

Civil Service Commission

1055 MONTEREY STREET, SUITE D-250 ♦ SAN LUIS OBISPO, CALIFORNIA 93408 ♦ 805.781.5959

**San Luis Obispo County Civil Service Commission
Regular Session Meeting
Wednesday, April 23, 2014 @ 9:00 A.M.
1055 Monterey Street, Suite D-271 San Luis Obispo, CA**



AGENDA

MEMBERS OF THE COMMISSION
President Arthur Chapman
Vice President Wayne Caruthers
Robert Bergman
Betsey Nash, SPHR
William Tappan

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 draft minutes are submitted for approval:
 - a. March 26, 2014 – Regular
4. **Job Class Specifications – Revised**
 - a. Property Transfer Technician I, II, III, IV
5. **Reports**
 - a. Commission President
 - b. Commission Counsel
 - c. Commission Secretary
6. **Adjournment**

Civil Service Commission

The San Luis Obispo County Civil Service Commission
Regular Session Meeting
Wednesday March 26, 2014 @ 9:00 A.M.
1055 Monterey Street, Suite D-271, San Luis Obispo, CA



MEMBERS OF THE COMMISSION
Arthur Chapman, President
Wayne Caruthers, Vice President
Robert Bergman
Betsey Nash, SPHR
William Tappan

MINUTES

Present: President Arthur Chapman, Vice President Wayne Caruthers, Commissioner Robert Bergman, Commissioner Betsey Nash

Absent: Commissioner William Tappan

Staff: Acting Commission Secretary Mark McKibben, Commission Clerk Robin Mason

Counsel: Acting Commission Counsel Nina Negranti

1. **Call to Order/ Flag Salute/ Roll Call**

President Chapman called the meeting to order at 9:00 A.M. and led the flag salute.

2. **Public Comment Period**

President Chapman addressed the audience asking for anyone wishing to speak to the Commission during the Public Comment Period on any matter that is not listed on today's agenda. Being none, President Chapman closed the Public Comment Period.

3. **Minutes**

February 26, 2014 – Regular

Commissioner Nash suggested a correction to the February minutes: she abstained from voting at the February meeting because she was absent from the January meeting. Commissioner Tappan was also absent so abstained. Commissioner Bergman made a motion to approve the February 26, 2014 minutes as amended. Commissioner Caruthers seconded. The motion carried 4-0-1 (Commissioner Tappan was absent).

4. **Job Class Specifications – Revised**

a. **Appraiser Trainee, I, II, III**

Personnel Analyst Mark McKibben: introduced Charron Sparks from the Assessor's Office and explained that the Assessor's Internal Management action team identified the need for revision to the job specification. He asked if there were any questions from the Commission.

Charron Sparks, Assessor's Office: addressed the Commission regarding the revised specification series and clarified the need for the revised specification. She stated that the Assessor's Office's internal management team identified the need for the specification revision as it relates to succession planning and the need to remain competitive.

Civil Service Commission

Mark McKibben: invited questions from the Commission.

Commissioner Bergman: inquired regarding turnover within the series.

Charron Sparks, Assessor's Office: responded to Commissioner Bergman's question regarding turnover due to retirements and stated they recently filled 17 positions in a very short time frame and addressed the limitations caused by this.

President asked for public comment; there was no public comment.

Commissioner Caruthers: made a motion to approve the specification revision.

Commissioner Nash: seconded; the motion carried 4-0-1.

b. Supervising Appraiser

Mark McKibben: addressed the Commission regarding the revised specification. The Commission had no comments or questions.

Commissioner Caruthers: moved to approve as written.

Commissioner Nash: seconded. The motion carried 4-0-1.

5. Job Class Specifications – New

a. Geographic Information Systems Analyst I, II, III

Mark McKibben: introduced Desiree Ramos, Information Technology/General Services Agency and presented the reason for the new specifications. The revision affects multiple departments such as the Assessor's Office, Clerk-Recorder's Office, General Services and the Health Agency. He indicated that the process included the GIS COI (Community of Interest), a steering committee consisting of Department Heads from the respective departments.

Commissioner Caruthers: asked if it is intended that there be shared resources across departments and agencies in the County.

Mr. McKibben referred Mr. Caruthers to the Strategic Plan and responded that data and technology are shared resources and must be centralized and consistent though he stated that some departments have a unique need for the new specification.

Ms. Ramos: addressed Mr. Caruthers' question regarding shared resources as it relates to strategic planning for the years 2008-2012 and the hybrid model that was recommended by the consultant who recommended immediate implementation.

Commissioner Bergman: asked how many employees are to be hired.

Civil Service Commission

Mr. McKibben: responded that there are currently eight positions allocated.

Ms. Ramos: stated that the Board of Supervisors approved the Strategic Plan as part of the Countywide Strategic Plan in 2008.

Mr. McKibben: indicated that Labor Relations is looking at salary and that all positions would be represented by SLOCEA and that there is no expectation that this would change.

Commissioner Bergman: asked regarding the language "after normal work hours" on page 5a-7.

Ms. Ramos: clarified that IT fills roles for emergency services after hours, which is a specialized task.

President Chapman: asked regarding page 5a-2 and offered a correction. Additionally, he clarified the specifics of the word "assists" in the Education requirements. He recommended a break in the proceedings so the change could be made; the Commission adjourned for a short break; the change was made.

Upon reconvening, President Chapman: discussed the proposed classification and page 5a-6.

Mr. McKibben: recommended that the Minimum Qualifications be broadened after consulting with Ms. Ramos and Kami Griffin, Planning. He presented changes to page 5a-6 regarding the GIS Analyst I Education requirement.

President Chapman: asked if Ms. Ramos was comfortable with the changes.

Ms. Ramos: responded that she was comfortable with the Education requirement verbiage regarding "course work."

President Chapman: asked for Public Comment.

Ms. Kimm Daniels, SLOCEA: responded that SLOCEA worked with Human Resources very closely regarding the specification revision and she agreed with the changes.

Ms. Nash: addressed page 5b-6.

Commissioner Bergman: moved to approve as amended.

Commissioner Caruthers: seconded. The motion passed 4-0-1.

Job Class Specifications – New

b. Senior Geographic Information Systems Analyst

Mr. McKibben: commented regarding page 5b-5, the change in Education requirements (Attachment B).

Commissioner Caruthers: Suggested that the title be spelled out when recruiting for the position.

Civil Service Commission

Mr. McKibben: commented that there is flexibility when creating publications and advertising for the recruitment.

President Chapman: asked for public comment. There was no public comment.

Commissioner Caruthers: made a motion to approve the specification as revised.

Commissioner Nash seconded. The motion carried 4-0-1.

6.
 - a. **Commission President**
President Chapman: no report.
 - b. **Commission Counsel**
Nina Negranti: no report.
 - c. **Commission Secretary**
Mark McKibben: reported that Ms. Douglas-Schatz was currently out of the office attending a CPAAC conference. He reported that there is a need for May hearing dates for classification study appeals to be heard by the Commission. He indicated that Mr. Simas would be available the weeks of May 5 and 19.

Commissioner Bergman: indicated that the Commission would be available May 7 and 21.

7. **Adjournment**
Being no further business, the meeting was adjourned by President Chapman at 10:05 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.*



Human Resources Department

SAN LUIS OBISPO COUNTY

Tami Douglas-Schatz,
Director

County Government Center, 1055 Monterey Street • Suite D-250, San Luis Obispo, CA 93408-2110 • Telephone 805.781.5959
• Fax 805.781.1044
• Email HR@co.slo.ca.us

TO: Civil Service Commission

DATE: April 23, 2014

FROM: Mark McKibben, Personnel Analyst

SUBJECT: Revised Specification: Property Transfer Technician I, II, III, IV

RECOMMENDATION

It is recommended that the Commission approve the revised classification specification as submitted.

DISCUSSION

The County Assessor's Office is responsible for the valuation of real and personal property for tax assessment purposes. The Office has responded to the recent increase in staff turnover by filling vacant positions through both promotional and open recruitments. This increased hiring activity lead the Assessor's Management Action Team (AMAT) to review their succession planning efforts, which included a review of the Office's class specifications. The team's efforts resulted in a request that Human Resources (HR) review and update the Property Transfer Technician class series specifications.

As currently allocated, the Property Transfer Technician (PTT) class series starts at the entry level with Administrative Assistant (AA) and continues through PTT III. Common practice has been that vacancies are actually filled at the PTT I level instead of the AA I level. Therefore only three levels exist for this classification, other than the Supervisor position. However in the Public Service/ Appraisal Support Section, the Assessment Technician (AT) career series has four levels of staff in their job classification, other than the AT Supervisor. The proposed changes will provide more effective succession planning, cross training, and facilitate flexibility in assignments for staff and management.

Adjustments to the Supervising Property Transfer Technician will follow once the proposed job specification is approved by the Commission.

The Administrative Office, Human Resources, Assessor's Office and SLOCEA all support the changes as proposed.

Attachments:

Property Transfer Tech I II III – track changes
Property Transfer Tech I II III IV – final draft

Assessment Technician I II III IV as reference

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1 **HUMAN RESOURCES DEPARTMENT**

2 San Luis Obispo County

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4 **PROPERTY TRANSFER TECHNICIAN I, II, III, IV**

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6 **DEFINITION:**

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8 Under the direction of the section supervisor, performs a variety of duties in the transfer of
9 property ownership and/or exemptions for tax assessment purposes; and performs other
10 related duties as required.

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12 **DISTINGUISHING CHARACTERISTICS:**

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14 **Property Transfer Technician I** is the entry level class in the series. Incumbents work under
15 close supervision while learning basic assessment/property transfer/exemption duties, policies,
16 and procedures.

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18 **Property Transfer Technician II** is the journey level class in the series. Incumbents work
19 under supervision and perform progressively more difficult property transfer and/or exemption
20 assignments.

21

22 **Property Transfer Technician III** is the advanced journey level class in the series.
23 Incumbents work under general supervision and perform complex property transfer and/or
24 exemption duties; may assist in providing training, and technical work direction to subordinate
25 staff.

26

27 **Property Transfer Technician IV** is the advanced level class in the series. Incumbents work
28 under general supervision and perform the most complex property transfer and/or exemption
29 duties; may coordinate the work of and provide training and technical direction to subordinate
30 staff; may act as specialist or section lead-worker.

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33 **REPRESENTATIVE DUTIES:**

34 (Not in order of importance)

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- 36 • Reads and interprets documents relating to property transfers of title and/or exemptions,
37 including trusts, court orders, and other legal documents.
- 38 • Scans and indexes forms into the imaging workflow system.
- 39 • Utilizes/interprets appropriate State laws and codes to determine if a property transfer is to
40 be reassessed and/or if an exemption is applicable.
- 41 • Works with attorneys, title companies, local organizations, and state and local agencies to
42 resolve discrepancies for assessment, title and/or exemption purposes.
- 43 • Processes assessment ownership information and/or exemption information using current
44 formatting as defined by state guidelines, office policy and procedures.
- 45 • Verifies accuracy of information entered on various assessment and/or exemption
46 documents; takes action to correct inaccurate or incomplete data identified in various
47 documents.
- 48 • Calculates assessment and/or exemption percentages.
- 49 • Enters, researches, processes and maintains a large volume of property assessment
50 documents with a high degree of accuracy and independence.
- 51 • Correlates information from various sources to reach property transfer/exemption decisions.
- 52 • Assists/educates staff and the public about various assessment and/or exemption situations
53 in person, by telephone, and through correspondence.
- 54 • Explains the application and interpretations of various Revenue and Taxation, Government,
55 Civil, Probate codes, and related codes, statutes, and regulations.
- 56 • Reads and interprets legal descriptions on legal documents.
- 57 • Prepares a variety of reports and correspondence.
- 58 • May participate in the design, development, and implementation of systems, workflow,
59 procedures, and/or policies to be used in the Assessor's office.
- 60 • May be called upon to assist, coordinate, or serve on special projects or teams.

61

62 **In addition:**

63 **Property Transfer Technician II**

- 64 • Determines and may prepare corrections to assessment rolls past and present.

- 65 • May participate in field inspections of properties for assessment and exemption
66 purposes.

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68 **Property Transfer Technician III**

- 69 • May review pending revisions to assessment rolls prepared by subordinate staff.
70 • May train and mentor subordinate transfer/exemption staff.
71 • May review and approve correspondence of subordinate staff.
72 • May lead in the design, development, and implementation of systems and workflow to be
73 used in the Assessor's office.

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75 **Property Transfer Technician IV**

- 76 • May present cases and appear as a witness in equalization hearings before the Assessment
77 Appeals Board, or in court.
78 • May participate and/or lead in the development and implementation of policies to be used in
79 the Assessor's office.
80 • May supervise the transfer section, when directed, in the absence of the supervisor.

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83 **EMPLOYMENT STANDARDS:**

84 **Knowledge of:**

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- 86 • Oral and written communication skills
87 • Interpersonal skills using tact, patience, and courtesy
88 • Provisions of the California State Constitution, Revenue and Taxation Code, Probate Code,
89 and other codes regulations and statutes pertaining to the assessment of property for ad
90 valorem taxation purposes
91 • Various methods and documents used to convey beneficial interest and/or title to real
92 property
93 • Transfer and exemption principles, methods, procedures, and terminology pertinent to
94 transferring/exempting real property for ad valorem property taxation
95 • Common methods of describing real property
96 • Legal descriptions, and mapping practices and procedures used in the Assessor's office

- 97 • Resources to resolve title discrepancies
- 98 • General office procedures, practices, and machines
- 99 • Basic mathematics including fractions and percentages
- 100 • Basic personal computer usage and common software

101

102 **In addition:**

103 **Property Transfer Technician II**

- 104 • Assessor's office organization, procedures, and standards as well as strategic direction and
- 105 goals
- 106 • Computer applications pertinent to property transfer and exemption functions

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108 **Property Transfer Technician III**

- 109 • Principles of leadership and training

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111 **Property Transfer Technician IV**

- 112 • Accepted methods of employee training supervision and work planning

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114 **Ability to:**

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- 116 • Follow written and oral instructions
- 117 • Accurately, tactfully, clearly and concisely convey difficult assessment laws and procedures
- 118 both orally and in writing
- 119 • Analyze transfer and/or exemption problems, prepare sound recommendations and adopt
- 120 effective courses of action
- 121 • Perform duties under pressure and with many interruptions while maintaining a balance
- 122 between accuracy and quantity
- 123 • Use sound judgment in researching, interpreting, applying and explaining appropriate laws,
- 124 codes, ordinances, regulations, policies, procedures, and guidelines
- 125 • Read and interpret maps and legal descriptions
- 126 • Embrace and follow Assessor's office policies, goals, guiding principles, and the Mission –
- 127 Vision – Values Statement
- 128 • Develop and maintain positive working relationships; communicate and work effectively with

129 others

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

131 • Operate a computer and assigned office equipment

132 • Maintain a safe and orderly work area

133

134 **In addition:**

135 **Property Transfer Technician II**

136 • Determine and accurately prepare multiple types of roll collections

137 • Field inspect properties for exemption and assessment purposes

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139 **Property Transfer Technician III**

140 • Train, mentor, and lead subordinate staff

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142 **Property Transfer Technician IV**

143 • Provide testimony and reports for equalization hearings before the Assessment Appeals
144 Board, or in court

145 • Coordinate the work of others and communicate department needs to supervisors

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147 **EDUCATION/EXPERIENCE:**

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

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151 **In addition to the above:**

152 **Property Transfer Technician I:** One year of experience in an Assessor's office, title
153 company, estate planning office or similar business working with legal descriptions and/or legal
154 documents related to real property transactions.

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156 **Property Transfer Technician II:** Either A: One year of experience as a Property Transfer
157 Technician I with San Luis Obispo County. Or B: Two years of experience performing duties
158 comparable to a Property Transfer Technician I in an Assessor's Office. Or C: Three years as a
159 Paralegal in estate planning/administration, corporate law office or similar business working
160 with legal descriptions and/or legal documents related to real property transactions.

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162 **Property Transfer Technician III:** Either A: Two years experience as a Property Transfer
163 Technician II with San Luis Obispo County. Or B: Three years of experience performing duties
164 comparable to a Property Transfer Technician II in an Assessor's Office.

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166 **Property Transfer Technician IV:** Two years as a Property Transfer Technician III in San
167 Luis Obispo County.

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169 **LICENSES/CERTIFICATES:**
170 Certain positions within this classification may require driving. When driving is an essential
171 function of the position, a valid CALIFORNIA driver's license will be required at the time of
172 appointment and must be maintained throughout employment.

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174 This class specification generally describes the duties and responsibilities characteristic of the
175 position(s) within this class. The duties of a particular position within a multi-position class may
176 vary from the duties of other positions within the class. Accordingly, the essential functions of a
177 particular position (whether it be a multi-position class or a single-position class) will be
178 identified and used by medical examiners and hiring authorities in the selection process. If you
179 have any questions regarding the duties or the working conditions of the position, please
180 contact the Personnel Department at (805) 781-5959.

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Adopted: 10-31-90
BOS Approved: 12-20-90
Revised: 10-27-04
Revised: 09-22-10
Revised: 04-23-14

1 **HUMAN RESOURCES DEPARTMENT**

2 San Luis Obispo County

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4 **PROPERTY TRANSFER TECHNICIAN I, II, III, IV & III**

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6 **DEFINITION:**

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8 Under the direction of the section supervisor, performs a variety of duties in the transfer of
9 property ownership and/or exemptions for tax assessment purposes; and performs other
10 related duties as required.

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12 **DISTINGUISHING CHARACTERISTICS:**

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14 **Property Transfer Technician I** is the entry level class in the series. Incumbents work under
15 close supervision while learning basic assessment/property transfer/exemption duties, policies,
16 and procedures.

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18 **Property Transfer Technician II** is the journey level class in the series. Incumbents work
19 under ~~general~~ supervision and perform progressively more difficult property transfer and/or
20 exemption assignments; ~~may assist in providing training and technical work direction to~~
21 ~~subordinate staff.~~

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23 **Property Transfer Technician III** is the advanced journey level class in the series.
24 Incumbents work ~~under direction~~under general supervision and perform ~~the most~~ complex
25 property transfer and/or exemption duties; may assist in providing ~~provide~~ training,
26 ~~coordination,~~ and technical work direction to subordinate staff; ~~may act as a specialist or section~~
27 ~~lead worker.~~

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29 **Property Transfer Technician IV** is the advanced level class in the series. Incumbents work
30 under general supervision and perform the most complex property transfer and/or exemption
31 duties; may coordinate the work of and provide training and technical direction to subordinate
32 staff; may act as specialist or section lead-worker.

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REPRESENTATIVE DUTIES:

(Not in order of importance)

- Reads and interprets documents relating to property transfers of title and/or exemptions, including trusts, court orders, and other legal documents.
- Scans and indexes forms into the imaging workflow system.
- Utilizes/interprets appropriate State laws and codes to determine if a property transfer is to be reassessed and/or if an exemption is applicable.
- Works with attorneys, title companies, local organizations, and state and local agencies to resolve discrepancies for assessment, title and/or exemption purposes.
- Processes assessment ownership information and/or exemption information using current formatting as defined by state guidelines, office policy and procedures.
- Verifies accuracy of information entered on various assessment and/or exemption documents; takes action to correct inaccurate or incomplete data identified in various documents.
- Calculates assessment and/or exemption percentages, ~~which may include field inspections of properties.~~
- Enters, researches, Processes ~~processes and maintains~~ a large volume of property assessment documents with a high degree of accuracy and independence; ~~searches to verify property titles;~~
- Correlates information from various sources to reach property transfer/exemption decisions.
- Assists/educates staff and the public about various assessment and/or exemption situations in person, by telephone, and through correspondence.
- Explains the application and interpretations of various Revenue and Taxation, Government, Civil, Probate codes, and related codes, statutes, and regulations.
- Reads and interprets legal descriptions on legal documents.
- Prepares a variety of reports and correspondence.
- May participate in the design, development, and implementation of systems, workflow, procedures, and/or policies to be used in the Assessor's office.
- May be called upon to assist, coordinate, or serve on special projects or teams.

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In addition:

Property Transfer Technician II

- Determines and may prepare corrections to assessment rolls past and present.
- May participate in field inspections of properties for assessment and exemption purposes.

Property Transfer Technician III

- May review pending revisions to assessment rolls prepared by subordinate staff.
- May train and mentor subordinate transfer/exemption staff.
- May review and approve correspondence of subordinate staff.
- May lead in the design, development, and implementation of systems and workflow to be used in the Assessor's office.

Property Transfer Technician IIIIV

- May present cases and appear as a witness in equalization hearings before the Assessment Appeals Board, or in court.
- May participate and/or lead in the development and implementation of policies to be used in the Assessor's office.
- May supervise the transfer section, when directed, in the absence of the supervisor.

EMPLOYMENT STANDARDS:

Knowledge of:

- Oral and written communication skills
- Interpersonal skills using tact, patience, and courtesy
- Provisions of the California State Constitution, Revenue and Taxation Code, Probate Code, and other codes regulations and statutes pertaining to the assessment of property for ad valorem taxation purposes
- Various methods and documents used to convey beneficial interest and/or title to real property

- 96 • Transfer and exemption principles, methods, procedures, and terminology pertinent to
- 97 transferring/exempting real property for ad valorem property taxation
- 98 • Common methods of describing real property
- 99 • Legal descriptions, and mapping practices and procedures used in the Assessor's office
- 100 • Resources to resolve title discrepancies
- 101 • General office procedures, practices, and machines
- 102 • Basic mathematics including fractions and percentages
- 103 • Basic personal computer usage and common software

104 • ~~Assessor's office organization, procedures, and standards as well as strategic direction and~~

105 ~~goals~~

106

107 **In addition:**

108 **Property Transfer Tech** ~~Technician II and Property Transfer Tech III~~

- 109 • Assessor's office organization, procedures, and standards as well as strategic direction and
- 110 goals
- 111 • Computer applications pertinent to property transfer and exemption functions

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113 **Property Transfer Technician III**

- 114 • Principles of leadership and training

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116 **Property Transfer Technician IV**

- 117 • Accepted methods of employee training supervision and work planning

118

119 **Ability to:**

120

- 121 • Follow written and oral instructions
- 122 • Accurately, tactfully, clearly and concisely convey difficult assessment laws and procedures
- 123 both orally and in writing
- 124 • Analyze transfer and/or exemption problems, prepare sound recommendations and adopt
- 125 effective courses of action
- 126 • Perform duties under pressure and with many interruptions while maintaining a balance
- 127 between accuracy and quantity

- 128 • Use sound judgment in researching, interpreting, applying and explaining appropriate laws,
129 codes, ordinances, regulations, policies, procedures, and guidelines
- 130 • Read and interpret maps and legal descriptions
- 131 • Embrace and follow Assessor's office policies, goals, guiding principles, and the Mission –
132 Vision – Values Statement
- 133 • Develop and maintain positive working relationships; communicate and work effectively with
134 others
- 135 • Foster a spirit of teamwork and support when interacting with staff and others
- 136 • Operate a computer and assigned office equipment
- 137 • Maintain a safe and orderly work area

138

139 **In addition:**

140 **Property Transfer Technician II**

- 141 • Determine and accurately prepare multiple types of roll collections
- 142 • ~~Train, mentor, and lead subordinate staff~~
- 143 • Field inspect properties for exemption and assessment purposes

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145 **Property Transfer Technician III**

- 146 • Train, mentor, and lead subordinate staff

147

148 **Property Transfer Technician IV**

- 149 • Provide testimony and reports for equalization hearings before the Assessment Appeals
150 Board, or in court
- 151 • Coordinate the work of others and communicate department needs to supervisors

152

153 **EDUCATION/EXPERIENCE:**

154

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

156

157 **In addition to the above:**

158 **Property Transfer Technician I:** ~~Two years~~ One year of experience in an Assessor's
159 office, title company, estate planning office or equivalent office experiences similar business
160 working with legal descriptions and/or legal documents related to real property transactions.

162 **Property Transfer Technician II:** ~~Either A: An associate's degree or 60 semester or~~
163 ~~90 quarter units from an accredited college or university and one year performing duties~~
164 ~~comparable to a~~ One year of experience as a Property Transfer Technician I with San Luis
165 Obispo County. ~~Or B: Two years of experience performing duties comparable to a Property~~
166 ~~Transfer Technician I~~ in an Assessor's Office. ~~One year of the above experience may be~~
167 ~~substituted with one year of experience as a Paralegal working with estate~~
168 ~~planning/administration, real property transactions, and/or corporate law.~~ Or C: Three years as a
169 Paralegal in estate planning/administration, corporate law office or similar business working
170 with legal descriptions and/or legal documents related to real property transactions.

172 **Property Transfer Technician III:** ~~Either A: An associate's degree or 60 semester or 90~~
173 ~~quarter units from an accredited college or university and one year of experience performing~~
174 ~~duties comparable to a~~ Two years experience as a Property Transfer Technician II with San Luis
175 Obispo County. ~~Or B: Two~~ Three years of experience performing duties comparable to a
176 Property Transfer Technician II in an Assessor's Office.
177 ~~One year of the above experience may be substituted with one year of experience as a~~
178 ~~Paralegal working with estate planning/administration, real property transactions, and/or~~
179 ~~corporate law.~~

181 **Property Transfer Technician IV:** Two years as a Property Transfer Technician III in San
182 Luis Obispo County.

184 **LICENSES/CERTIFICATES:**

185 Certain positions within this classification may require driving. When driving is an essential
186 function of the position, a valid CALIFORNIA driver's license will be required at the time of
187 appointment and must be maintained throughout employment.

189 This class specification generally describes the duties and responsibilities characteristic of the
190 position(s) within this class. The duties of a particular position within a multi-position class may
191 vary from the duties of other positions within the class. Accordingly, the essential functions of a
192 particular position (whether it be a multi-position class or a single-position class) will be
193 identified and used by medical examiners and hiring authorities in the selection process. If you
194 have any questions regarding the duties or the working conditions of the position, please
195 contact the Personnel Department at (805) 781-5959.

196 Adopted: 10-31-90

197 BOS Approved: 12-20-90

198 Revised: 10-27-04

199 Revised: 09-22-10

200 Revised: 04-23-14

HUMAN RESOURCES DEPARTMENT
San Luis Obispo County

ASSESSMENT TECHNICIAN I, II, III & IV

DEFINITION:

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

DISTINGUISHING CHARACTERISTICS:

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

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

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

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

REPRESENTATIVE DUTIES:

(Not in order of importance)

- Enters, scans, researches, and maintains a large variety and volume of assessment data with a high degree of accuracy.
- Answers phones and assists the public with general assessment questions.
- Reads and interprets legal descriptions.
- Prepares a variety of reports and correspondence.
- 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.
- 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.
- May assist 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.
- 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.
- When directed, may supervise the section in the absence of the Assessment Tech Supervisor.

EMPLOYMENT STANDARDS:

Knowledge of:

- Oral and written communication skills

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- Interpersonal skills using tact, patience, and courtesy
- Mathematics including fractions and percentages
- General office procedures, practices, and machines
- Personal computer usage and common software
- Common methods of describing real property

In addition, AT II:

- 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
- Assessor's office organization, procedures, and standards as well as strategic direction and goals
- Computer applications pertinent to assessment service functions

In addition, AT III:

- Principles of training

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

In addition, AT II:

- Compile and/or provide assessment reports

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.

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 05/25/11

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