complete and maintain the property tax
14 | roll; requiring analytical skills and initiative; assists with technical enrollment procedures and
15 | monitoring and processing of supplemental assessments provides support and service to other
16 | office sections and the public; and does other related work duties as required.

19 | **DISTINGUISHING CHARACTERISTICS:**

21 | The **Assessment Technician I** classification is the entry level position in the series.
22 | Incumbents work under supervision while learning general assessment duties, policies, and
23 | procedures.

25 | The **Assessment Technician II** classification is the journey level position in the series.
26 | Incumbents work under general supervision and perform progressively more difficult
27 | assessment service duties.

29 | The **Assessment Technician III** classification is the advanced journey level position.
30 | Incumbents work under direction and perform more complex assessment service duties; may
31 | assist in training and mentoring staff; may act as a specialist.

33 | The **Assessment Technician IV** classification is the advanced level position. Incumbents work
34 | under direction and perform the most complex assessment duties; may provide work direction
35 | and/or coordination for subordinate staff; may act as section leadworker.

38 | **REPRESENTATIVE DUTIES:**

39 | (Not in order of importance)

- 41 | • Enters, scans, researches, and maintains a large variety and volume of assessment data
42 | with a high degree of accuracy.
- 44 | • Answers phones and assists the public with general assessment questions.
- 46 | • Reads and interprets legal descriptions.
- 48 | • Prepares a variety of reports and correspondence.

- 49
- 50 • Performs basic cash handling and clerical accounting duties.
- 51
- 52 • May be called upon to assist or serve on special projects and/or teams.
- 53
- 54 • **In addition, AT II:**
- 55
- 56
- 57 • Evaluates assessment enrollments and determines appropriate course of action.
- 58 • ~~Calculates, reviews, and verifies appraisal calculations~~
- 59
- 60 • Interprets and calculates assessment values supplied by an appraiser.
- 61
- 62 • Assists/educates staff and the public about various assessment situations in person, by
- 63 telephone, and through correspondence; explains the application of various Revenue and
- 64 Taxation Codes, and other codes, statutes, and regulations.
- 65 • ~~Assists with technical questions regarding assessment procedure~~
- 66
- 67 • Assists in the design, development, and implementation of systems, workflow, procedures
- 68 and/or policies to be used in the Assessor's office.
- 69
- 70 • ~~Assists in developing and writing internal operational policies and procedures~~
- 71
- 72 • Prepares and/or processes basic pending revisions to assessment roll.
- 73
- 74 • Provides assistance to appraisers and auditor-appraisers with field work/canvassing.
- 75 • ~~Independently perform business property field canvassing~~
- 76
- 77 • **In addition, AT III:**
- 78
- 79 • Assists in training and mentoring subordinate staff.
- 80 • ~~Assists in training and monitoring the work of subordinate employees~~
- 81 • ~~Assists in providing input to employee evaluations~~
- 82
- 83 • May assist in developing computer programs directly related to assessment projects.
- 84
- 85 • Prepares and/or processes corrections to the supplemental roll; prepares and/or processes
- 86 complex pending revisions to assessment roll.
- 87 • ~~Prepares supplemental assessment corrections and roll revisions~~
- 88
- 89 • May lead in the development and implementation of procedures to be used in the Assessor's
- 90 office.
- 91
- 92 • May lead in the design, development, and implementation of systems and workflow to be
- 93 used in the Assessor's office.
- 94
- 95 • ~~Utilizes appropriate State laws and codes to determine correct enrollment of assessments~~
- 96 • ~~Develops forms to be used by the Assessor's office~~

- 97 ● ~~Prepares valuation data for computer entry~~
- 98 ● ~~Prepares manual supplemental bills~~
- 99 ● ~~Assists Auditor Appraisers with preliminary analysis of business property statements~~
- 100 ● ~~Confers with other sections within the Assessor's office regarding ownership records,~~
- 101 ~~exemptions, corrections to the roll and assessment values~~
- 102 ● ~~Coordinates with the Auditor's and Tax Collector's staff to assure proper processing of roll~~
- 103 ~~revisions and supplemental taxes~~
- 104 ● ~~Processes parcel cuts and combinations; processes tract map bonds~~
- 105 ● ~~Processes segregation requests; processes assessments for base value transfers and~~
- 106 ~~valuation reversals~~
- 107 ● ~~Compiles data and maintains records in support of the valuation and assessment process~~
- 108 ● ~~Coordinates requests for specialized computer reports~~

109 **In addition, AT IV:**

- 111 ● Acts as section leadworker; distributes work assignments; advises supervisor of operations,
- 112 staffing and resource needs; provides input on staff performance.
- 113
- 114 ● When directed, may supervise the section in the absence of the Assessment Tech
- 115 Supervisor.

116

117

118 **EMPLOYMENT STANDARDS:**

119

120 **Knowledge of:**

- 121
- 122 ● Oral and written communication skills
- 123 ● ~~Correct English usage, vocabulary, spelling, punctuation and grammar~~
- 124
- 125 ● Interpersonal skills using tact, patience, and courtesy
- 126
- 127 ● Basic Mathematics including fractions and percentages
- 128
- 129 ● General office procedures, practices, and machines
- 130
- 131 ● Personal computer usage and common software
- 132
- 133 ● Common methods of describing real property

134

135 **In addition, AT II:**

- 136
- 137 ● Provisions of the California State Constitution, Revenue and Taxation Code, and other codes
- 138 and statutes pertaining to the assessment of property for ad valorem taxation purposes
- 139
- 140 ● Assessor's office organization, procedures, and standards as well as strategic direction and
- 141 goals
- 142 ● ~~Policies and procedures of the Assessor's office~~
- 143
- 144 ● Computer applications pertinent to assessment service functions

- 145 • ~~Computer functions as they relate to the posting of assessment valuations~~
- 146 • ~~Roll revisions and processing of the supplemental roll~~
- 147 • ~~Office terminology, direct enrollment procedures~~
- 148 • ~~Valuation of personal property~~

149
150 **In addition, AT III:**

- 151
- 152 • Principles of training

153
154 **In addition, AT IV:**

- 155
- 156 • Principles of leadership and work planning

157
158 **Ability to:**

- 159
- 160 • ~~Follow and give concise and clear written and oral instructions~~
- 161
- 162 • Convey assessment laws and procedures both accurately, tactfully, and concisely, orally and
- 163 in writing
- 164 • ~~Present facts and conclusions clearly and concisely both by written and oral report~~
- 165
- 166 • Interpret, apply, and explain rules, laws, regulations, policies and procedures
- 167
- 168 • Analyze assessment service problems, prepare sound recommendations, and adopt effective
- 169 courses of action
- 170 • ~~Assemble and analyze data; maintain records~~
- 171
- 172 • Perform duties under pressure and with many interruptions while maintaining a balance
- 173 between accuracy and quantity
- 174
- 175 • Use sound judgment in researching, interpreting, applying, and explaining appropriate laws,
- 176 codes, ordinances, regulations, policies, procedures, and guidelines
- 177 • ~~Use independent judgment in performing tasks~~
- 178
- 179 • Read and interpret maps and property descriptions
- 180
- 181 • Support and follow Assessor's office policies, goals, guiding principles, and Mission – Vision
- 182 – Values Statement
- 183
- 184 • Develop and maintain positive working relationships; communicate and work effectively with
- 185 others
- 186 • ~~Establish and maintain cooperative working relationships with the public, management and~~
- 187 ~~other employees~~
- 188
- 189 • Foster a spirit of teamwork and support when interacting with staff and others
- 190
- 191 • Operate a computer and assigned office equipment
- 192

- 193 • Maintain a safe and orderly work area
- 194
- 195 • ~~Conduct research of ownership, valuation and other assessment information maintained by~~
- 196 ~~the mainframe computer system~~
- 197 • ~~Learn to process assessments in the property system~~
- 198 • ~~Quickly and accurately enter, retrieve and verify data via computer terminal~~
- 199 • ~~Access and interpret California State Revenue and Taxation Codes as they apply to~~
- 200 ~~particular assessment and enrollment problems~~

201 **In addition, AT II:**

- 202
- 203 • Compile and/or provide assessment reports
- 204

205 **In addition, AT III:**

- 206
- 207 • Train and mentor subordinate staff
- 208 • ~~Assist in orienting and training subordinates~~
- 209
- 210 • Lead and coordinate special projects
- 211

212 **In addition, AT IV:**

- 213
- 214 • Lead and coordinate work of subordinate staff
- 215 • ~~Organize workload and set priorities~~
- 216

217

218 **EDUCATION/EXPERIENCE:**

219

220 **All levels:** Graduation from high school or possession of a G.E.D. certificate.

221

222 **In addition to the above:**

223

224 **Assessment Technician I:** EITHER A: One (1) year of clerical experience in an Assessor's

225 office, Tax Collector's office, Auditor/Controller's office, Clerk/Recorder's office or similar

226 experience in a real estate related field. OR B: Two (2) years of clerical work which includes

227 computer experience. One (1) year of the required experience in option B may be substituted

228 with two (2) years of coursework (60 semester units or 90 quarter units) at an accredited

229 college or university.

230

231 **Assessment Technician II:** EITHER A: One (1) year of experience in a position comparable

232 to an Assessment Technician I in San Luis Obispo County. OR B: Two (2) years of related

233 experience at the level of Assessment Technician I in an Assessor's office, Tax Collector's office,

234 or Auditor/Controller's office. One (1) year of the required experience in option B may be

235 substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an

236 accredited college or university.

237

238 **Assessment Technician III:** EITHER A: Two (2) years of experience in a position

239 comparable to an Assessment Technician II in San Luis Obispo County. OR B: Three (3) we

240 years of related experience at the level of Assessment Technician II in an Assessor's office, Tax

241 Collector's office, or Auditor/Controller's office. One (1) year of the required experience in
242 option B may be substituted with two (2) years of coursework (60 semester units or 90 quarter
243 units) at an accredited college or university.

244 ~~-schooling in an accredited college or university and one year of experience comparable to an~~
245 ~~Assessment Technician II.~~

246
247 **Assessment Technician IV:** EITHER A: Two (2) years of experience in a position comparable
248 to an Assessment Technician III in San Luis Obispo County. OR B: Three (3) years of related
249 experience at the level of Assessment Technician III in an Assessor's office, Tax Collector's
250 office, or Auditor/Controller's office. One (1) year of the required experience in option B may
251 be substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an
252 accredited college or university.

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254
255 **LICENSES/CERTIFICATES:**

256 A valid driver's license is required at the time of application. A valid **CALIFORNIA** driver's
257 license is required at the time of appointment and must be maintained throughout employment.

258
259 This class specification generally describes the duties and responsibilities characteristic of the
260 position(s) within this class. The duties of a particular position within a multi-position class may
261 vary from the duties of other positions within the class. Accordingly, the essential functions of a
262 particular position (whether it be a multi-position class or a single-position class) will be
263 identified and used by medical examiners and hiring authorities in the selection process.

264
265 Adopted: 4/29/98

266 Revised 04/27/11

1 | **HUMAN RESOURCES DEPARTMENT IV**

2 | San Luis Obispo County

6 | **ASSESSMENT TECHNICIAN I, II, III & IV**

7 | Originated as AT IV

10 | **DEFINITION:**

11 | Under general supervision of the Assessment Technician the direction of the section s
12 | Supervisor, acts as a lead worker in the Assessment Technician series and performs a variety of
13 | tax assessment duties to complete and maintain the property tax roll; the most difficult technical
14 | and support assessment duties requiring analytical skills, initiative, and independent work skills
15 | provides support and service to other office sections and the public; and does other related
16 | duties work as required.

19 | **DISTINGUISHING CHARACTERISTICS:**

21 | The **Assessment Technician I** classification is the entry level position in the series.
22 | Incumbents work under supervision while learning general assessment duties, policies, and
23 | procedures.

25 | The **Assessment Technician II** classification is the journey level position in the series.
26 | Incumbents work under general supervision and perform progressively more difficult
27 | assessment service duties.

29 | The **Assessment Technician III** classification is the advanced journey level position.
30 | Incumbents work under direction and perform more complex assessment service duties; may
31 | assist in training and mentoring staff; may act as a specialist.

33 | The **Assessment Technician IV** classification is the advanced level position. Incumbents work
34 | under direction and perform the most complex assessment duties; may provide work direction
35 | and/or coordination for subordinate staff; may act as section leadworker.

38 | **REPRESENTATIVE DUTIES:**

39 | (Not in order of importance)

- 41 | • Enters, scans, researches, and maintains a large variety and volume of assessment data
42 | with a high degree of accuracy.
- 44 | • Answers phones and assists the public with general assessment questions.
- 46 | • Reads and interprets legal descriptions.
- 48 | • Prepares a variety of reports and correspondence.

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- Performs basic cash handling and clerical accounting duties.
- May be called upon to assist or serve on special projects and/or teams.

In addition, AT II:

- Evaluates assessment enrollments and determines appropriate course of action.
- Interprets and calculates assessment values supplied by an appraiser.
- Assists/educates staff and the public about various assessment situations in person, by telephone, and through correspondence; explains the application of various Revenue and Taxation Codes, and other codes, statutes, and regulations.
- ~~Researches and explains appraisal and technical assessment practices to the public~~
- Assists in the design, development, and implementation of systems, workflow, procedures and/or policies to be used in the Assessor's office.
- Prepares and/or processes basic pending revisions to assessment roll.
- Provides assistance to appraisers and auditor-appraisers with field work/canvassing.

In addition, AT III:

- Assists in training and mentoring subordinate staff.
- ~~Provides training to and reviews the work of subordinate Assessment Technicians~~
- Assists in developing computer programs directly related to assessment projects.
- Prepares and/or processes corrections to the supplemental roll; prepares and/or processes complex pending revisions to assessment roll.
- May lead in the development and implementation of procedures to be used in the Assessor's office.
- ~~Assists in developing and writing procedures~~
- May lead in the design, development, and implementation of systems and workflow to be used in the Assessor's office.

In addition, AT IV:

- Acts as section leadworker; distributes work assignments; advises supervisor of operations, staffing and resource needs; provides input on staff performance. ~~Assists in directing and/or coordinating the work of subordinate support or technical staff~~
- ~~May assist in the preparation of employee evaluations~~

97 • When directed, may supervise the section in the absence of the Assessment Tech
98 Supervisor.

99 • ~~Supervises subordinates in the absence of, or at the direction of, the Assessment~~
100 ~~Technician Supervisor~~

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103 • ~~Audits the supplemental assessment program and monitors computer programs related to~~
104 ~~supplemental assessments~~

105 • ~~Assists professional staff with assessment appeal and review programs~~

106 • ~~Processes revisions and corrections due to assessment appeals and reviews~~

107 • ~~Responds to correspondence; prepares statistical and narrative reports~~

108 • ~~Assists in coordinating activities with other sections~~

109 • ~~Researches regulations and laws~~

110 • ~~Utilizes appropriate State laws and regulations to determine correct enrollment of~~
111 ~~assessments~~

112 • ~~Assists in auditing and testing new mainframe programs and train assessor staff on the use~~
113 ~~of these programs~~

114

115 **EMPLOYMENT STANDARDS:**

116

117 **Knowledge of:**

118

119 • Oral and written communication skills

120 • ~~Correct English usage, vocabulary, spelling, punctuation, and grammar~~

121

122 • Interpersonal skills using tact, patience, and courtesy

123

124 • Mathematics including fractions and percentages

125

126 • General office procedures, practices, and machines

127

128 • Personal computer usage and common software

129

130 • Common methods of describing real property

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132 **In addition, AT II:**

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134 • Provisions of the California State Constitution, Revenue and Taxation Code, and other codes
135 and statutes pertaining to the assessment of property for ad valorem taxation purposes

136 • ~~Current legislation and the California State Revenue and Taxation Code concerning~~
137 ~~assessments, appeals, property taxes, and special procedures required of an assessor's~~
138 ~~office~~

139

140 • Assessor's office organization, procedures, and standards as well as strategic direction and
141 goals

142 • ~~Policies and procedures of the Assessor's office~~

143

144 • Computer applications pertinent to assessment service functions

145 • ~~Computer functions used in the Assessor's office; computer operating principles and~~
146 ~~software systems~~

147

148 **In addition, AT III:**

149

150 • Principles of training

151

152 **In addition, AT IV:**

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154 • Principles of leadership and work planning

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156 • ~~Methods and techniques of supervision~~

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160 **Ability to:**

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162 • Follow written and oral instructions

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164 • Convey assessment laws and procedures accurately, tactfully, and concisely, both orally and
165 in writing

166

167 • ~~Present facts and conclusions clearly and concisely, both by written and oral report~~

168

169 • Interpret, apply, and explain rules, laws, regulations, policies and procedures

170

171 • ~~Access and interpret the California State Revenue and Taxation Code~~

172

173 • Analyze assessment service problems, prepare sound recommendations, and adopt effective
174 courses of action

175

176 • Perform duties under pressure and with many interruptions while maintaining a balance
177 between accuracy and quantity

178

179 • Use sound judgment in researching, interpreting, applying, and explaining appropriate laws,
180 codes, ordinances, regulations, policies, procedures, and guidelines

181

182 • ~~Use independent judgment in performing tasks~~

183

184 • Read and interpret maps and property descriptions

185

186 • Support and follow Assessor's office policies, goals, guiding principles, and Mission – Vision
187 – Values Statement

188

189 • Develop and maintain positive working relationships; communicate and work effectively with
190 others

191

192 • ~~Establish and maintain cooperative working relationships with the public and staff~~

193

194 • Foster a spirit of teamwork and support when interacting with staff and others

195

193 • Operate a computer and assigned office equipment

194

195 • Maintain a safe and orderly work area

196

197 **In addition, AT II:**

198

199 • Compile and/or provide assessment reports

200

201 **In addition, AT III:**

202

203 • Train and mentor subordinate staff

204

205 • Lead and coordinate special projects

206 • ~~Motivate staff and facilitate projects in the absence of, or at the direction of, the~~
207 ~~Assessment Technician Supervisor~~

208

209 **In addition, AT IV:**

210

211 • Lead and coordinate work of subordinate staff

212 • ~~Orient, train, and coordinate the work of subordinates~~

213 • ~~Organize workload and set priorities~~

214 • ~~Apply pertinent property tax laws to complex enrollment procedures~~

215 • ~~Follow and give concise and clear written instructions~~

216 • ~~Review and interpret assessment records and appraisals~~

217 • ~~Understand the principles of automated systems and their application in the Assessor's~~
218 ~~office~~

219

220

221 **EDUCATION/EXPERIENCE:**

222

223 **All levels:** Graduation from high school or possession of a G.E.D. certificate.

224

225 **In addition to the above:**

226

227 **Assessment Technician I:** EITHER A: One (1) year of clerical experience in an Assessor's
228 office, Tax Collector's office, Auditor/Controller's office, Clerk/Recorder's office or similar
229 experience in a real estate related field. OR B: Two (2) years of clerical work which includes
230 computer experience. One (1) year of the required experience in option B may be substituted
231 with two (2) years of coursework (60 semester units or 90 quarter units) at an accredited
232 college or university.

233

234 **Assessment Technician II:** EITHER A: One (1) year of experience in a position comparable
235 to an Assessment Technician I in San Luis Obispo County. OR B: Two (2) years of related
236 experience at the level of Assessment Technician I in an Assessor's office, Tax Collector's office,
237 or Auditor/Controller's office. One (1) year of the required experience in option B may be
238 substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an
239 accredited college or university.

240

241 **Assessment Technician III:** EITHER A: Two (2) years of experience in a position
242 comparable to an Assessment Technician II in San Luis Obispo County. OR B: Three (3) years
243 of related experience at the level of Assessment Technician II in an Assessor's office, Tax
244 Collector's office, or Auditor/Controller's office. One (1) year of the required experience in
245 option B may be substituted with two (2) years of coursework (60 semester units or 90 quarter
246 units) at an accredited college or university.

247
248 **Assessment Technician IV:** EITHER A: Two (2) years of experience in a position comparable
249 to an Assessment Technician III in San Luis Obispo County, OR B: Three (3) years of related
250 experience at the level of Assessment Technician III in an Assessor's office, Tax Collector's
251 office, or Auditor/Controller's office. One (1) year of the required experience in option B may
252 be substituted with two (2) years of coursework (60 semester units or 90 quarter units) at an
253 accredited college or university.~~Completion of two years schooling in an accredited college or~~
254 ~~university, and one year of experience in a position comparable to an Assessment Technician~~
255 ~~III.~~

256
257
258 **LICENSES/CERTIFICATES:**
259 A valid driver's license is required at the time of application. A valid **CALIFORNIA** driver's
260 license is required at the time of appointment and must be maintained throughout employment.

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262 This class specification generally describes the duties and responsibilities characteristic of the
263 position(s) within this class. The duties of a particular position within a multi-position class may
264 vary from the duties of other positions within the class. Accordingly, the essential functions of a
265 particular position (whether it be a multi-position class or a single-position class) will be
266 identified and used by medical examiners and hiring authorities in the selection process.

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