

COUNTY OF SOLANO
Class Specification
CHIEF ASSESSOR RECORDER

CLASS SUMMARY

Under general direction, plans, manages, and directs the operations and staff of the Assessor and Recorder Division and the administrative component of the Assessor Division within the County's Assessor/Recorder Department ensuring that taxable property is assessed correctly and placed on the assessment roll as required by law.

The incumbent directs office administration and the complex technical/clerical operations involved in preparing and maintaining records and documents related to real property valuations, ownerships, and encumbrances; tax assessment rolls; and vital records; establishes and monitors assessment standards and practices; plans long-term programs; and related work as required.

This is a single position senior management level class responsible to assist the Assessor/Recorder and Assistant Assessor/Recorder in directing and overseeing all administrative and clerical functions essential to the preparation and maintenance of the property tax assessment roll and recordation of documents. The incumbent serves as a member of the Department's senior management team and may act in the absence of the Assessor/Recorder and/or the Assistant Assessor/Recorder. The incumbent is Civil Service Exempt, at-will, and serves at the pleasure of the appointing authority.

DISTINGUISHING CHARACTERISTICS

This class is distinguished from the:

- **Assessor/Recorder** and **Assistant Assessor/Recorder** who have the overall authority and responsibility in planning, organizing, and directing the County's Assessor/Recorder Department; and the
- **Chief Appraiser** who has senior management responsibility in planning, organizing, and directing the operations of the Assessor/Recorder's Valuation Division.

SUPERVISION RECEIVED AND EXERCISED

- Supervision is provided by the Assessor/Recorder and Assistant Assessor/Recorder.
- Supervision is provided to subordinate managers, and indirectly to supervisors, technical, and administrative support staff.

ESSENTIAL DUTIES This class specification represents the core areas of responsibilities; specific position assignments will vary depending on the needs of the department.

Exercises management and oversight for the Assessor/Recorder's property tax assessment roll and recordation of official documents, as well as overall office operations, by:

- Planning, organizing, and managing departmental services including, but not limited to, preparation and establishment of the assessment roll; property tax exemptions; and recordation of legal documents.
- Advising management and staff on issues pertaining to assessments, including assessment law and assessment law changes; analyzing and interpreting legislative changes affecting

assessor, and record management functions; and making recommendations on policies, procedures, manuals, and standards to ensure compliance, accuracy, conformance to codes and the financial integrity of the assessment roll.

- Producing and delivering the local secured and unsecured tax assessment rolls by July 1 of each year.
- Creating and maintaining indexes of recorded documents/official records; maintaining permanent archives of images; issuing plain or certified copies of certificates and licenses; and functioning as the local registrar of public marriage licenses issued in the county.
- Determining the assessment status of property when it changes ownership or undergoes new construction; supervising and personally participating in determining the accessibility of transferred properties; and identifying and applying all legal exemptions and exclusions.
- Managing the receipt and review of all documents, records, forms, and permits related to real property valuations, titles and ownerships and encumbrances; tax assessment rolls; and vital records (birth, death, marriage, and adoption).
- Interpreting policies and practices to the staff and to the public; providing a public information service to assist taxpayers with questions about property ownership and assessment; and responding to outside inquiries and surveys.
- Computing and collecting all applicable recording fees and documentary transfer taxes.
- Appearing as an expert witness at hearings of the Assessment Appeals Board; providing subject matter expert testimony and advice concerning assessment appeals.
- Serving as liaison with other County departments and the State Board of Equalization regarding property assessment and standards.
- Managing the records management functions, including records retention schedules, subpoenas of records, and protection and confidentiality of assessment records.
- Conducting statistical and special studies; preparing written reports on administrative, managerial, operational, assessment and appraisal issues.
- Developing, interpreting, implementing and evaluating new programs, policies and procedures.
- Providing internal consultation and analysis of a variety of complex fiscal, budgetary and programmatic matters and making recommendations.
- Managing administrative services including budgeting, accounting, human resources, purchasing, organizational analyses, automated office and program systems, safety, training, reporting systems to other governmental agencies, and facility management.
- Responding to customer complaints and recommending changes to improve customer service.
- Managing the work of management, technical, fiscal and office support staff engaged in performing tax assessment and recordation activities, including the full breadth of typical supervisory duties.
- Supporting and ensuring compliance with County and Department policies and procedures including those related to equal opportunity and to safety.

Performs other duties of a similar nature and/or level as assigned.

MINIMUM QUALIFICATIONS

Education and Experience:

Pattern 1: Five (5) years of experience in an Assessor or Recorder's office in California performing assessment and record management functions, of which two (2) years must have been in a supervisory capacity.

or

Pattern 2: Graduation from an accredited four-year college or university with major course work in business administration, public administration, accounting, economics, or other courses related to work assignments.

and

Two (2) years of experience in a California County Assessor's or Recorder's Office, or California County Property Tax Audit department/division, leading or supervising staff performing assessment and record management functions.

Note 1: Formal training for managing public sector records is desirable.

Licensing, Certification and Registration Requirements:

- Possession of a valid California Driver's License, Class C.
- Possession of an Advanced Assessment Analyst Certification is desirable

REQUIRED COMPETENCIES

Knowledge of:

- Provisions of the Revenue and Taxation Code, Property Tax Rules, California State Board of Equalization regulations, California and federal laws, and other rules governing appraisal of property for assessment purposes and/or appraisal status determination.
- Procedures and techniques used to search assessment records, conduct title searches, and gain information from others.
- Practices and procedures used to determine standard and special exemptions and research and respond to appeals.
- Current procedures, legal instruments, and terminology used in the various phases of appraising and assessing property; preparing assessment and supplemental assessment rolls; preparing real property descriptions; conveying, transferring, and recording property titles; and processing and maintaining records.
- Local, state, and federal statutes and court decisions affecting local assessment procedures.
- Operating procedures of a California County Assessor's or Recorder's Office.
- Public sector records management practices and procedures including records retention schedules, subpoenas of records, and protection and confidentiality of assessment records.
- Practices and techniques of administrative and statistical analysis, statistical report preparation, and graphic presentation of analysis.

- Principles and practices of management, supervision, leadership, training, motivation, team building, disciplinary processes, and conflict resolution.
- Principles and practices of budget preparation and control, cost analysis, and fiscal management.
- Oral communication techniques to include presentations to groups of various sizes in a positive, inclusive, and motivational manner.
- Customer service techniques for dealing with customers, often in a difficult or confrontational situation.
- English composition, spelling, grammar, vocabulary, and punctuation.
- Formats and appropriate terminology for business communications such as correspondence, policies, procedures, and narrative and statistical reports.
- Standard office procedures, practices, equipment, personal computers, and software.

Skills/Abilities to:

- Plan, organize, and direct the day-to-day administration, technical, and systems operations involved in preparing and maintaining records and documents related to property records, assessment rolls, and vital records.
- Prepare the annual assessment roll for submission to the County Auditor/Recorder and the State Board of Equalization.
- Understand, interpret, and apply applicable federal, state, and local laws, codes, regulations, and policies and use good judgment in their application.
- Understand the legal mandates of property transfer documents.
- Read and interpret blueprints, sketches, and legal property descriptions.
- Manage and maintain the confidentiality of records and information per pertinent laws/regulations.
- Identify and analyze administrative and operational problems; evaluate and modify methods, procedures, forms, and systems; and implement operational changes and administrative and technical systems, directives, and procedures relating to assessments, appraisals, and records management.
- Collect, record, tabulate and interpret data and prepare comprehensive statistical reports.
- Develop, monitor, and interpret budgets and other financial documents.
- Work independently, manage simultaneous work projects, and carry them through to successful completion.
- Conduct meetings effectively and facilitate special projects.
- Represent the Department in meetings with representatives from various County and non-County organizations, with local businesses, customers, and the public.
- Develop and maintain effective working relationships with elected officials, department heads, employees, the press, other agencies, and the public.
- Select, supervise, and evaluate the work of management staff.
- Participate in the selection and indirect supervision of supervisory, technical, and clerical staff.
- Investigate and resolve disciplinary issues.
- Communicate clearly and concisely, both verbally and in writing.
- Read and write English at a level necessary to research and understand legal, technical, and complex guidelines, documents, manuals, records, and reports and to produce clear and concise reports, narratives, policies, procedures, and summaries.

PHYSICAL REQUIREMENTS

- Vision: The incumbent must have close visual acuity, with or without correction, to prepare and analyze data and figures, transcribe, view a computer terminal, read, etc. and have depth perception to operate a motor vehicle.
- Hearing/Talking: The incumbent must perceive the nature of sounds at normal speaking levels with or without corrective devices and receive detailed information through oral communication. The incumbent is also required to be able to communicate to express or exchange ideas.
- Mobility and Dexterity: The incumbent is typically required to perform the following: stooping, kneeling, reaching, occasional standing, occasional walking, pushing, pulling, fingering, grasping, feeling (i.e., sense of touch), and repetitive motion.
- Lifting, Carrying, Pushing and Pulling: The incumbent is required to exert up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects.

WORKING CONDITIONS

- Office Work: The incumbent mostly works in an office setting.
- Traffic Hazards: The incumbent may be required to operate a vehicle and therefore is subject to traffic hazards while driving.

OTHER REQUIREMENTS

- Background Checks: The County may conduct a background check and a reference check on candidates prior to appointment. The background check may include the State of California Department of Justice, the Federal Bureau of Investigation, the Child Abuse Central Index (CACI), and criminal checks in any state, city, and/or county where the applicant has lived, worked, or gone to school.
- Independent Travel: The incumbent may be required to travel independently.
- Work Hours: The incumbent may be required to work weekends, holidays, irregular hours, on-call, and after normal business hours.
- Conflict of Interest: The incumbent is required to file an annual Conflict of Interest Statement in accordance with the provisions of the Political Reform Act of 1974.

CLASS HISTORY AND CLASS INFORMATION

Debbie Vaughn

Director of Human Resources

- Date Approved by the Director of Human Resources: 09/12/23
- Date Class Title Added to the Listing of Classes & Salaries by the Board of Supervisors: 09/17/23
- Date(s) Revised: 09/12/23

County of Solano – Class Specification
Chief Assessor Recorder

- Date(s) Retitled and Previous Titles of the Class: Chief Deputy Assessor/Recorder – Administration (Established 8/93; Inactivated 3/03)
- Class Code: 107170