



Department of Employee Relations

July 24, 2002

John O. Norquist
Mayor

Jeffrey Hansen
Director

Florence Dukes
Deputy Director

Frank Forbes
Labor Negotiator

Michael Brady
Employee Benefits Manager

To the Honorable
The Committee on Finance and Personnel
Common Council
City of Milwaukee

Dear Committee Members: Re: Common Council File Number 020381

The following reclassification was approved by the City Service Commission on July 23, 2002:

In the Assessor's Office, one position of Office Assistant II, Pay Range 410, held by Mary Ellen Klamerus, was reclassified to Office Assistant III, Pay Range 425.

The Job evaluation report covering the above position is attached.

Sincerely,

Jeffrey S. Hansen
Employee Relations Director

JSH:pb

Attachments: Job Evaluation Report
 Fiscal Note

c: Mary Reavey, Darryl Malquist, Mary Ellen Klamerus, Richard Abelson, John Garland, Robert Klaus, and John English

JOB EVALUATION REPORT

City Service Commission Meeting Date: July 23, 2002

Incumbent: Mary Ellen Klamerus Department: Assessor

Present	Request
Title: Office Assistant II	Title: Office Assistant III
Pay Range: 410 (\$24,928 - \$29,332)	Salary: PR 425 (\$28,348 - \$31,360)
Step: 7 (\$29,332)	Source: Department
Recommendation:	
Title: Office Assistant III Salary: Pay Range 425 (\$28,348 - \$31,360) New Rate: \$29,636	
Rationale: A review of this position's duties and responsibilities indicate that the nature of work performed warrants a change in classification. The incumbent is performing more specialized duties in the Assessor's Office that potentially have a direct impact upon reevaluation of property assessments in the City of Milwaukee. The incumbent performs duties that are parallel to the functions of an Office Assistant III.	
History of Position: This position was last studied in conjunction with the 1995 Citywide study of office support positions.	

Action Required:

In the Positions Ordinance, under Assessor's Office, Systems and Administration Division, delete one position of Office Assistant II and add one position of Office Assistant III.

Background:

In October of 2000, the Department of Employee Relations received a request from Mary Reavey, the City Assessor to reclassify the Office Assistant II in Sales and Administration Division of the Assessor's Office. A revised job description was submitted in conjunction with this request. Employee Relation's staff interviewed Mary Ellen Klamerus, the incumbent; Pat Lowe, the immediate supervisor; and Darryl Malquist, the Network Administrator.

Because the incumbent, an Office Assistant II, has been performing the same higher level duties as the Office Assistant III for over two years, as a matter of equity in positions, the Assessor's Office is requesting a reclassification for Mary Ellen Klamerus to Office Assistant III.

Duties and Responsibilities:

Basic Function: Assist the Assessor's Office in the processing of sales data, assessment objections and maintenance of Real Estate Master File. Outlined below are the specific duties and responsibilities:

- 25% Reviews and screens real estate transfer returns for valid and invalid transactions and identifies potential tax exempt properties for investigation.
- 20% Verifies and updates owner name and mailing address using computer files and transfer return. Record information on transfer returns as required, using data from computer files. Enters sales figures from transfers for processing SINV system.
- 5% Assembles sales books for use by public.
- 5% Assists in processing deeds as required.
- 20% Performs preliminary processing on sales transfers received from DOR. After processing, sort and file transfers. Maintain the files, sending transfer forms down to Central Records and organizing new files.
- 5% Makes address changes as required by taxpayers or as requested by assessors.
- 5% Maintains the library, distributing information, periodicals received by the department.
- 10% Assists in receptionists' duties
- 5% Performs other clerical duties as assigned.

The minimum qualifications for this position include skill in data entry and familiarity with the Assessor's Office ownership files, objections processing and transfer return processing. Requires at least four years of general office work experience. Applicant should be proficient in data entry skills utilizing computer keyboard. Applicant should possess skills necessary to communicate effectively with the public.

Analysis:

Based on the duties and responsibilities of the incumbent, positions in the Office Assistant series will be utilized for the comparison.

Office Assistant Series:

This series includes all clerical and office position in City government performing general office duties, as distinguished from those working directly with one or a few managers, professionals, or elected officials in a secretarial capacity.

Office Assistant II

Performs varied clerical duties in accordance with standard procedures. Applies knowledge of departmental policies and procedures, and uses a general understanding of other department's functions. Screen telephone calls, answers questions and provides information. May work with others on a team to complete special projects. Accesses and inputs information via mainframe applications. Uses office equipment and microcomputer software to prepare standard and complex documents from various sources of written or dictated input.

Requirements: Two years of clerical experience with at least six months of experience as an Office Assistant I.

Office Assistant III

Performs diverse and complex duties involving the application of standard procedures to a variety of clerical assignments. Selects and interprets data, and demonstrates a thorough knowledge of departmental and organizational policies and procedures in assigned area of responsibility. Screens telephone calls, answers questions and provides information. Some telephone and in-person work may be difficult due to the nature of questions or customers served. Uses advanced features of software packages on a regular basis to produce complex documents. May work with others on a team to complete special projects. May guide and check the work of other employees.

Requirements: Four years of clerical experience with at least one year of experience at the office Assistant II level or above. Job-related coursework may be substituted for up to six months of experience requirement.

Changes in Duties and Responsibilities

This position is currently assigned to the sales and administration division of the Assessors Office. A number of years ago, this department lost one of its key employees, Mr. Ed Frick, due to death. Mr. Edward Frick served in many capacities from staff support to key manager. As the department was forced to reassign duties they chose employees who were familiar with the operations of the Office, who had developed excellent job-related skills, and who consistently exhibited a reliable knowledge base in real estate marketing. The incumbent's knowledge, skill level and reliability were a perfect match for this new permanent assignment as she had been performing similar duties since 1997 as an Office Assistant I.

As an Office Assistant I, the incumbent had assisted the Office Assistant III in prescreening real estate transfers that affect the property assessment. This meant processing the easier property changes that related to no-fee-sales. The incumbent's duties involved verifying addresses and gathering documentation for the Office Assistant III and the Manger responsible for prescreening property transactions. Over time the incumbent gained expertise in dealing with property transactions.

At the time the new duties were assigned to the incumbent, it was uncertain how these additional duties would impact the nature and responsibility level of the position. The new duties had previously been performed by the supervisor, Edward Frick, and the Office Assistant III.

July 23, 2002

The focus at the time was on making sure daily operations ran smoothly and that the data necessary for the tax reevaluation process would be available.

The incumbent's current duties involve analyzing property transactions to the extent of noting changes in sale price of foreclosures, investment properties and multiple sales transactions. In addition, she cites anything that has the potential to impact the property assessment such as low sale price, name changes, etc. The appraisers use this information in the tax reevaluation process. Also, in verifying property sales she compares ownership changes with the legal property description to verify that the transaction involves the property on the transfer. This input is crucial to tax assessment because if the owner's name and address is not correct, as well as, the wrong piece of property tax billing is delayed. In essence, with the changes to her duties, the incumbent serves as a key participant in updating, verifying and analyzing property transactions that are necessary for the property reevaluation process. These are the same duties as performed by the incumbent's coworker, Raven Thurman, Office Assistant III.

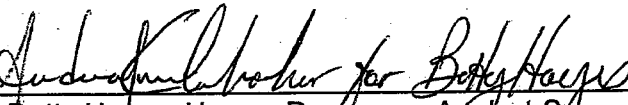
These duties involve a higher level of clerical responsibility with a high consequence of error than previously performed as an Office Assistant I. For example, if changes are not listed correctly, they may result in the tax assessment being incorrect. In addition, incorrect information could lead to a loss of revenues for the City.

Recommendation

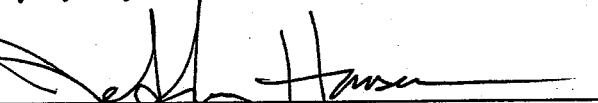
The analysis of this position reveals that the Office Assistant II, Mary Ellen Klamerus and the Office Assistant III, Raven Thurman, share the entire prescreening process, and perform the same functions. They are responsible for analyzing property sales transactions to note any special circumstances that may affect the evaluation of property in the City of Milwaukee. The property appraisers rely on the data provided by these individuals, especially during the tax reevaluation process. These are specialized tasks that are imperative to the functions of the City of Milwaukee Assessor's Office. In the course of the study, Darryl Malquist shared that these individuals review about 60% of all property sales transactions that are received in the Assessor's Office.

We therefore recommend that this position be reclassified to Office Assistant III in PR 435.

Prepared by:


Betty Hayes, Human Resources Analyst-Sr.

Reviewed by:


Jeffrey Hansen, Employee Relations Director