



ASSESSMENT DISTRICT SPECIALIST

AGENCY/DEPARTMENT: Administrative Services/Fiscal Services

Approved By HR Director: *Linda Matthews*
Date Approved: 6-2-06
Date of Last Revision:

Reports to: Fiscal Services Director
Supervises: n/a

JOB SUMMARY: Under general supervision, performs technical and administrative services for the City's special tax and assessment districts, which provide funding for public improvements and services through the levy of special taxes and assessments; provides technical and administrative services facilitating the creation of special districts and the design and construction of the projects or services funded by the districts; and performs other related work as necessary.

EXAMPLES OF ESSENTIAL FUNCTIONS:

ANALYSIS AND REPORTING

1. Prepares detailed reports and calculations in response to inquiries from City administration, contract consultants, property owners, real estate brokers, appraisers, investors and government agencies regarding special taxes and assessments.
2. Prepares general administrative correspondence and City Council agenda reports for approval of the annual assessment levy.
3. Monitors special tax and assessment legislation.

LEVY OF SPECIAL TAXES AND ASSESSMENTS

4. Oversees preparation of annual assessment rolls, prepayment calculations, and amortization schedules. Coordinates placement of assessments and special taxes on the County tax rolls.
5. Monitors and coordinates transactions and accounting activities associated with the assessment/special taxes revenues, payments, and internal fund transfers.
6. Reviews County assessment reports and tax rolls; develops and implements alternative billing methods if County tax rolls cannot be utilized.
7. Monitors the collection of assessments and special taxes.
8. Prepares annual bond disclosure reports.
9. Coordinate preparation and routine monitoring of annual operating budgets for special districts.

SPECIAL DISTRICTS

10. Coordinates formation of special districts and the establishment of special tax and assessment rates and methods.
11. Monitors land division and development within the districts; collects, records and analyzes pertinent data required to apply the special tax and assessment formulae.
12. Acquires and records Assessor's parcels data and disseminates to the City's GIS and Planning Departments and contract consultants.
13. Coordinates and reviews preparation of assessment reapportionments and auditor's record.
14. Coordinates with other City departments, consultants, developers and other government agencies for new development related to special districts and the annexation of new territory to existing special districts.

QUALIFICATION GUIDELINES:

ANY COMBINATION OF EDUCATION AND/OR EXPERIENCE THAT PROVIDES THE REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES TO PERFORM THE ESSENTIAL FUNCTIONS OF THE POSITION. A TYPICAL COMBINATION INCLUDES:

EDUCATION: Equivalent to an associate's degree from an accredited college or university, including coursework in civil engineering, accounting, finance, or a related field.

EXPERIENCE: Four years of progressively responsible assessment district administration experience.

KNOWLEDGE OF:

- Applicable federal, state, and local regulations governing special tax and assessment districts.
- Creating moderately complex spreadsheets and reports using MS Word, Access, Excel, or other software application.
- Maintaining databases through data entry, data queries, and database design modifications.
- Developing an assessment payment tracking system.
- Civil engineering practices as related to assessment district administration.
- Fund accounting and generally accepted accounting principles.
- Public financing methods and practices.

ABILITY TO:

- Work independently with minimal direction.
- Perform highly accurate record keeping with strict attention to detail.
- Organize documents, materials, and data with efficiency and accuracy.
- Plan, schedule and prioritize tasks.
- Meet deadlines while managing multiple projects.
- Compose letters, memos, reports, and other written communication materials at a professional level.
- Read and understand complex and detailed documents such as proposals, contracts, policies, and procedures.
- Interact and communicate effectively both orally and in writing with citizens, property owners, staff, developers, engineers, construction contractors, contract consultants and others
- Establish, maintain, and foster positive, harmonious and effective working relationships.

LICENSES:

- Valid Class C CA driver license.
- Acceptable driving record at the time of appointment and throughout employment.

FLSA Exemption Status: Nonexempt

Employee Unit: # 5# Technical/Professional Services

Job Family: Fiscal Services

Date Class Established: November 13, 2005