



# MARIPOSA COUNTY

Human Resources/Risk Management • (209) 966-3227



## **RESOLUTION - ACTION REQUESTED 2018-234**

MEETING: May 22, 2018  
TO: The Board of Supervisors  
FROM: Steve Dahlem, County Counsel - Interim Human Resources Director  
RE: Amendments to Class Specs & Allocations-Assessor/Recorder's Office

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### **RECOMMENDATION AND JUSTIFICATION:**

Effective immediately, approve amendments to the class specifications for the Appraiser I/II, Appraiser III, and Assistant Assessor-Recorder; and approve amending the Appraiser I/II and III allocations in the department to reflect the correct number of positions.

At the request of the department head, the class specs for the Appraiser series in the Assessor-Recorder's Office were reviewed. Currently, the Appraiser II, Appraiser III, and Assistant Assessor-Recorder classifications require a four-year degree. If a candidate doesn't possess a four-year degree, the minimum qualifications state that two years of experience can substitute for two years of the education.

In discussions with the Assessor-Recorder, it was determined that allowing a year-for-year substitution of experience for the four-year degree requirement for the Appraiser II, Appraiser III, and Assistant Assessor-Recorder would support succession planning within the department. (The Appraiser I class doesn't require a four-year degree.) An employee within the department who may not have the higher education would then be able to move up the career ladder. The key element and requirement for all of these classifications is the possession of the California State Board of Equalization (State BOE) certificate for real estate appraisal. Certification is obtained by an individual attending courses provided by the State BOE. The State BOE requires continuing education through their agency for individuals who possess the certification. Therefore, it is recommended that the class specs for the Appraiser II, Appraiser III, and Assistant Assessor-Recorder be amended to allow a year-for-year substitution of experience clause.

Currently, the Appraiser I class requires either the possession of or the ability to obtain within one year a real estate appraisal certificate. The Appraiser II class requires the certification. It is recommended that there is no change to the certification requirements for these two positions.

The Appraiser III and the Assistant Assessor-Recorder classes currently require the possession of the advanced level certificate for real estate appraisal. Because the courses that are needed to obtain the advanced certification aren't offered on a regular

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basis by the State BOE, it was determined and it is recommended that either possessing the advanced certificate or having the ability to obtain it within two years would be appropriate for the Appraiser III. This would allow an incumbent working towards the advanced certificate the ability to still advance from the Appraiser II to the Appraiser III class. Currently, the Assistant Assessor-Recorder class is required to possess the advanced certification upon appointment to the position and this will not change.

While reviewing the Appraiser series, it was noted that the position allocations were not correct. Currently, the Allocation Schedule reflects two Appraiser III allocations and one Appraiser I/II allocation. The correct position allocations are three Appraiser I/II allocations and no Appraiser III allocations. The three Appraiser I/II allocations are filled while the Appraiser III allocations are vacant. It is recommended that the Allocation Schedule is corrected to reflect three Appraiser I/II allocations and the elimination of the Appraiser III allocations. It is important to reflect the correct levels of positions within the department.

### **BACKGROUND AND HISTORY OF BOARD ACTIONS:**

None on this action. From time to time, the Board of Supervisors approves changes to class specs and position allocations within a department.

### **ALTERNATIVES AND CONSEQUENCES OF NEGATIVE ACTION:**

Do not approve the recommended changes; amend this action as the Board desires and approve.

### **FINANCIAL IMPACT:**

N/A.

### **ATTACHMENTS:**

**Appraiser I-II (PDF)**

**Appraiser III(PDF)**

**Assistant Assessor-Recorder (PDF)**

**RESULT: ADOPTED BY CONSENT VOTE [UNANIMOUS]**

**MOVER:** Merlin Jones, District II Supervisor

**SECONDER:** Miles Menetrey, District V Supervisor

**AYES:** Rosemarie Smallcombe, Merlin Jones, Marshall Long, Miles Menetrey

**EXCUSED:** Kevin Cann

## **APPRAISER I / II**

### **DEFINITION**

To collect and analyze data from the field for the appraisal of real property for tax purposes; to conduct field inspections, studies and appraisals of residential, agricultural and commercial properties; to assist the public with questions concerning appraisals; and to perform related duties and responsibilities as required.

*Appraiser I* is an entry-level classification, working under close supervision within a framework of well-defined policies and procedures. Incumbents learn and perform routine office and field duties related to real property appraisal. This classification is flexibly staffed with Appraiser II and incumbents normally advance to the higher level after gaining experience and achieving proficiency which meet the requirements for Appraiser II.

*Appraiser II* is the journey-level classification, receiving limited supervision within a framework of standard policies and procedures. Incumbents are responsible for independent appraisal of residential, agricultural and commercial properties. Positions in this class are normally filled by advancement from the Appraiser I level, or when filled from the outside, require prior appraiser experience.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general supervision from the County Assessor-Recorder or Assistant Assessor – Recorder and lead direction from Appraiser IIIs.

### **EXAMPLES OF ESSENTIAL FUNCTIONS**

Plans strategies for accomplishing the mass appraisals of real property, including such tasks as researching the market, gathering and verifying resulting data, interviewing owners, and inspecting properties.

Locates properties using Assessor's maps, topological maps and/or surveyors' plat maps.

Conducts field investigations, studies and appraisals of residential, commercial and agricultural properties.

Inspects sites; calculates accurate square footage; measures improvements; describes construction characteristics; recognizes and notes applicable types of depreciation; assigns quality classification; draws plans of structure(s).

Photographs properties for records.

Collects and analyzes data from the field for the appraisal of real property.

Conducts an annual inspection and re-appraisal of unique properties.

Inspects land and improvement changes to determine value changes.

Estimates costs, market value and income values to determine appraisal values.

Prepares written appraisal reports for processing by clerical staff.

Prepares full narrative appraisals for appeal hearings.

Provides a variety of information to the public regarding property appraisal procedures, policies and methods; answers technical questions regarding assessments.

Represents the department in various County, civic and community meetings as required.

Maintains detailed work records and prepares comprehensive reports as required.

Performs general clerical / administrative work as required, including but not limited to copying and filing documents, sending and receiving faxes, entering and retrieving computer data, answering the telephone, scheduling appointments, etc.

*Appraiser II:* (In addition to the above)

Assists in training lower-level Appraisers as assigned.

### **EMPLOYMENT STANDARDS**

#### **Knowledge of:**

*Appraiser I:*

Basic principles of land economics.

General concepts of property appraisal.

Basic mathematics and methods of measurement.

English usage, spelling, grammar and punctuation.

Modern office procedures, practices and technology, including the use of computers for word and data processing and other applications related to appraising.

*Appraiser II:* (In addition to the above)

All pertinent federal, state and county laws, codes, regulations and standards pertaining to the tax assessment of real property.

County and department policies and procedures.

Real property appraisal principles, terminology and procedures.

Assessment recording / reporting requirements and procedures.

Construction materials, techniques, costs and determinants of quality.

Common methods of describing real property.

**Ability to:**

*Appraiser I:*

Learn, understand and apply pertinent federal, state and local laws, codes, rules and regulations.

Learn County and department policies and procedures.

Learn and apply the principles and techniques of property appraisal.

Understand and follow oral and written instructions.

Assemble and analyze data and make arithmetical calculations.

Use computer programs for assessment processing, record-keeping and reporting.

Deal tactfully and effectively with the public and with others contacted in the course of work, including hostile, irate individuals.

Communicate effectively both orally and in writing.

Prepare written and oral reports with accuracy and in a timely manner.

Work effectively under the pressure of deadlines.

*Appraiser II: (In addition to the above)*

Understand, interpret and apply pertinent federal, state and local laws, codes, rules and regulations, and County and department policies and procedures.

Independently complete appraisal assignments in a timely manner.

Assemble and analyze appraisal data and determining factors affecting the valuation of real property.

Offer logical reasons for valuation opinions in a concise, professional manner.

Read, interpret and analyze blueprints, maps and property descriptions.

Chart, describe, sketch and draft in connection with appraisal work.

Perform arithmetical, algebraic and geometric calculations with accuracy.

Analyze problems, evaluate alternatives and make sound recommendations.

Provide staff training as required.

### **TYPICAL WORKING CONDITIONS**

Work is performed in an office and field environment. Incumbent drives on surface streets and may be exposed to traffic and construction hazards, air contaminants, adverse weather conditions, temperature and noise extremes, wetness, fumes, dusts, odors, toxic or caustic chemicals, vibration.

### **TYPICAL PHYSICAL REQUIREMENTS**

Requires the mobility to work in an office and field environment. Requires the ability to sit at a desk for long periods of time and intermittently walk, stand, climb, balance, stoop, kneel, crouch, crawl and reach while performing office duties and/or field work; traverse uneven terrain; lift and/or move objects and materials of up to 25 pounds in weight; perform simple grasping and fine manipulation. Must be able to maintain effective audio-visual discrimination and perception needed for making observations, communicating with others, reading and writing, and operating office equipment. Must be able to use a telephone to communicate verbally and a keyboard to communicate through written means, to review information and enter/retrieve data, to see and read characters on a computer screen.

### **MINIMUM QUALIFICATIONS**

*Appraiser I:*

#### **Experience:**

Four years of progressively responsible experience in real estate sales, mortgage lending, title company research, building cost estimator/contractor, insurance adjuster or closely related fields.

#### **Education:**

High school diploma or GED equivalent.

#### **Substitution:**

Completion of 30 semester units of college level coursework in business administration, economics, agriculture or closely related field may be substituted for one year of the required experience.

*Appraiser II:*

#### **Experience:**

Three years of professional appraising experience, or two years as an Appraiser I in Mariposa County.

**Education:**

Graduation from an accredited college or university with a Bachelor's degree in business administration, economics, agriculture or closely related field.

**Substitution:**

Additional qualifying experience may be substituted for the education on a year-for-year basis.

**Additional Requirements:**

*Appraiser I:*

Possession of or the ability to obtain within one year of employment a California State Board of Equalization certificate for real estate appraisal.

*Appraiser II:*

Possession of a California State Board of Equalization certificate for real estate appraisal.

*Both Appraiser I and Appraiser II:*

Must meet continuing education requirements each year to retain Appraiser certification.

Possession of a valid California driver's license. Under certain circumstances, the Human Resources Director may accept a valid driver's license from another State if applicant acknowledges his/her intent to acquire a California driver's license within three months by signing an acknowledgement form.

**This class specification lists the major duties and requirements of the job and is not all-inclusive. Incumbents may be expected to perform job-related duties other than those contained in this document.**

Creation Date: 04/04 (B/S Res. No. 04-171)

Revision Date: 02/06 (B/S Res. No. 06-73); 05/18 (B/S Res. No. 18-234)

### **APPRAISER III**

#### **DEFINITION**

To collect and analyze data from the field for the appraisal of real property for tax purposes; to conduct field inspections, studies and appraisals of residential, agricultural and commercial properties; to assist the public with questions concerning appraisals; to provide lead direction of lower-level appraisers as assigned; and to perform related duties and responsibilities as required.

Appraiser III is the advance journey-level classification responsible for performing independent appraisal work. Positions in this class are normally filled by advancement from the Appraiser II, or when filled from the outside, requires extensive prior appraisal experience and an advanced level appraisal certificate.

#### **SUPERVISION RECEIVED AND EXERCISED**

Receives general supervision from the County Assessor-Recorder or Assistant Assessor – Recorder.

Exercises lead direction over Appraiser I/II's as assigned.

#### **EXAMPLES OF ESSENTIAL FUNCTIONS**

Plans strategies for accomplishing the mass appraisals of real property, including such tasks as researching the market, gathering and verifying resulting data, interviewing owners, and inspecting properties.

Locates properties using Assessor's maps, topological maps and/or surveyors' plat maps.

Conducts field investigations, studies and appraisals of residential, commercial and agricultural properties.

Inspects sites; calculates accurate square footage; measures improvements; describes construction characteristics; recognizes and notes applicable types of depreciation; assigns quality classification; draws plans of structure(s).

Photographs properties for records.

Collects and analyzes data from the field for the appraisal of real property.

Conducts an annual inspection and re-appraisal of unique properties.

Inspects land and improvement changes to determine value changes.

Estimates costs, market value and income values to determine appraisal values.

Processes property sales and transfers.



Prepares written appraisal reports for processing by clerical staff.

Prepares full narrative appraisals for appeal hearings.

Provides a variety of information to the public regarding property appraisal procedures, policies and methods; answers technical questions regarding assessments.

Provides lead direction and training of lower-level appraisers as assigned.

Represents the department in various County, civic and community meetings as required.

Maintains detailed work records and prepares comprehensive reports as required.

Performs general clerical / administrative work as required, including but not limited to copying and filing documents, sending and receiving faxes, entering and retrieving computer data, answering the telephone, scheduling appointments, etc.

Keeps abreast of applicable market trends and conditions.

### **EMPLOYMENT STANDARDS**

#### **Knowledge of:**

All pertinent federal, state and county laws, codes, regulations and standards pertaining to the tax assessment of real property.

County and department policies and procedures.

Principles of land economics.

Real property appraisal principles, terminology and procedures.

Basic mathematics and methods of measurement.

Assessment recording / reporting requirements and procedures.

Construction materials, techniques, costs and determinants of quality.

Common methods of describing real property.

Preparation of specialized and technical appraisal reports.

English usage, spelling, grammar and punctuation.

Modern office procedures, practices and technology, including the use of computers for word and data processing and other applications related to appraising.

Techniques of appraisal training and supervision.

Safe work methods.

**Ability to:**

Understand, interpret and apply pertinent federal, state and local laws, codes, rules and regulations, and County and department policies and procedures.

Understand and follow oral and written instructions.

Analyze problems, evaluate alternatives and make sound recommendations.

Develop specialized appraisal procedures and techniques.

Independently complete appraisal assignments in a timely manner.

Assemble and analyze appraisal data and determining factors affecting the valuation of real property.

Read, interpret and analyze blueprints, maps and property descriptions.

Chart, describe, sketch and draft in connection with appraisal work.

Perform arithmetical, algebraic and geometric calculations with accuracy.

Offer logical reasons for valuation opinions in a concise, professional manner.

Use computer programs for assessment processing, record-keeping and reporting.

Deal tactfully and effectively with the public and with others contacted in the course of work, including hostile, irate individuals.

Communicate effectively both orally and in writing.

Prepare written and oral reports with accuracy and in a timely manner.

Work effectively under the pressure of deadlines.

Provide effective staff training and leadership as required.

**TYPICAL WORKING CONDITIONS**

Work is performed in an office and field environment. Incumbent drives on surface streets and may be exposed to traffic and construction hazards, air contaminants, adverse weather conditions, temperature and noise extremes, wetness, fumes, dusts, odors, toxic or caustic chemicals, vibration.

**TYPICAL PHYSICAL REQUIREMENTS**

Requires the mobility to work in an office and field environment. Requires the ability to sit at a desk for long periods of time and intermittently walk, stand, climb, balance, stoop, kneel, crouch, crawl and reach while performing office duties and/or field work; traverse uneven terrain; lift and/or move objects and materials of up to 25 pounds in weight; perform simple grasping and fine manipulation. Must be able to maintain effective audio-visual discrimination and perception needed for making observations, communicating with others, reading and writing, and operating office equipment. Must be able to use a telephone to communicate verbally and a keyboard to communicate through written means, to review information and enter/retrieve data, to see and read characters on a computer screen.

**MINIMUM QUALIFICATIONS**

**Experience:**

Four years of professional appraising experience, or two years as an Appraiser II in Mariposa County.

**Education:**

Graduation from an accredited college or university with a Bachelor's degree in business administration, economics, agriculture or closely related field.

**Substitution:**

Additional qualifying experience may be substituted for the education on a year-for-year basis.

**Additional Requirements:**

Possession of a valid California driver's license. Under certain circumstances, the Human Resources Director may accept a valid driver's license from another State if applicant acknowledges his/her intent to acquire a California driver's license within three months by signing an acknowledgement form.

Possession of or the ability to obtain within two years an advanced level California State Board of Equalization certificate for real estate appraisal.

Must meet continuing education requirements each year to retain Appraiser certification.

**This class specification lists the major duties and requirements of the job and is not all-inclusive. Incumbents may be expected to perform job-related duties other than those contained in this document.**

**ASSISTANT ASSESSOR - RECORDER**

**DEFINITION**

To assist in planning, organizing, directing and evaluating the operations of the Assessor-Recorder's Office; to plan, organize and supervise the work of appraisal and recording staff; to perform difficult and complex appraisal work; to act for the County Assessor-Recorder in his/her absence; and to perform related duties and responsibilities as required.

**SUPERVISION RECEIVED AND EXERCISED**

Receives general direction from the County Assessor-Recorder.

Exercises direction over professional, technical and clerical staff.

**EXAMPLES OF ESSENTIAL FUNCTIONS**

Assists in the development and implementation of goals, objectives, policies and procedures for the Assessor-Recorder's Office.

Monitors and ensures department compliance with all applicable laws, regulations, codes, ordinances and standards.

Supervises the work of assigned appraisal, technical and clerical staff; supervisory duties include planning and assigning work, evaluating performance, maintaining standards, coordinating activities, participating in employee interviews and selection, allocating personnel, acting on employee problems, and implementing employee discipline as appropriate.

Develops and administers employee training programs.

Assists in preparing and monitoring the department's annual budget.

Assists in identifying and implementing new technology to enhance department efficiency and effectiveness.

Performs difficult and specialized appraisals of commercial, residential, rural, farm, timber, real and personal property.

Assists appraisal staff in preparing cases for presentation, and helps defend appraisals before local and state assessment appeals boards.

Processes typical property transfers, splits, new construction, etc.

Ensures the provision of professional, courteous customer service by employees at all times.

Assists in coordinating department activities and services with those of other departments, divisions and agencies as appropriate.

Represents the Assessor-Recorder in his/her absence or as directed at meetings and other functions.

Provides a variety of information to the public regarding property appraisal and recording procedures, policies and methods; answers technical questions regarding assessments.

Represents the department in various County, civic and community meetings as required.

Maintains detailed work records and prepares comprehensive reports as required.

Performs general administrative work as required, including but not limited to preparing correspondence, copying and filing documents, entering and retrieving computer data, ordering office supplies, etc.

### **EMPLOYMENT STANDARDS**

#### **Knowledge of:**

All pertinent federal, state and county laws, codes, regulations and standards pertaining to the tax assessment of real property and filing of legal documents.

County and department policies and procedures.

Principles and practices of organization, public administration, budget administration and personnel management.

Philosophy and principles of property appraisals for tax assessment purposes.

Construction materials, techniques, costs and determinants of quality.

Basic principles of land economics.

Basic mathematics and methods of measurement.

Common methods of describing real property.

Assessment recording / reporting requirements and procedures.

Legal requirement for the recording of legal documents.

English usage, spelling, grammar and punctuation.

Modern office procedures, practices and technology, including the use of computers for word and data processing and other applications related to appraising and recording.

**Ability to:**

Understand, interpret and enforce pertinent federal, state and local laws, codes, rules and regulations, and County and department policies and procedures.

Assist in planning, organizing and directing the work of appraisal personnel.

Develop and administer sound departmental policies and procedures.

Analyze problems, evaluate alternatives and make sound recommendations.

Select, supervise and train subordinates.

Plan and direct training programs for professional, technical and clerical personnel.

Analyze, evaluate and modify appraisal methods and standards.

Assemble, analyze and summarize information related to appraisals for tax assessment purposes.

Offer logical reasons for valuation opinions in a concise, professional manner.

Perform highly complex appraisals.

Read, interpret and analyze blueprints, maps and property descriptions.

Chart, describe, sketch and draft in connection with appraisal work.

Use computer programs for assessment processing, record-keeping and reporting.

Deal tactfully and effectively with the public and with others contacted in the course of work, including hostile, irate individuals.

Communicate effectively both orally and in writing.

Perform arithmetical, algebraic and geometric calculations with accuracy.

**TYPICAL WORKING CONDITIONS**

Work is performed in an office and field environment. Incumbent drives on surface streets and may be exposed to traffic and construction hazards, adverse weather conditions, temperature extremes, and wetness.

**TYPICAL PHYSICAL REQUIREMENTS**

Requires the mobility to work in an office and field environment. Requires the ability to sit at a desk for long periods of time and intermittently walk, stand, climb, balance, stoop, kneel, crouch, crawl and reach while performing office duties and/or field work; traverse uneven terrain; lift and/or move objects and materials of up to 25 pounds in weight; perform simple grasping and fine manipulation. Must be able to maintain effective audio-visual discrimination and perception needed for making observations, communicating with others, reading and writing, and operating office and specialized field equipment. Must be able to use a telephone to communicate verbally and a keyboard to communicate through written means, to review information and enter/retrieve data, to see and read characters on a computer screen.

**MINIMUM QUALIFICATIONS**

**Experience:**

Six years of increasingly responsible recording and/or appraisal experience, including at least two years in a lead, supervisory or management capacity.

**Education:**

Graduation from an accredited college or university with a Bachelor's degree in business administration, economics, agriculture or closely related field.

**Substitution:**

Additional qualifying experience may be substituted for the college education on a year-for-year basis.

**Additional Requirements:**

Possession of a valid California driver's license. Under certain circumstances, the Human Resources Director may accept a valid driver's license from another State if applicant acknowledges his/her intent to acquire a California driver's license within three months by signing an acknowledgement form.

Possession of an advance level California State Board of Equalization certificate for real estate appraisal.

Must meet continuing education requirements each year to retain Appraiser certification.

**This class specification lists the major duties and requirements of the job and is not all-inclusive. Incumbents may be expected to perform job-related duties other than those contained in this document.**