NOTICE OF PROPOSED CLASSIFICATION ACTIONS BY
THE HUMAN RESOURCES DIRECTOR

The following actions are being posted in accordance with Rule 109. In the absence of requests to meet addressed to the Human Resources Director, the proposed changes will become final seven (7) calendar days from the posting date.

Posting No: 03
Fiscal Year: 2011/2012
Posted Date: August 2, 2011
Reposted: October 12, 2011

AMEND THE FOLLOWING JOB SPECIFICATION(S):
(Draft job specification attached.)

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<th>Item #</th>
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For additional information regarding the above proposed action, please contact Christina Penland, Senior Classification and Compensation Analyst, at (415) 557-4848 or email her at Christina.Penland@sfgov.org.

Requests to meet on an item should be addressed to the Human Resources Director, 1 South Van Ness, 4th Floor, San Francisco, CA 94103. All requests must be received in writing no later than close of business seven (7) calendar days from the posting date. FAX’d copies will be accepted as timely with original to follow. Copies of this notice may be obtained from the Information Center, 1 South Van Ness, 4th Floor or from DHR’s website at: http://sfdhr.org/index.aspx?page=109

c: All Employee Organizations
   Anita Sanchez, CSC
   Christina Fong, DHR
   Carmela Villasica, DHR
   Linda Cosico, DHR
   RAS Team Leader(s)
   DHR Support Services
   Martin Gran, DHR
   Steve Ponder, DHR
   Christina Penland, DHR
   Maria Newport, SFERS
   Clare Leung, MTA
   Suzanne Wong, MTA
   E-File
INTRODUCTION

Under immediate supervision, the Real Property Appraiser Trainee works at the entry or training level in the professional appraisal series in the Assessor’s Office. Incumbents in this class receive substantial formal classroom and on-the-job training; they initially function as an assistant to higher level appraisal staff and with increasing training and experience will be required to perform simple and routine appraisals.

DISTINGUISHING FEATURES

The 4260 Real Property Appraiser Trainee is the entry-level class in the professional appraisal series. Incumbents receive substantial classroom and on-the-job training under the immediate supervision of professional more experienced appraisal staff. At this level, incumbents exercise less independent discretion and judgment in matters related to work procedures and methods. This class is distinguished from Class 4261 Real Property Appraiser in that the latter is the journey level class responsible, under general supervision, for performing the full range of appraisal duties independently with only occasional instruction or assistance examining, analyzing and evaluating real property for tax assessment purposes.

SUPERVISION EXERCISED: None.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Completes formal classroom training, on-the-job training exercises, and closely monitored work assignments.

2. Under immediate supervision, analyzes sales and economic factors within assigned districts by reviewing leases, rental agreements, trust deeds and market data for assessment purposes.

3. Learn to appraise various types of real property to establish values for tax assessment purposes and to recommend changes in valuation.

4. Under immediate supervision, learns to estimate property value by conducting site inspections and using standardized market, cost and income valuation approaches, comparing land sales, improvement costs, market information and by making site visits in order to estimate the taxable value of properties within a district to comply with the Revenue and Taxation Code.

5. Under immediate supervision, gathers and analyzes information from a variety of sources, including property statements, leases, rental agreements, trust deeds, market data, and interviews with tax payers, in order to update information on land and/or improvements to be used for assessment and taxation purposes.

6. Under immediate supervision, investigates complaints on assessments from property owners.
Title: Real Property Appraiser Trainee  
Job Code: 4260

owners by conducting on site visits, and reviewing and researching records and reports; makes recommendations regarding resolution of such complaints; explain findings to property owners.

6. Recommends changes in valuation to supervisor, both orally and in writing.

5. Learn to prepare appeal packages for properties under assessment appeal; testify and/or present before Assessment Appeals Board; may present at other quasi-judicial bodies.

6. Prepares various records and reports, including those related to appraisals of real property, related to appraisal of all classes of real property; utilizes spreadsheet software to input, maintain and analyze data.

7. Learns to explain appraisal and assessment procedures; responds to inquiries from the general public and property owners regarding property assessment matters.

7-8. Interacts with members of the public, City staff of other departments and City officials during the course of business.

8. Performs other duties as required

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of:

- Modern office procedures, methods, and equipment including computer equipment;
- Basic business letter writing and report preparation principles and techniques;
- English usage, spelling, grammar, and punctuation;
- Word processing and spreadsheet programs.

Skill and Ability to:

- Learn real property appraisal methods, theory, practices and procedures used in establishing current value accessibility for all types of real property;
- Learn market, cost and income valuation approaches;
- Learn government codes, regulations and laws, as they apply to appraisal of real property for tax assessment purposes;
- Learn methods and techniques used to analyze and draw conclusions regarding market and building trends from general economic data;
- Learn economic factors relating to property values;
- Learn the theory, methodology, practices and procedures involved in the appraisal of real property for tax assessment valuation purposes;
- Learn, analyze, interpret and explain laws, regulations and policies governing appraisal program operations;
Learn to collect information necessary for the correct appraisal of real property;

Learn to analyze and interpret data/information extract and interpret information from a variety of sources such as blueprints, sketches, legal property descriptions, charts, tables and socio-economic trends in order to determine proper tax assessment valuations;

Learn to identify and recommend reasonable conclusions and/or courses of action;

Prioritize multiple assignments in order to meet deadlines;

Interact effectively, tactfully and courteously with the general public, co-workers, supervisors and other departmental personnel; and members of official bodies; all persons encountered during the course of business;

Effectively present, explain and discuss appraisal information and property tax rules with the general public;

Establish and maintain effective and cooperative working relationships with all persons encountered during the course of business;

Perform simple mathematical calculations such as addition, subtraction, multiplication, division and computing percentages and measurements;

Apply basic arithmetic skills to calculate property value;

Learn to accurately prepare electronic notes and written, clear and accurate reports, records and other documents related to the appraisal of real property for tax assessment purposes with clear and concise information including narrative writing;

And learn to use computer software programs to enter, store, retrieve, update and work with data relevant to the appraisal and assessment of residential and commercial property.

Use a computer to research and process information, enter appraisal data into database and prepare correspondence and reports.

In addition to following standard office procedures, employees in this classification may be required to conduct visits to construction sites to obtain appraisal information. Employees may occasionally be exposed to various hazards that exist at construction sites, as well as exposure to the outdoors in unfavorable weather conditions. The duties of this class require extensive use of personal computers with various software applications. Employees are required to drive their own vehicles to job sites.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:

Requires a baccalaureate degree from an accredited college or university. Additional relevant experience in the appraisal of real property, building, cost estimating, engineering, and accounting or in buying, selling or managing real estate, or in a related area as defined by the State of California, see the note below, may be substituted for the education on a year for year
Title: Real Property Appraiser Trainee  
Job Code: 4260

Education:  
One (1) year of education is equivalent to either thirty (30) semester units or forty-five (45) quarter units.

1. Possession of a baccalaureate degree from an accredited university or college, preferably with major coursework in business, finance, accounting, engineering, real estate or closely related field; OR

2. High School graduation (or possession of a GED) and four (4) years of full-time relevant experience as described in the note below; OR

3. Any combination of the equivalent of four (4) years of relevant experience and education in an accredited institution of higher education. When fewer than four (4) years of education in an accredited institution of higher education are used to meet the minimum qualifications, the number of qualifying years or fractions thereof shall be determined by the number of units in which passing grades were received. One (1) year of education requirement shall consist of either 30 semester units or 45 quarter units. AND

4. Possession of a valid Driver License. (to be presented at time of hiring)

Experience:

No experience is required.

NOTE: Education Substitution

Relevant experience as referenced above means employment experience within the last ten (10) years in any of the following occupations:

A. Experience as an accountant-auditor, real property appraiser, building cost estimator, engineer, real estate loan agent, real estate loan underwriter, right-of-way agent, licensed building contractor; OR

B. Experience as a real estate licensee, licensed by the California Department of Real Estate, engaged in buying, selling, leasing or managing real estate; OR

C. Experience as an Appraiser's Aide or Appraiser Trainee in an assessor’s office or the Property Tax Department of the California State Board of Equalization; OR

D. Experience as an employee, other than an Appraiser, Appraiser Aide, or Appraiser Trainee, of an assessor’s office or of the Property Tax Department of the California State Board of Equalization, except that such employment time shall be of limited to qualifying for only two-thirds of the four-year experience requirement. The remaining one-third of time shall be accumulated by other relevant experience as described in subparagraphs (A), (B), and (C) above or by education in an accredited institution of higher education.

LICENSE AND CERTIFICATION

Possession of a valid driver license; AND
2. In accordance with the requirements of Eligibility for certification from the California State Board of Equalization as an appraiser for property tax purposes, In accordance with, appointees to this class must qualify for and receive a permanent Appraiser's certificate issued by the California State Board of Equalization, appointees to this class, must possess or obtain permanent certification as an appraiser for property tax purposes, within one (1) year of appointment. California State law requires continuing education to maintain the Appraiser's certificate and must maintain certification as a condition of continued employment.

PROMOTIVE LINES

To: 4261 Real Property Appraiser
From: Entrance examination

| ORIGINATION DATE: | 08/4/75 |
| AMENDED DATE: | 10/22/99 |
| 12/08/09 |
| 10/xx/11 |

REASON FOR AMENDMENT
To accurately reflect the current minimum qualifications, tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

BUSINESS UNIT(S): COMMN SFCCD SFUSD
INTRODUCTION
Under general supervision, a Real Property Appraiser performs responsible professional appraisal work in connection with examining, analyzing and evaluating real property of moderate complexity for tax assessment purposes.

DISTINGUISHING FEATURES
The 4261 Real Property Appraiser is the journey level class in the professional appraisal series and performs the full range of moderately complex appraisal duties within a framework of established procedures working independently with only occasional instruction or assistance responsible, under general supervision, for examining, analyzing and evaluating real property for tax assessment purposes. This class is distinguished from Class 4260 Real Property Appraiser Trainee in that the latter is an entry-level trainee position responsible for performing simple and routine appraisals under immediate supervision. This class is further distinguished from the 4265 Senior Real Property Appraiser in that the latter performs more complex appraisal work and may lead the work of subordinate staff engaged in appraisal activities.

SUPERVISION EXERCISED: None.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES
According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Appraises all classes of moderately complex real property, including various types of residential properties, such as including dwellings, condominiums, cooperatives and apartment complexes, as well as commercial and industrial properties, such as including office buildings, hotels, motels, shopping centers, industrial warehouses and manufacturing facilities, to establish values for tax assessment purposes, and to make and recommend changes to valuation.

2. d) Estimates value of real property by conducting site inspections and use of standardized market, cost and income valuation approaches approaches to value (market, cost and income), including evaluation of land sales, improvement costs, market information and information gained during site visits, in order to estimate the taxable value of properties within a district.

3. a) Gathers and analyzes data related to land and improvements information from a varied variety of sources, including reviewing property statements, leases, sales, income/expense, cost, market data and interviewing property owners and reviewing charts and tables in order to maintain current information on real property, estimate taxable values.

b) Gathers and analyzes sales data, market transactions, income/expense, cost and other market data; reviews leases, rentals and trust deeds in order to estimate taxable value of income-producing real property.

c)  

4. Makes site visits of properties to be appraised in order to gather information, such as building class, use, construction quality and type, in order to estimate taxable value of
Title: Real Property Appraiser  
Job Code: 4261  

1. Investigates complaints on property assessments; by interviewing taxpayers, conducting on-site visits, and researching records and reports in order to make recommendations regarding the resolution of such complaints; to supervisor for changes in valuation; explain findings to property owners;  
2. Perform special investigations and appraisal surveys, such as commercial area rent surveys.  
3. Evaluates property upon change in ownership and recommends changes in valuation to supervisor, both verbally and in writing, to maintain an equitable basis for assessment of property;  
4. g) Separates land and improvement values for assessment roll as required by revenue and taxation code; reconciles land and improvement valuations in establishing equity in assessments.  
5. Prepare appeal packages for properties under assessment appeal; testify and or present before Assessment Appeals Board; may present at other quasi-judicial bodies. Appears as expert witness before quasi-judicial bodies, such as the Assessment Appeals Board, in order to answer questions on assessment issues.  
6. Prepare and maintain various records and reports, including those. Compiles and records data related to appraisal of real property, including narrative reports, charts, tables, detailed property descriptions, measurements and classification of improvements. The majority of these tasks are completed utilizing computer software programs.  
7. Performs special investigations and appraisal surveys, such as rent surveys in commercial areas.  
8. Explains appraisal and assessment procedures to homeowners, taxpayers, property owners and general public.  
9. Interact with members of the public, City staff of other departments and City officials during the course of business.  
10. Maintains professional certification and competency by completing 24 hours of State approved appraisal courses annually.  
11. Performs other duties as required.  

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of:

- Real property appraisal methods, theory, practices and procedures used in establishing current value accessibility for all types of real property;  
- Market, cost and income valuation approaches;  
- Government codes, regulations and laws, including the Revenue and Taxation Code, relevant
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Portions of the State Constitution, zoning laws and other laws and regulations as they apply to appraisal of real property for tax assessment purposes;

Methods and techniques used to analyze and draw conclusions regarding market and building trends from general economic data; methods, procedures, and terminology used in establishing current value of all types of real property; the effect of economic trends on the value of existing real property and the cost of new construction and renovation;

Economic factors relating to property values;

Modern office procedures, methods, and equipment including computer equipment;

Basic business letter writing and report preparation principles and techniques;

English usage, spelling, grammar, and punctuation;

Word processing and spreadsheet programs;

Skill and Ability to:

Identify and assemble relevant data and extract, evaluate and interpret information required to determine proper tax assessment valuations;

Understand, interpret and explain laws, regulations and policies governing appraisal program operations;

Analyze and interpret data/information to determine tax assessment valuations;

Identify and recommend reasonable conclusions and/or courses of action;

Prioritize multiple assignments in order to meet deadlines;

Apply basic arithmetic skills to calculate property value; prepare clear, concise and accurate technical reports, records, narratives, memos, and recommendations;

Interact effectively, tactfully and courteously with the public and members of official bodies all persons encountered during the course of business;

Establish and maintain effective and cooperative working relationships with all persons encountered during the course of business; clearly and effectively communicate work-related information to the public, departmental staff, representatives of other agencies, organizations and official bodies;

Listen and elicit Collect information necessary for the correct appraisal of real property;

Prepare clear, concise and accurate reports, records, and other documents related to the appraisal of real property for tax assessment purposes;

Use a computer to research and process information, enter appraisal data into database and prepare correspondence and reports extract, record, and process information.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special
Experience: Training and Certification Guidelines:

Education:

Requires a baccalaureate degree from an accredited college or university. Additional relevant experience in the appraisal of real property, building, cost estimating, engineering, and accounting or in buying, selling or managing real estate, or in a related area as defined by the State of California, see the note below, may be substituted for the education on a year for year basis. One (1) year of education is equivalent to either thirty (30) semester units or forty-five (45) quarter units.

Experience:

1A. One (1) year (2000 hours) of verifiable experience in the past 10 years appraising real property in a County Assessor's Office for tax assessment purposes; OR

1B. Three (3) years (6000 hours) of verifiable experience in the past 10 years appraising real property as a fee, institutional or government appraiser. — AND —

2. Possession of a baccalaureate degree from an accredited four-year college or university. Applicants who do not possess a baccalaureate degree may substitute relevant, verifiable experience for the college degree on a year for year basis, with one year (2000 hours) of qualifying experience equivalent to 30 semester units or 45 quarter units. Relevant work experience may include additional experience as described in 1A or 1B above, as well as other real estate related activities such as building cost estimating, structural engineering, accounting, auditing, or working as a real estate broker licensed by the State of California with buying, selling, leasing or managing functions;

NOTE: Education Substitution

Relevant experience as referenced above means employment experience within the last ten (10) years in any of the following occupations:

A. Experience as an accountant-auditor, real property appraiser, building cost estimator, engineer, real estate loan agent, real estate loan underwriter, right-of-way agent, licensed building contractor; OR

B. Experience as a real estate licensee, licensed by the California Department of Real Estate, engaged in buying, selling, leasing or managing real estate; OR

C. Experience as an Appraiser's Aide or Appraiser Trainee in an assessor's office or the Property Tax Department of the California State Board of Equalization; OR

D. Experience as an employee, other than an Appraiser, Appraiser Aide, or Appraiser Trainee, of an assessor's office or of the Property Tax Department of the California State Board of Equalization, except that such employment time shall be of limited to qualifying for only two-thirds of the four-year experience requirement. The remaining one-third of time shall be accumulated by other relevant experience as
CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES

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described in subparagraphs (A), (B), and (C) above or by education in an accredited institution of higher education.

LICENSE AND CERTIFICATION

Possession of a valid driver's license; AND

Eligibility for certification from the California State Board of Equalization as an appraiser for property tax purposes. In accordance with the California State Board of Equalization, appointees to this class must possess or obtain permanent certification as an appraiser for property tax purposes, within one (1) year of appointment, and must maintain certification as a condition of continued employment. 4. Permanent certification from the California State Board of Equalization as an appraiser for property tax purposes.

PROMOTIVE LINES

To: 4265 Senior Real Property Appraiser
From: 4260 Real Property Appraiser Trainee

ORIGINATION DATE: 6/23/66
AMENDED DATE: 10/22/99

REASON FOR AMENDMENT:

To accurately reflect the current minimum qualifications, tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

BUSINESS UNIT(S): COMMN SFCCD SFUSD
INTRODUCTION

Under direction in the Assessor/Recorder’s Office, the Senior Real Property Appraiser performs and may lead staff in the performance of responsible appraisal work in connection with examining, analyzing and evaluating all types of complex real property for tax assessment purposes.

Essential functions include: appraising all types of real property, particularly high-value, multi-unit, income-producing residential properties and large commercial and industrial properties; analyzing a variety of appraisal-related information; making and recommending changes in valuation; compiling and recording data and preparing reports related to the appraisal of real property; performing special investigations and surveys; investigating complaints on assessments; explaining assessment procedures to the public; appearing as an expert witness before the Assessment Appeals Board and other quasi-judicial bodies in order to testify as to the value of real properties and other assessment issues in compliance with the Revenue and Taxation Code; assisting in the training of new appraisers; interacting with other City departments; and performing related duties as required.

Incumbents may act as the lead worker within a group of professional appraisers, use a PC to access data and complete work assignments, visit field sites to obtain information for appraisal purposes and may be required to drive their own vehicle.

DISTINGUISHING FEATURES

This is the senior level in the Real Property Appraiser series, performs the more complex appraisal work and may lead the work of subordinate staff engaged in appraisal activities. It is distinguished from the 4261 Real Property Appraiser in that the latter performs the full range of appraisal duties within a framework of established procedures as the journey level in the series and does not perform lead worker responsibilities. It is further distinguished from the 4267 Principal Real Property Appraiser by the latter's broader supervisory duties and responsibility for performing more difficult and complex appraisal work.

SUPERVISION EXERCISED:

May act as a lead worker to 4261 Real Property Appraisers and 4260 Real Property Appraiser Trainees subordinate professional, technical and clerical employees involved in real property appraisal.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. May act as lead worker in an assigned area by providing technical expertise, assisting with training, and reviewing the appraisal and valuation recommendations of less experienced appraisal personnel.

2. Appraises all various types of complex real property, including high-value, multi-unit, income-producing residential properties and large commercial and industrial real properties. This includes complex and/or specialized units such as condominiums, apartment complexes, cooperatives, large shopping centers and industrial plants to establish values for tax assessment purposes, and to make and recommend changes in valuation.

3. Estimates property value by conducting site inspections and using standardized market and
Title: Senior Real Property Appraiser  
Job Code: 4265

Cost and income valuation approaches comparing land sales, improvement costs, market information, and income data and by making site visits in order to estimate the taxable value of properties within a district in compliance with the Revenue and Taxation Code. Explains appraisal and assessment procedures to property owners; makes and recommends changes in valuations.

3. Gather and analyzes information received from a variety of sources in order to maintain information on real property, including property statements and interviews with property owners, for taxation purposes and in order to update information on real property.

4. Analyzes sales and other economic factors within assigned districts by reviewing leases, income, sales and market data for taxation purposes.

5. Investigates property owner assessment complaints on property assessments by property owners by interviewing property owners, conducting site visits and researching records and reports; makes recommendations for resolving such complaints and prepares related reports and records; explains findings to property owners; performs special investigations and appraisal surveys.

6. Performs special investigations and appraisal surveys, such as rental surveys in commercial areas and specialized surveys of commercial, industrial and residential income-producing properties.

7. Prepares appeal packages for properties under assessment appeal; testifies and/or presents before the Assessment Appeals Board; may present at other quasi-judicial bodies. Appears as an expert witness before the Assessment Appeals Board and other quasi-judicial bodies in order to testify as to the value of real properties and other assessment issues in compliance with the Revenue and Taxation Code.

8. Prepares and maintains various records and reports, including those related to appraisals of real property.

9. May act as lead worker in an assigned area by providing technical expertise and by assisting in the training and reviewing the appraisal and valuation recommendations of new appraisal personnel.

10. Drives a vehicle to appraisal sites in order to assure the timely completion of assigned tasks.

11. Explains appraisal and assessment procedures to property owners and general public.

12. Interacts with members of the public, City staff of other departments and City officials during the course of business; staff of other City departments, e.g. Tax Collector, Controller, Building Inspection and City Attorney, in order to resolve complex assessment issues.

Utilizes a personal computer to extract information needed for the completion of assigned tasks, as well as for report writing and correspondence.

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES
Title: Senior Real Property Appraiser  
Job Code: 4265

Knowledge of:

- methods, procedures and terminology used in establishing current value for all types of real property
- Real Property Appraisal methods, theory, practices and procedures used in establishing current value accessibility for all types of real property; methods for evaluating building class, use, quality of construction, business properties, deeds, leases and contracts;
- market, cost and income approaches to valuation approaches;
- government codes, regulations and laws, including the Revenue and Taxation Code, relevant portions of the State Constitution and zoning laws as they apply to appraisal of real property for tax assessment purposes;
- Methods and techniques used to analyze and draw conclusions regarding market and building trends from general economic data; effect of economic trends on the value of existing real property, the cost of new construction and renovations, and income capitalization techniques
- Economic factors relating to property values;
- Modern office procedures, methods, and equipment including computer equipment;
- Basic business letter writing and report preparation principles and techniques;
- English usage, spelling, grammar, and punctuation;
- Word processing and spreadsheet programs.

Skill and Ability to:

- identify and assemble relevant data; extract and interpret information from various sources; evaluate information and reach an appropriate conclusion and/or adopt a reasonable course of action in order to determine proper tax
- Understand, interpret and explain laws, regulations and policies governing appraisal program operations;
- Analyze and interpret data/information to determine tax assessment valuations;
- Identify and recommend reasonable conclusions and/or courses of action;
- Prioritize multiple assignments in order to meet deadlines;
- Apply basic arithmetic skills to calculate property value;
- Lead the work of others engaged in appraisal activities; effectively communicate work-related information to the public, departmental staff, representatives of other agencies, organizations and
- Interact effectively, tactfully and courteously with the public and members of official bodies all persons encountered during the course of business;
- Establish effective and cooperative working relationships with all persons encountered during
Title: Senior Real Property Appraiser  
Job Code: 4265

Prepare clear, concise and accurate technical reports, records, instructions, memos, correspondence and other documents related to the appraisal of real property for tax assessment purposes;

Use a computer to research and process information, enter appraisal data into database and prepare correspondence and reports.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Education:

Requires a baccalaureate degree from an accredited college or university. Additional relevant experience in the appraisal of real property, building, cost estimating, engineering, and accounting or in buying, selling or managing real estate, or in a related area as defined by the State of California, see the note below, may be substituted for the education on a year for year basis. One (1) year of education is equivalent to either thirty (30) semester units or forty-five (45) quarter units.

Experience:

Three (3) years verifiable experience appraising real property in a County Assessor’s Office for tax assessment purposes, including one (1) year appraising income-producing residential, commercial and industrial properties equivalent to the level of experience gained in Job Code City and County of San Francisco class 4261 Real Property Appraiser will be considered qualifying;

OR

Five (5) years verifiable experience appraising real property as a fee, institutional or government appraiser, including two (2) years appraising income-producing residential, commercial and industrial properties equivalent to the level of City and County of San Francisco class 4261 Real Property Appraiser; AND

2) Possession of a baccalaureate degree from an accredited college or university

SUBSTITUTION: Applicants who do not possess a baccalaureate degree may substitute additional qualifying experience for up to two years of the required college work on a year-for-year basis, with one year of qualifying experience equivalent to 30 semester units or 45 quarter units.

NOTE: Education Substitution

Relevant experience as referenced above means employment experience within the last ten
Title: Senior Real Property Appraiser  
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(10) years in any of the following occupations:
A. Experience as an accountant-auditor, real property appraiser, building cost estimator, engineer, real estate loan agent, real estate loan underwriter, right-of-way agent, licensed building contractor; OR
B. Experience as a real estate licensee, licensed by the California Department of Real Estate, engaged in buying, selling, leasing or managing real estate; OR
C. Experience as an Appraiser’s Aide or Appraiser Trainee in an assessor’s office or the Property Tax Department of the California State Board of Equalization; OR
A-D. Experience as an employee, other than an Appraiser, Appraiser Aide, or Appraiser Trainee, of an assessor’s office or of the Property Tax Department of the California State Board of Equalization, except that such employment time shall be of limited to qualifying for only two-thirds of the four-year experience requirement. The remaining one-third of time shall be accumulated by other relevant experience as described in subparagraphs (A), (B), and (C) above or by education in an accredited institution of higher education.

LICENSE AND CERTIFICATION

Possession of a valid driver’s license; AND
Eligibility for certification from the California State Board of Equalization as an appraiser for property tax purposes. In accordance with the requirements of the California State Board of Equalization, appointees to Job Code 4265 Senior Real Property Appraiser, must possess or obtain permanent certification as an appraiser for property tax purposes, within one (1) year of appointment, and must maintain certification as a condition of continued employment.

PROMOTIVE LINES

To: 4267 Principal Real Property Appraiser
From: 4261 Real Property Appraiser

ORIGINATION DATE: 3/9/67
AMENDED DATE: previously amended 09/13/71 03/08/02 10/xx/11
REASON FOR AMENDMENT: To accurately reflect the current minimum qualifications, tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.
BUSINESS UNIT(S): COMMN SFCCD-SFUSD
INTRODUCTION

Under general direction in an assigned area of activity, is responsible for the appraisal of all real property for tax purposes; performs unusual or difficult appraisal work; supervises the activities of subordinate personnel engaged in such work; and performs related duties as required.

Requires responsibility for: Assisting in coordinating, interpreting and enforcing existing evaluation methods and procedures in connection with real property appraisal activities; making regular contact with the general public, outside organizations and their representatives in furnishing and obtaining information on real property appraisals and tax assessment matters; preparing and reviewing detailed appraisal reports and records.

DISTINGUISHING FEATURES

Positions in this classification are distinguished from the 4265 Senior Real Property Appraiser class by its administrative and management supervisory responsibility for a group of Real Property Appraisers at the trainee, journey and senior levels and technical and clerical assessment staff. Principal Real Property Appraisers manage also are responsible for the more difficult appraisal and assessment work, and assist in the development of new policies and procedures for appraisals and assessments. Principal Real Property Appraisers receive administrative and technical direction from Chief Appraisers.

SUPERVISION EXERCISED: Supervises Real Property Appraisers at the trainee, journey and senior levels and technical and clerical assessment staff.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

EXAMPLES OF DUTIES:

1. Plans, lays out and assigns work of subordinate appraisers in an assigned area; reviews and evaluates appraisal and valuation conclusions of subordinates.

2. Personally performs appraisals on problematical or unusual properties within an assigned area; analyzes and interprets leases and financial statements pertaining to tax exempt property.

3. Assembles and analyzes various data applicable to the valuation of real property.

4. Reviews and analyzes effect of income-producing personal or intangible assets in relation to the assessment of high value real property; may survey tax exempt property in connection with possessor interest assessments.

5. Coordinates area or unit activities with those of adjoining areas or districts; prepares and reviews appraisal and progress reports.

6. Confers with taxpayers and/or their representatives for the purpose of resolving valuation problems and explaining the policies and procedures of the Assessor's office.
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7. Represents the Assessor before the Assessment Appeals Board; required to appear as an expert witness before quasi-judicial and judicial bodies relative to specific appraisal and valuation conclusions.

8. Assists in the professional advancement of subordinate appraisal personnel.

1. Manage Supervise the work of senior, journey level and trainee Real Property Appraisers engaged in appraisal and assessment work, change in ownership, assessment and exemptions of all real property within an assigned area of activity by planning, coordinating and monitoring overall team/section workload and productivity to ensure maximum productivity, timely completion of all work, and compliance with Real Property productivity standards. This includes ongoing work, projects and special assignments.

2. Provide effective, innovative, and consistent supervision and management. Coach and develop staff, oversee training activities. Clearly define and articulate functional responsibilities and procedures in the delegation of assignments. Provide guidance and support; when indicated, take corrective action to ensure that productivity standards for individual team members and the team are met. Foster safe, comfortable and professional work environment for department employees. This includes ensuring that all team members adhere to office policies on attendance, time recording, and office ethics.

3. Apply Interpret and enforce existing tax laws and statutes and assessment methods and procedures; interpret the ramifications of current assessment legislation in connection with real property appraisal activities; explain the above to subordinates, representatives of other departments and the general public.

4. Advise Assessor, Deputy Recorder, Deputies, Chiefs, and Senior Managers in establishing procedures, interpreting legislation and setting department goals. Assist in evaluating, developing and implementing policies and procedures for real property appraisal work, change in ownership, and exemption in order to improve department operations and productivity.

5. Review and approve all real property valuations, pursuant to the Revenue and Taxation Code, SBE Rules, Standards guidelines, manual, office policies and procedures; review developed income multipliers for multi-unit income-producing residential properties and derived capitalization rates for commercial sales; review and approve completed parcel management; review all lien date progress assessment valuations; and review all direct enrollments in appraisers’ assigned workload.

6. Resolve valuation problems by reviewing complaint investigations performed by subordinates and by conferring with taxpayers and their representatives in order to determine and explain changes in valuation, ownership and exemption.

7. Perform appraisals on complex properties; perform difficult special investigations and surveys related to determine assessability of complex transactions, corporate acquisitions, and mergers.

8. Maintain accurate, timely, and automated appraisal data, and report status and progress on goals and objectives. Provide status of appraiser production relative to interim and long term goals as requested by management. Verify that appraisers prepare and maintain supporting documentation and data on valuations in either Easy Access or hard copy in file. May
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- Prepare technical reports, records, instructions, memos, correspondence, progress reports and other documents related to the appraisal of real property for tax assessment purposes. Respond to taxpayer and inter-City correspondence.

9. Interact with other agencies and City departments in order to resolve complex assessment issues and assure uniformity of assessment standards.

10. Represent the Assessor before the Assessment Appeals Board, and/or appear as an expert witness before judicial and quasi-judicial bodies in order to answer questions on assessment issues; make public presentations; may prepare and present at an Assessment Appeals Board testimony, oral arguments, and cross-examination of applicant; and assist City Attorney in writing legal findings of fact. May represent the office at public forums, taxpayer fairs, professional or accountant's appraiser organizations, etc.

11. Maintain professional certification and competency by completing legally required hours of State approved appraisal courses annually. Ensure that all assigned staff complete training requirements and maintain professional certification and competency.

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge, Abilities and Skills:
Requires considerable knowledge of the methods and practices utilized in the appraisal of land and improvements, including residential, commercial and industrial properties; the practices of structural cost estimating on residential, commercial and industrial improvements; revenue and taxation codes as applied to the appraisal of land and improvements.

Required to complete 24 hours of State approved appraisal training annually.

Requires considerable ability to: Analyze and interpret economic and environmental factors affecting land and improvement values; analyze and evaluate a variety of data on parcels of land and/or improvements and draw logical conclusions therefrom; prepare and maintain complete and accurate records of land and improvement appraisals; deal courteously, effectively and tactfully with the general public, outside organizations and their representatives.

Knowledge of:
- Real property appraisal methods, theory, practices and procedures utilized in establishing current value accessibility for all types of real property;
- Government codes, regulations, and laws as they apply to appraisal of real property for tax assessment purposes;
- Principals of change of ownership laws for property tax purposes; and knowledge of Economic factors relating to property values.

Skill and Ability to:
- Analyze and interpret data/information to determine tax assessment valuations;
- Prioritize, plan, coordinate and monitor the workload;
Train, coach and evaluate staff;
Interact effectively, tactfully and courteously with the public and members of official bodies all persons encountered during the course of business;
Establish effective and cooperative working relationships with subordinates, departmental staff and representatives of agencies and organizations;
Clearly, concisely and effectively communicate work-related information;
Prepare clear, concise and accurate technical reports, records, and other documents related to the appraisal of real property for tax assessment purposes;
Use a computer to research and process information, enter appraisal data into database and prepare correspondence and written reports.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license(s) which are required for employment in the classification. Please note, additional qualifications (i.e., special conditions) may apply to a particular position and will be stated on the exam/job announcement.

Training and Experience: Requires completion of a four year college or university with a baccalaureate degree with major course work in engineering, architecture, business administration, real estate or a closely related field, supplemented by special courses in appraisal of real estate and real property assessment.

Education:
Requires a baccalaureate degree from an accredited college or university. Additional relevant experience in the appraisal of real property, building, cost estimating, engineering, and accounting or in buying, selling or managing real estate, or in a related area as defined by the State of California, see the note below, may be substituted for the education on a year for year basis. One (1) year of education is equivalent to either thirty (30) semester units or forty-five (45) quarter units.

Requires four years of progressively responsible experience in the appraisal and evaluation of land, residential, commercial and industrial improvements, including one year of supervisory experience or an equivalent combination of training and experience.

Experience:
Four (4) years verifiable experience appraising real property in a County Assessor’s Office for tax assessment purposes equivalent to the level of City and County of San Francisco class 4265 Senior Real Property Appraiser, including two (2) years appraising income-producing residential, commercial and industrial properties equivalent to the level of City and County of San Francisco class 4265 Senior Real Property Appraiser;

OR

Six (6) years verifiable experience appraising real property as a fee, institutional or government
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Appraiser equivalent to the level of City and County of San Francisco class 4265 Senior Real Property Appraiser, including three (3) years appraising income-producing residential, commercial and industrial properties and (2) years appraising real property for tax assessment purposes equivalent to the level of City and County of San Francisco class 4265 Senior Real Property Appraiser.

NOTE: Education Substitution

Relevant experience as referenced above means employment experience within the last ten (10) years in any of the following occupations:

A. Experience as an accountant-auditor, real property appraiser, building cost estimator, engineer, real estate loan agent, real estate loan underwriter, right-of-way agent, licensed building contractor; OR

B. Experience as a real estate licensee, licensed by the California Department of Real Estate, engaged in buying, selling, leasing or managing real estate; OR

C. Experience as an Appraiser’s Aide or Appraiser Trainee in an assessor’s office or the Property Tax Department of the California State Board of Equalization; OR

A-D. Experience as an employee, other than an Appraiser, Appraiser Aide, or Appraiser Trainee, of an assessor’s office or of the Property Tax Department of the California State Board of Equalization, except that such employment time shall be limited to qualifying for only two-thirds of the four-year experience requirement. The remaining one-third of time shall be accumulated by other relevant experience as described in subparagraphs (A), (B), and (C) above or by education in an accredited institution of higher education.

LICENSE AND CERTIFICATION

License: Requires possession of a valid State Motor Vehicle Operator’s License, Possession of a valid driver license; AND Permanent certification from the California State Board of Equalization as an appraiser for property tax purposes must be obtained within one year of appointment.

Eligibility for certification from the California State Board of Equalization as an appraiser for property tax purposes. In accordance with the California State Board of Equalization, appointees to this class must possess or obtain permanent certification as an appraiser for property tax purposes, within one (1) year of appointment, and must maintain certification as a condition of continued employment.

PROMOTIVE LINES

To: 4269 Chief Real Property Appraiser 0923 Manager II, Chief Real Property Appraiser

From: 4265 Senior Real Property Appraiser

ORIGINATION DATE: ADOPTED: 3/9/67
Title: PRINCIPAL REAL PROPERTY APPRAISER
Job Code: 4267

AMENDED DATE: 9/13/71
AMENDED: 10/xx/11

REASON FOR AMENDMENT:
To accurately reflect the current minimum qualifications, tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.

BUSINESS UNIT(S): COMMN