

## PERSONNEL ADMINISTRATION COMMITTEE

Monroe County Courthouse, Room 306 100 W Kirkwood Avenue Bloomington, Indiana 47404 Office: 812-349-7312 CouncilOffice@co.monroe.in.us Peter Iversen, Chair Marty Hawk Geoff McKim

# PERSONNEL ADMINISTRATION COMMITTEE Tuesday, November 7, 2023 at 12:00 PM (Noon) HR-Council Conference Room and Zoom Connection

#### https://monroecounty-in.zoom.us/j/84089784609?pwd=bm05NUN3UU5NZjMxZUQ0b2ZGVE1ldz09

#### Meeting ID: 840 8978 4609 Password: 196896

- The public's video feed will be turned off by the Technical Services Department meeting administrator.
- The public will be able to listen and record.
- The public should raise their hand if they wish to speak during the public comment period.
- Below is the link for ZOOM Meeting Schedule of Monroe County Virtual Public Meetings for your convenience:

https://www.co.monroe.in.us/egov/apps/document/center.egov?view=item;id=10017

#### \* \* \* \* \* \* \*

"Anyone who requires an auxiliary aid or service for effective communication, or a modification of policies or procedures to participate in a program, service, activity of Monroe County, should contact Monroe County Title VI Coordinator, Angie Purdie, (812) 349-2550, <u>apurdie@co.monroe.in.us</u>, as soon as possible, but no later than forty-eight (48) hours before the scheduled event. Individuals requiring special language services should, if possible, contact the Monroe County Title VI Coordinator at least seventy-two (72) hours prior to the date on which the services will be needed. The meeting is open to the public."

#### 1. CALL TO ORDER

#### 2. ADOPTION OF AGENDA

- 3. CLERK'S OFFICE, Nicole Browne Review of WIS Recommendation
  - Election Supervisor

#### 4. ASSESSOR'S OFFICE, Judy Sharp Review of WIS Recommendation

- Personal Property Assessment Specialist/ Deputy
- Sales Disclosure Specialist
- Real Estate Reassessment Specialist
- Sales Disclosure Supervisor Deputy
- Assistant Administrator to PTABOA
- GIS Assessment Specialist/ Deputy
- Administrator to PTABOA
- Property Director

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11

#### 5. HEALTH DEPARTMENT, Lori Kelley

#### A. Review of WIS Recommendation

- Public Health Liaison

#### B. Request for Review and Reclassification

- Administrative Assistant
- Assistant Registrar
- Financial Manager
- Health Administrator
- Health Registrar

The Department is requesting the review and reclassification of five (5) positions due to a restructure of the administrative and Vital Recor's departments in order to ensure proper cross training.

#### 6. VETERAN'S AFFAIRS, Steven Miller Request to Update Job Description - Benefits Coordinator

The department is requesting to update a job description in order to elevate the position to a PAT A, standardize the workweek to 40 hours, and implement a title modification to Deputy Director/ Assistant Veteran Service Officer. The primary impetus behind this proposed transformation is to fortify the Department's capacity to extend and augment outreach endeavors, with the ultimate aim of providing an enhanced level of support to the esteemed veterans and their families. The Department firmly believes that the elevation of this position is essential to furnish the requisite expertise and assistance required to reach objectives. Furthermore, the proposed change in nomenclature aligns with a nationwide initiative to adopt the title of Assistant Veteran Service Officer for personnel who are veterans and have attained and sustained accreditation from various Veteran Service Organizations (VSO). The accreditation significantly enhances the Department's ability to serve clients and their families by granting access to critical VA and VSO resources, including websites and materials. This broader access facilitates a more comprehensive and effective approach to assisting clients.

#### 7. APPROVAL OF SUMMARY MINUTES AS PRESENTED

- October 3, 2023

#### 8. ADJOURNMENT

174

180

210

231

# Waggoner • Irwin • Scheele

& Associates INC

#### MEMORANDUM

**DATE:** October 23, 2023

TO: Kim Shell, County Council Administrator

FROM: Lori Seelen and Addie Rooker

SUBJECT: Classification Request – Clerk

As requested, Waggoner, Irwin, Scheele, and Associates (WIS) performed a desk audit and reviewed the job description and classification request for the Clerk's Elections Supervisor.

#### **Elections Supervisor**

As requested by the County, a phone desk audit was conducted on July 12, 2023 with the Clerk's Chief Deputy and County Attorney. The purpose of the audit was to verify the duties and responsibilities of the Elections Supervisor position. Information provided during the audit stated that the position has been vacant since February 2023 due to the low pay, and the Chief Deputy has taken on the duties of the position. The position is currently classified as COMOT C Non-exempt. The job description has been updated and the position is responsible for supervising and overseeing the operations of elections and registration, ensuring registration activities, recordkeeping, and services comply with state and local policies and regulations. Incumbent reports directly to the Clerk and/or Chief Deputy.

The job duties of the position have been revised, clarified, and updated to better reflect the responsibilities of the position. According to the desk audit the position is directly responsible for supervising 2 full-time and 2 part-time staff members; Coordinating election database setup and testing; Maintaining voter registration database; Designing, printing, and proofing ballots pursuant to Indiana election law; Notifying candidates and office holders of upcoming state deadlines; Keeping candidate records orderly and properly destroying records as per state's course of action; Maintaining list of all city, county, state, and federal elected officials; and performing recount duties as required.

Job requirements for this position have been updated from: High school diploma or HSE to Associate's degree with additional training and coursework in business administration, or a related field supplemented by up to two years of previous experience and/or training involving voter registration or any equivalent combination of education, training, and experience which provides the requisite knowledge, skills, and abilities for this job; and Bachelor's degree preferred.

We have assessed this position respective of other positions in both the COMOT and PAT job categories and re-factored the position using the Factor Evaluation System (FES) job classification point-factor guide charts for PAT and COMOT positions.

**Recommendation:** The department is requesting the position be reclassified to PAT B or C in order to set a higher salary that will attract an applicant willing to work in a high stress position. However, the scope of duties and responsibilities fit best within the COMOT job category. We factored the position at 520 COMOT factor points. Therefore, it is recommended the position be reclassified at COMOT D Non-exempt.

#### **POSITION DESCRIPTION COUNTY OF MONROE, INDIANA**

<b>POSITION:</b>	Elections Supervisor
<b>DEPARTMENT:</b>	County Clerk
WORK SCHEDULE:	As Assigned
WEEKLY HOURS:	35 Hours
<b>JOB CATEGORY:</b>	<b>COMOT D</b> ( <i>Computer, Office Machine Operation, Technician</i> )

DATE WRITTEN:	January 2011	STATUS: Full-time
DATE REVISED:	February 2021, October 2023	FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job unless those accommodations would present an undue hardship.

Incumbent serves as Elections Supervisor for the Monroe County Clerk's Office and Voter Registration Department, responsible for supervising and overseeing the operations of elections and registration for the county while ensuring registration activities, recordkeeping, and services comply with state and local policies and regulations.

#### **DUTIES**:

Supervises assigned personnel, including orienting new subordinates in the department, analyzing staffing needs, recommending increases/decreases in staff, assisting in interviewing applicants for job openings, providing training, making hiring recommendations, and keeping supervisor and staff updated of organizational developments as needed.

Plans, directs, and supervises the daily activities of the Elections Division, election night operations, and post-election activities for County Elections, including recounts, answers inquiries, providing information, and resolving complaints regarding election operations and logistics.

Coordinates election database setup and testing and maintains voter registration database, including issuing and accepting voter registration affidavits, entering voter registrations into SVRS computer system, conducting voter file purges, preparing Reports of Registrations for the Secretary of State, researching potential registration fraud for referral to District Attorney and Secretary of State, and maintaining voter history files.

Provides laptops, registration e-books, IT support, forms, supplies and signage to each polling location on Election Day. Delivers, sets up and retrieves voting equipment for each polling location. Tests voting equipment and programs and ballot tabulation equipment prior to each election.

Supervises, trains, directs, and coordinates trainers, employees and procedures in the areas of Early Voting and Election Day poll worker recruitment and training, polling location identification sites and logistics, Absentee Overseas and Military voting, Absentee Mail voting, and Absentee In-Person voting, and voter and community outreach in compliance with State laws.

Designs, prints, and proofs ballots pursuant to Indiana election law. Verifies signatures on vote-by-mail ballots and initiative petitions and certifying results to state. Ensures accuracy of hard cards, mail ballots, sample ballots, and sample labeling, assists in developing election calendars, and monitors details to ensure that deadlines are met.

Notifies candidates and office holders of upcoming state deadlines by email, telephone, and letter. Supports all the candidates, PACs, and committees by providing forms, guidelines, and assistance in their process. Processes all Campaign Finance Reports for candidates, PACs, and committees. Keeps track of deadlines, reports missed deadlines to County Election Board.

Implements and maintains internal procedures, recommends and changes procedures to maintain an effective workflow process, and provides technical experience with on-line computer systems. Generates election reports as required by management and Indiana Election Division.

Maintains permanent, military, and overseas absent voter database, processing absentee ballot applications and verifying validity of returned duplicates, damaged, and provisional ballots, performing absentee ballot reconciliation, and researching potential voter fraud for referral to District Attorney.

Implements security measures and ensures a safe and secure election including securing election equipment and ballots in a locked capacity and reporting any security breach to Secretary of State as required.

Maintain convenient and accessible polling places for Early Voting and Election Day ensuring all polling sites are HAVA compliant. Finds new polling sites to present to county election board when needed. Recruits and trains poll workers for Early Voting and Election Day.

Maintains voter registration records through SVRS including transfers, deaths, BMV records, merges, and verifying new addresses.

Verifies local, state, and federal petition signatures, and addresses, and are registered voters for initiative and candidate qualifying petitions. Keeps candidate records orderly. Properly destroys records as per the state's course of action. Provides local candidate information to the public.

Keeps an accurate list of all city, county, state, and federal elected officials updating for caucuses and working with party chairs for results of caucus procedures. Prepares and prints oaths of office and certification of elections for every advancing candidate.

Works with the County GIS Coordinator, County Surveyor, Ellettsville Town Planner, County Attorney, and City GIS Manager to coordinate maps and county app. Establishes precinct boundaries as required by law, and appropriately assigns voters to precincts.

Monitors changes in laws, legal requirements, and services affecting division operations, working with Chief Deputy and County Clerk to effectively assess operations and develop, revise, and implement new procedures accordingly.

Keeps track of office supplies and working with election vendors to maintain inventory.

Conducts weekly staff meetings, state and local election board meetings, facilitating roll call and taking minutes at election meetings as assigned.

Attends Board of Commissioner meetings and state and local election board meetings.

Speaks to schools, and other community organizations on election processes and attends community events to register voters and provides election information.

Performs related duties as assigned.

# I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

Associate's degree required with additional training and course work in business administration, or a related field supplemented by up to two years of previous experience and/or training involving voter registration or any equivalent combination of education, training, and experience which provides the requisite knowledge, skills, and abilities for this job. Bachelor's degree preferred.

Thorough knowledge of standard policies, practices, and legal requirements of the Clerk's Office and civil operations, with ability to effectively maintain general operations, respond to inquiries, take payments, and design and apply appropriate procedures accordingly.

Knowledge of legal terminology and standard policies and procedures concerning preparation and filing of court documents, with ability to effectively retrieve, update, and review department files for accuracy and completeness.

Working knowledge of standard bookkeeping and receipting procedures, with ability to perform arithmetic calculations and maintain accurate accounts and records as required.

Ability to perform the statutory duties as prescribed for the County Clerk's Office as authorized by the Clerk.

Working knowledge of Standard English grammar, spelling and punctuation, and ability to prepare correspondence, court/legal documents, and written reports as required.

Ability to properly operate standard office equipment, such as computer, calculator, telephone, copier, microfilm reader, and fax machine.

Ability to supervise personnel, including orienting new subordinates in the department, analyzing staffing needs, recommending increases/decreases in staff, assisting in interviewing applicants for job openings, providing training, making hiring recommendations, and keeping supervisor and staff updated of organizational developments as needed.

Ability to effectively communicate orally and in writing with co-workers, other County departments, court personnel, State Health Department, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to provide public access to or maintain confidentiality of Department information and records according to state requirements.

Shall comply with all employer and Department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to compile, analyze, evaluate data, and make determinations.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to file, post, mail materials, and maintain accurate and organized records and files.

Ability to work alone with minimum supervision and with others in a team environment, often under time pressure, and on several tasks at the same time.

Ability to occasionally work extended hours and travel out of town for training/conferences sometimes overnight and responding to emergencies for elections on a 24-hour basis.

# II. <u>RESPONSIBILITY</u>:

Incumbent performs duties according to a formal schedule with priorities primarily determined by supervisor and service needs of the public. Assignments are guided by broad policies and/or general objectives, with incumbent referring to supervisor when interpretations of departmental policies and procedures are thought necessary. Incumbents' work is reviewed primarily for compliance with departmental policy and legal requirements. Unusual circumstances or developments are discussed with supervisor.

## III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains contact with co-workers, other County departments, court personnel, State Health Department, and the public for purposes of exchanging information, rendering service, and resolving problems.

Incumbent reports directly to the Monroe County Clerk and/or Chief Deputy.

## IV. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in a standard office environment, involving sitting for long periods, sitting/walking at will, lifting/carrying objects weighing up to 50 pounds, bending, reaching, crouching/kneeling, keyboarding, close vision, speaking clearly, hearing sounds/communication, and handling/grasping/fingering objects. Incumbent maintains considerable contact with the public and may be exposed to irate/hostile persons.

Incumbent is occasionally required to work extended hours and travel out of town for training/conferences sometimes overnight and required to respond to emergencies for elections on a 24-hour basis.

## APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Election Supervisor for the Monroe County Clerk's Office describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes\_\_\_\_ No\_\_\_\_

Applicant/Employee signature

Date

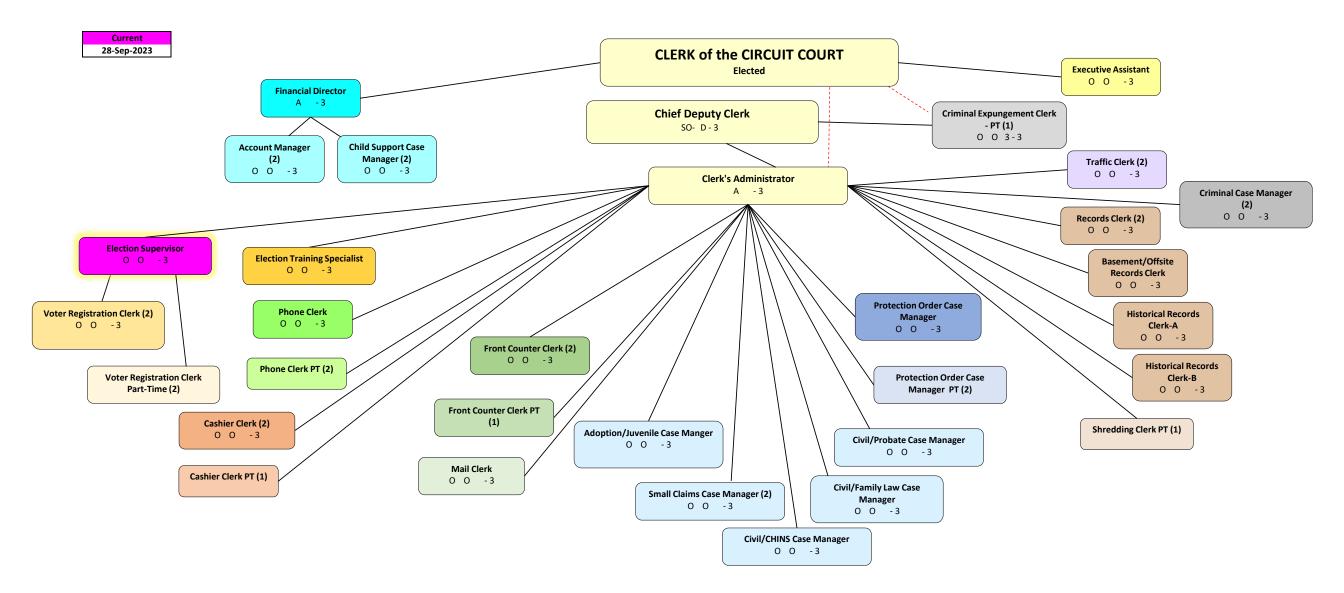
Type or Print name

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

Type or Print name



# Waggoner • Irwin • Scheele

& Associates INC

#### MEMORANDUM

**DATE:** October 24, 2023

#### TO: Monroe County Personnel Administration Committee (PAC) Kim Shell, Council Administrator

FROM: Lori Seelen and Addie Rooker

#### SUBJECT: Classification Requests – Assessor

As requested, Waggoner, Irwin, Scheele, and Associates (WIS) reviewed the following job description updates and reclassification requests for the Monroe County Assessor's Office.

The Assessor's Office submitted nine requests for reclassification to the PAT category and a proposed organizational chart. As you know, our consultants updated the job descriptions in February 2021 from job information provided by each office and department from job questionnaires and/or updated job descriptions that were completed by employees and verified by department heads with signatures and dates of their certification that the job information was accurate and reliable.

## SUMMARY OF JOB CLASSIFICATION REQUESTS

#### 1. Personal Property Assessment Specialist/Deputy

The position is currently classified at COMOT B Non-exempt. The department is requesting reclassification to PAT A. Changes to the job description were grammatical only. There were no changes to assigned duties, education requirements, or responsibilities of the position on the submitted job description.

#### 2. <u>Sales Disclosure Specialist</u>

The position is currently classified at COMOT B Non-exempt. The department is requesting reclassification to PAT A. Changes to the job description indicated an increase in duties. However, no information was provided as to where the duties came from. If the duties were simply copied from the Auditor's office, the classification change is not justified.

#### 3. <u>Real Estate Reassessment Specialist/Deputy</u>

The position is currently classified at COMOT B Non-exempt. The department is requesting reclassification to PAT A. Changes to the job description were grammatical only. There were no changes to assigned duties, education requirements, or responsibilities of the position on the submitted job description.

#### 4. Assistant Property Director/Deputy

The department is requesting to convert the Real Estate Reassessment Specialist position (COMOT B Non exempt) into an Assistant Property Director/Deputy. The department is requesting classification at PAT B. It is unclear how many of the Real Estate Reassessment Specialists will be converted.

#### 5. Market Data Analysis Administrator

The position is currently titled Sales Disclosure Supervisor Deputy and classified at COMOT C Non-exempt. The department is requesting reclassification to PAT C. Changes to the job description showed an increase in duties and responsibilities. If the duties were simply copied from the Auditor's office, the classification change is not justified.

#### 6. Assistant Administrator to PTABOA (level 2)

The position is currently classified at COMOT C Non-exempt. The department is requesting reclassification to PAT C. Changes to the job description indicate an increase in duties. However, no information was provided as to where the duties came from. If the duties were simply copied from the Auditor's office, the classification change is not justified.

#### 7. GIS Assessment Specialist/Deputy

The position is currently classified at COMOT D Non-exempt. The department is requesting reclassification to PAT D. Changes to the job description indicate an increase in education requirements. Again, it is unclear whether the request is based on the needs of the position or in attempt for higher classification.

#### 8. Administrator to PTABOA (level 3)

The position is currently classified at COMOT C Non-exempt. The revisions to the job description define the position similar to that of the Assistant Administrator to PTABOA. The department has not provided information that would define the rank structure/differences between the two positions. Additional information would need to be provided prior to a recommendation being made.

#### 9. <u>Property Director</u>

The position is currently classified at COMOT C Non-exempt. The department is requesting reclassification to PAT D. Changes to the job description shows a decrease in supervisory responsibility; and an increase in educational requirements to a Bachelor's degree. It is unclear whether the request is based on the needs of the position or in attempt for higher classification.

## JOB CLASSIFICATION MAINTENANCE

• The County has adopted a maintenance program and forms for requesting position reclassification. The process utilizes the adopted job descriptions' revisions for clearer understanding of the changes in duties and responsibilities, and a reclassification request form for information that supports the reclassification request. The adopted Maintenance Plan defines the procedures as follows:

#### Procedures for Reclassification of a Position or Reorganization of an Office

The following reclassification/reorganization of office review procedures are established to provide a systematic method to process such requests. Offices or departments submitting a request shall use the following steps to make reclassification/office reorganization requests:

- STEP 1: Secure "Job Classification Review Form" and a copy of the official job description adopted by the County Council for the position(s) being reviewed from the Monroe County Council Administrator.
- STEP 2: Complete and return "Job Classification Review Form," including any supportive documentation to the County Council Administrator. Proposed revisions to the job description should be indicated on the description and be included as part of supportive documentation.
- STEP 3: The "Job Classification Review Form," and supportive documentation will be submitted to the County Job Classification/Compensation Sub-Committee by the County Council Administrator. The Sub-Committee will hear a presentation by the department head or elected official and shall decide whether to submit the request to the Council's professional human resources consultants for their review and recommendation.
- STEP 4: If requested by the Sub-Committee, the Council's professional human resources consultants may conduct an assessment, including but not limited to, the following: reviewing the department's organizational plan, evaluating the factor evaluation points for the position, considering the probable impact on the County's overall classification system and the fiscal impact, and suggesting alternative methods to perform proposed job functions.

- STEP 5: An Assessment Report will be prepared by Council's professional human resources consultants and submitted to the County Council Administrator for distribution to the Sub-Committee.
- STEP 6: The County Job Classification/Compensation Sub-Committee shall review and evaluate the reclassification/office reorganization request, supporting documentation, and Assessment Report; and submit recommendation for approval/disapproval to the County Council.
- STEP 7: The County Council shall review all pertinent information and make a final determination for approval/disapproval.

#### **FINDINGS**

- The Assessor's submitted documentation for the nine reclassifications included a revised job description with redlined changes and a completed job questionnaire for each incumbent, along with a current Department organizational chart and a proposed organizational chart. The current (dated September 2023) organizational chart lists the current job title, weekly work hours, and current classification. The proposed organizational chart indicates the revised job titles, requested classification, and some incumbent names. The Job Classification Review Form was not submitted. Upon request for the completed Job Classification Review Form the Council Administrator stated that the Elected Official had stated they "didn't need to."
- When job reclassification requests are submitted the "official adopted job description" serves as a point of reference. The job classification review form is essential in providing information to answer: What new duties, job requirements or responsibilities are being added to the original base document? What has changed? Do the changes provide clarification to existing duties, or are the revisions completely new to the position? Are there new duties or revisions requiring new skills or knowledge that warrants refactoring? Will a re-factored job move to a different classification level or will the change in points keep the position within the existing point range where the job is currently classified. What impact will a reclassified position have on other jobs in the classification?
- Reclassification requests rely on the validity of the information provided by the current incumbent and the Department Head/Elected Official. Department Heads/Elected Officials are responsible for assigning job duties and education requirements for each position in their office. The purpose of the job description is to accurately describe the duties and requirements of the position. The information provided on the submitted revised job description contradicts the information submitted on the completed job questionnaire. For example, the February 2021 revised job descriptions for the Assessor's office indicates that all positions within the department require a High School Diploma with an associate degree preferred. The completed job questionnaires for the Personal Property Assessment Specialist/Deputy, Sales Disclosure Deputy, and Administrator to PTABOA (level 3) indicate an associate degree is required and the Property Director, Assistant Property Director, GIS Assessment Specialist/Deputy,

Assistant Administrator to PTABOA (level 2), Market Data Analysis Administrator, and Real Estate Reassessment Specialist/Deputy indicate a Baccalaureate degree is required. The positions that require a degree need to identify the duties that support the change education level. It may also be necessary for the County to verify that each incumbent in the Assessor's office holds the revised education requirements.

• It has been reported to WIS consultants that during a public meeting a council member directed the Assessor to copy and paste job duties from the Auditor's job descriptions that have the classification level that the Assessor wants their positions to hold. It is vital that the job descriptions be kept accurate, reliable, and up-to-date for job classification/compensation and other purposes. In order to ensure an accurate documented job description duties must continue to be accurate and specific to the position. Encouraging and/or allowing departments to copy and paste job duties and education requirements from other departments jeopardizes the integrity of the job classification system.

## **RECOMMENDATIONS**

- It is recommended that all reclassification and new position requests follow the adopted maintenance plan. The Monroe County Council Job Classification/Compensation Sub-Committee is responsible for overseeing maintenance of the job classification. This Sub-Committee serves in an advisory capacity to the County Council and is responsible for overseeing job review procedures and making job reclassification and pay policy recommendations to the County Council. All requests shall be presented to the full Council after the Sub-Committee has completed its review and formed its recommendation. The Sub-Committee should serve as a gatekeeper for requests and ensure that the adopted procedures are followed.
- During the 2021 Monroe County Job Classification and Compensation project, it was strongly recommended in the summary report that the County Council adopt, implement, and strictly enforce a job classification plan. Not enforcing the process and procedures will result in the County continuing a pattern of conducting new job class studies to correct classification and compensation discrepancies that were brought on by selective and haphazard County Council job class maintenance.
- WIS Consultants' primary objective is to ensure that the Monroe County compensation system is an accurate and reliable basis for maintaining pay equity among like classified jobs. Our consultants review job classification and new position requests from several perspectives. We research and review the following:

Do added or revised duties impact the existing job requirements respective of education, knowledge, or the level of skills needed to perform the duties? Are the new duties similar to current duties or significantly different? If additional points are assigned to the job will the added points push the job into another classification level or remain in the existing level?

How will a reclassification change impact other positions remaining in the classification? We look at the system County-wide, not just in isolation of single reclassification requests.

We evaluate the job, not the person holding the job. Consultant recommendations are made on an objective basis, and historical knowledge of the Monroe County system.

#### **CONCLUSION**

At this time, WIS cannot make recommendations for the Assessor's nine requests for reclassification due to the conflicting and/or lacking information. It is recommended the PAC require the department submit completed job review forms for each position which explain in detail where the added job duties came from, and identify job duties that require the position to have an associates or bachelor's degree.

Let us know how we can be of further assistance.

#### POSITION DESCRIPTION COUNTY OF MONROE, INDIANA

POSITION: DEPARTMENT: WORK SCHEDULE: JOB CATEGORY: Personal Property Assessment Specialist/Deputy Assessor As Assigned COMOT (Computer, Office Machine Operation, Technician) PAT A (Professional, Administrative, Technological)

# DATE WRITTEN: September 2005STATUS: Full-timeDATE REVISED: May 2015, February 2021, September 2023FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Personal Property Assessment Specialist/Deputy for the Monroe County Assessor's Office, responsible maintaining Business Tangible Personal Property, and Annually Assessed Mobile Home records, verifying accuracy of related documents documentation, and assisting the public.

#### **DUTIES:**

Conducts personal property inventory and moving expense estimates on a limited scope.

Enters personal property information into <del>computer assessment software</del>, including entering activity codes, parcel numbers, federal identification numbers, and <del>values</del> acquired equipment costs as submitted by taxpayer. Scans documents as required.

Reviews business tangible personal property business returns by conducting a desk audit for accuracy, including verifying activity codes, federal identification numbers, parcel numbers, and district numbers, ensuring compliance with state regulations.

Performs assessments for annually assessed mobile homes, including entering mobile home data in CAD based assessment software, on spreadsheets, generating and printing reports, analyzing market data, performing field inspections, and assigning assessments. Generates and mails assessment notices to taxpayers.

Assists software vendor in improving software programs, including recommending alterations and ensuring compliance with state requirements.

Answers telephone, determines nature of call, answers questions, or directs to appropriate individual or agency. Assists citizens at the counter by answering questions, making copies of documents, or directing to appropriate individual or office. Represents the Assessor and GIS office in a customer service role by answering telephones/greeting customers in a welcoming and friendly manner, responding to inquiries, and directing callers/visitors to appropriate individual or department.

Performs duties of other office staff as required.

Performs related duties as assigned.

# I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma or GED. Associates degree and/or related previous experience preferred.

Working Extensive knowledge of Indiana State property tax code, assessing principles as determined by the International Association of Assessing Officials, and techniques and ability to apply such knowledge to a variety of interrelated processes and tasks.

Working knowledge Practical application of English grammar, spelling, and punctuation, and ability to use standard office equipment, including but not limited to computer, keyboard, copier, fax machine, telephone, and calculator.

Working Extensive knowledge of State of Indiana Department of Local Governance Finance rules, regulations, and procedures.

Ability to maintain current knowledge of applicable statutes and guidelines and adapt to changes in procedures accordingly.

Ability to compute/perform arithmetic operations, such as calculating taxes and penalties.

Ability to compile, analyze and evaluate data, make determinations, and present findings in oral or written form.

Ability to compare or observe similarities and differences between data, people, or things.

Ability to maintain knowledge of all computer software programs used by Assessor's Office.

Ability to apply knowledge of people and locations, and read/interpret detailed equipment lists, invoices, sketches, specifications, and maps.

Ability to perform the statutory duties as prescribed for the County Assessor's Office as authorized by the Assessor and State of Indiana.

Ability to effectively communicate orally and in writing with co-workers, other Monroe County departments, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to work alone with minimum supervision and with others in a team environment, , often amidst frequent distractions and interruptions, and under pressure from formal schedules, deadlines, and high volume operations.

Ability to work on several tasks at the same time and work rapidly for long periods, often under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

# II. <u>RESPONSIBILITY</u>:

Incumbent performs a variety of duties according to a flexible, customary routine with priorities determined by seasonal deadlines and service needs of the public. Incumbent has full discretion and authority allowed under the County Assessor's policies, procedures, and practices in making assessment valuation decisions. Errors in incumbent's work are detected through supervisory review and/or legally defined procedures. Undetected error may result in loss of money and/or loss of time for correction.

## III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent contact with co-workers, other County departments, and the public for a variety of purposes including explaining and interpreting departmental policy and assuring proper accomplishment of duties.

Incumbent reports directly to Deputy-Personal Property Specialist Supervisor. Chief Deputy, and/or County Assessor

# IV. PHYSICAL EFFORT AND WORKING ENVIRONMENT:

Incumbent performs duties in a standard office environment, including sitting/walking at will, sitting for long periods, lifting/carrying objects weighing up to 25 pounds, close/far vision, speaking clearly, hearing sounds/communication, and driving. Incumbent may be exposed to potentially irate/hostile individuals.

## **APPLICANT/EMPLOYEE ACKNOWLEDGEMENT**

The job description for the position of Personal Property Assessment Specialist/Deputy for the Monroe County Assessor Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes\_\_\_\_ No\_\_\_\_

Applicant/Employee signature

Date

Type or Print name

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

Type or Print name

Date 9/15/2023

# **Employee Job Questionnaire**

# **COUNTY OF MONROE, INDIANA**

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

Position Title:	Personal Property	Assessment Specialist/ Deputy
Department:	ssessors Office	na (na sena a bian si a prantana da da a la ana a bian ana ana ana ana ana ana ana ana ana
Employee Nar	<sup>ne:</sup> Jaclyn Combs	
FLSA State	us: 🛈 Exempt	• Non-exempt

#### • Purpose •

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- a department reorganization study
- a measure of how well you perform your duties

#### • Instructions •

- 1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
- 2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
- 3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.

4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

#### DO NOT DETACH THIS INSTRUCTION SHEET

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# Helpful Hints for Completing the Job Questionnaire

Please be aware that this project does <u>NOT</u> involve performance evaluations of individuals. We aren't collecting information about <u>how</u> you perform, only <u>what</u> you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner*, *Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a "snap shot" of the basic functions of a position – it is <u>not</u> a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands <u>the essential functions and the skills necessary to perform the job</u>.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

• You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, "Maintains statistics on computer for Indiana Department of Environmental Management (IDEM)."

• Also, explain any terminology that may be unique to your department, such as report names and form numbers. For example, "Complete XQ325 forms" may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, "Complete payment assistance application forms."

• Are machines, equipment, or special tools involved in accomplishing tasks? For example, "*Post payments*" could involve a computer or writing in manual ledgers, and "*Update maps*" could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

# Section I Essential Functions of Position

#### 1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

Maintaining Business Tangible Personal Property and Annually Assessed Mobile Home records and verifying accuracy of related documentation.

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

# If Duties Section of your existing job description is accurate please note "see existing description' and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

	Essentiality	Frequency
Supervise subordinate personnel	<u></u>	<u></u>
<b>ESSENTIALITY</b>	<b>FREQUENCY</b>	
A= Marginal function of the job B= Essential function of the job	C= Perform annua D= Perform quart E= Perform month F= Perform weekl G= Perform on rea	erly at a minimum hly at a minimum y at a minimum

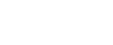
#### **List Primary Duties:**

- Records Business Tangible Personal Property Return information into assessor software along with analyzing returns by conducting desk audits for accuracy.
- Works closely with American Financial Credit Services (AFCS), Treasurer and Legal departments to process and track Judgements to assure accuracy which is crucial to collecting back taxes.

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- Performs assessments for Annually Assessed Mobile Homes, including entering data in CAD based assessment software using values from the Indiana State approved National Automobile Dealers Association (NADA).
- Processing manufactured (mobile) home permits from the Treasurers Office.
- Assists software vendor in improving software programs, including recommending alterations and ensuring compliance with state requirements.
- Represents the Assessor and GIS office in a customer service role by answering telephones/greeting customers in a welcoming and friendly manner, responding to inquiries, and directing callers/ visitors and appropriate individual or department.
- Performs field reviews of Annually Assessed Mobile Homes. Including measuring homes, porches, and other structures for accuracy.
- Aides in prepares monthly and annually checks and balances prior to submitting reports to State of Indianas Department of Local Government and Finance (DLGF), Legislative Service Agency (LSA), and the Auditors office.
- Analyze and processes annual mobile home placement sheets in pursuant to the provisions of IC 6-1.1-7-3.



B

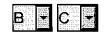








KC.



- 10. Prepares, prints, and mails annual Form 2, Notice of assessment of manufcatured (mobile) home.
- 11. Prepares, prints, and mails Bussiness Tangible Personal Property Forms.
- 12. Prepares and mails correction Form 113/PP and Form 130's for taxpayer as well as Auditor's Office.
- While adhering to state laws, preform informal hearings with taxpayers which includes verifying accuracy of data for Annually Assessed Mobile Homes.
- Researches and processes new and closed businesses per the Indiana Department of Revenue County Assesor's New/Closed Account Reports.

# Section II

#### Job Requirements/Training/Certification

1. Check level of formal education that is <u>required</u> for your position. When specifying college degrees, please identify acceptable fields of study.

High school diploma/GED	Associate Degree	Baccalaureate Degree	Masters Degree	
_				
Other (Please describe):		and a first of the second s An an		

Acceptable fields of study: Accounting, Business, Finance

# 2. Specialized training, certification, and/or specific experience <u>required</u> for your position (such as Certified Public Accountant).

State of Indiana Level II Certified Indiana Assessor/Appraiser. Yearly continuing education for Level Certification maintenance.

# B







B 🛛 🖸
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3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

Working knowledge of State of Indiana property tax code and assessing principals, English grammar, departmental functions, office procedures, and software used in the office.

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

Level I and Level II textbook and reference material. National Automobile Dealers Association (NADA) Manufactured Home Reference Guide, Federal Workforce of Indiana.

- 5. Does your position require that you have a valid driver's license? Yes No If yes, for which duties? Field reviews, continuing education, and Personal Property audits.
- 6. Does your position require you to be at least 21 years of age? Yes No

#### 7. Does your position require passage of a:

- Medical exam? OYes ONo
- Drug test? Yes No
- Psychological exam? OYes ONo
- Written exam? Yes No

Other tests: Level I and Level II Certifications within 2 years of hire date.

#### 8. Check and list equipment you operate as a regular part of performing your duties:

Computer	Typewriter	Calculator	Transcriber/dictaphone	Vehicle
Other (Plea	se describe) Prir	nter, copier, and f	ax machine.	

# 9. Your fundamental job duties may involve some relationship between you and <u>data</u> (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that <u>most accurately</u> describe your involvement with data.

Compare or observe similarities and differences between data, people, or things.

- Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing operating budget, determining charges.
- Compile, collate, or classify data.
- Analyze, evaluate, observe, diagnose, investigate.

Coordinate, place, make determinations, take action based on data analysis.

Fabricate data to discover facts or develop concepts or interpretations.

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10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that <u>most accurately</u> apply to your job responsibilities.

- Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).
- File, post, mail materials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).
- Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).
- Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

# Section III

#### **Difficulty of Work/Responsibility**

- 1. Which of the following phrases best describes the type of supervision you receive?
- Immediate supervision. Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- Assignments and objectives set jointly by immediate supervisor and myself. Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- Indirect or occasional supervision. Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- General supervision. Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- Administrative or advisory direction from a board or CEO. Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

#### 2. Which of the following phrases <u>best</u> describes the criteria for which your work is reviewed? Work is reviewed <u>primarily</u> for...

Attainment of objectives	Appropriate supervision or direction of			
Compliance with precedent	Adherence to instructions/guidelines			
Technical accuracy	Compliance with Department policy	Effect on Department goals/objectives		
Soundness of judgment	Other (please describe):			
If you checked more than two, please provide explanation:				

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# 3. Check one of the following statements that <u>most accurately</u> describes the judgment you use in performing fundamental job duties.

Decisions are always determined by specific instructions or existing, well established policies and procedures.

- On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

# 4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please explain and provide examples.*

Analyzing and interpreting field data to effectivly assess Annually Assessed Mobile Homes. As an example, using collected field data and sales to identify the best method to affect market value.

#### 5. What programs, persons and/or functions are directly affected by the decisions you make?

Monroe County property owners, The Auditor's office, The Treasurer's Office, and The Assessor's Office.

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

Using analyzed sales and field data to produce property value. Those that can overrule me are the Personal Property Specialist Supervisor/Deputy, Chief Deupty and Monroe County Assessor.

#### Section IV

#### Personal Work Relationship/Supervisory

1. What is the name and position title of your immediate supervisor?

Supervisor: Tonya Purtlebaugh Title: Personal Property Specialist Supervisor/Deputy

2. Complete A) and B) only if you supervise or direct the work of others:

#### A) List names and position titles of employees you supervise or direct as a regular part of your duties.

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B) (	Check which statements most accurately describe your managerial/supervisory responsibilities.
	Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.
	Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.
	Interview candidates for openings and make hiring recommendations.
	Make hiring decisions.
	Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.
	Plan, delegate and control work assignments and special projects to assigned staff.
	Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.
	Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.
	Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.
	Evaluate the performance results of assigned staff. Discuss present and past performance with each person. Keep supervisor informed of performance discussion results.
	Review salaries of assigned staff and recommend changes when warranted.
	Recommend personnel actions, such as promotions, transfers, demotions.
	Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.
	Maintain discipline and recommend corrective action as warranted.
	Communicate and administer personnel programs and procedures for my area in accordance with approved policies.
3. I	list other departments, agencies, organizations, and others with whom you regularly communicate.
	Treasurers Office, Auditor's Office, Xsoft Specialist, Third party debt collectors, Tax Representatives, CPA's, Title Companies/Mortgage lenders, Attorney's and Department of Local Government Finance (DLGF).
	Check which statements <u>most accurately</u> describe your contact with employees, customers, governmental icials, or the general public.
V	<b>Cooperative Work Relationship:</b> Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.
Z	<b>Render Service:</b> Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.
2	<b>Instruct:</b> Teach or present subject matter to others through explanation, demonstration and supervised practice.
~	<b>Negotiate:</b> Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.

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Mentor: Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

#### Section V

Physical Effort/Work Environment						
1. Which of the following best describes your primary working environment?						
Laboratory	Standard office	🔄 Storeroom 📑 Vehicle 🔄 Outdoors				
Garage/shop	Manufacturing setting	Other (please describe):				
If you checked more than one, please provide additional explanation.						

2. Which of the following best describes your <u>primary</u> working conditions? <u>ESSENTIALITY</u>

> N/A= Not Applicable to job A= Marginal requirement of job B= Essential requirement of job

#### **Essentiality**

В

В

В

В

В

В

B

В

А

В

в

- work alone with minimum supervision
  - work under time pressure
    - work on several tasks at the same time
- read/carry out simple written instructions
  - ✓ apply knowledge of people, locations
  - plan and layout assigned work projects
  - compute/calculate, such as interest
  - count, make simple arithmetic additions/subtractions
  - read/interpret detailed prints, sketches, layouts, specifications, maps
- prepare detailed reports, such as financial statements, sales activity, product feasibility
- plan and present public speaking presentations, fund raisers, special events
  - sitting & walking at will
  - standing/walking for long periods

В

sitting for long periods

walking on uneven terrain

#### **Essentiality**

B	work with others in a team environment
B	work rapidly for long periods
B	understand and carry out oral instructions
B	memorize and retain instructions
B	present findings in oral or written form
N/A 🖻	testify in legal proceedings/court

N/A work in extreme hot or cold temperat	tures	N/A 🚽 🛛	vork in wet/icy surroun	dings
N/A respond to emergencies from off-dut	y status	N/A - W	ork with or near chem	icals (please list)
N/A work near fumes, odors, dust, dirt (pl	ease describe)		re often irate tax payo ing explanations abo	
N/A work in a noisy environment (describ	e noise source)		nents, late fees and/o	
N/A work in confined areas (please descri	be)	acquire		
N/A wear protective clothing or equipment	ıt (please describe	)		
N/A work in high places, such as ladders,	roofs, bucket truc	k (please d	escribe)	
A work with or exposed to violent/irate	individuals (plea	se describe)	)	
N/A respond to situations involving poten	tial physical harm	n to self and	others (please describe	e)
B Iifting under 25 pounds B Ii	fting 25 to 50 pou	inds N	A lifting over 50 p	oounds
B yushing/pulling objects B 😽 c	arrying objects		crouching/knee	ling
B bending at waist B F re	eaching	A	driving	
B close vision B fa	ur vision		color perception	1
B depth perception B S	peaking clearly		hearing sounds/	communication
B handling/grasping objects B F fi	ngering objects (p	picking, pin	ching)	
3. List the three most physically demand	ing activities you	regularly	perform in your job.	
Lifting documentation in bulk.				
Sitting and standing for long periods of time.	a for a star (C. Sector et al forma de la model program de protectes) en antenen (C. Sector et al forma de la model program de la model de la model de la model de la model de la mod			
of time infront of a computer screen.				
	a da de la de la contra de la			
4. List the three most emotionally deman	ding activities y	ou <u>regular</u> l	l <u>y</u> perform in your jol	).
Dealing with hostile taxpayers on the phone	and in person.		per de la constanta de la cons En la constanta de la constanta	
Stressful deadlines.				
Technical Failures.				
5. What is your normal work schedule (e	example, 8 a.m. 4	<b>p.m. M-F</b>	)?	
8 a.m 4 p.m. M-F				
	Never	Pomles	ly Occasionally	
6. Are you required to:			_	
a. work extended hours	۲	0	۲	
1	۲	0	0	

b. work weekends

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	Never	Regularly	<b>Occasionally</b>
c. work evenings	۲	0	0
d. travel out of town, but not overnight For what purpose?	0	0	۲
Continuing Education			
c. travel out of town overnight For what purpose?	0	0	۲
Continuing Education/ Conference			
f. respond to emergencies on 24-hr basis	0	0	0
g. on call on rotation basis	0	0	0

7. Provide any other examples/information which would be helpful in understanding the physical and mental requirements of your job.

Producing critical information within short periods of time.

8. Is your position politically appointed by a recognized Department Head or Elected Official according to= IC 36-2-16-4? Yes O No O

# Section V

# **Certifications**

Employee: I certify that the above statements are an accurate and fair description of my position.

Name (print or type) Jaclyn Combs	Hire date 01/06/2020
Title Personal Property Assessment Specialist	Department Assessor
Signature	Date 09/15/2023

*Supervisor:* I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes 🔘 No 🥝

Signature		Julit De	
	//		F

Date 9-15-23

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc. 118 South Franklin Street Muncie, IN 47305 Phone: (765) 286-5195 Fax: (765) 286-2824

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#### POSITION DESCRIPTION COUNTY OF MONROE, INDIANA

POSITION:	Sales Disclosure Speci	alist/Deputy
<b>DEPARTMENT:</b>	Assessor	1 1
WORK SCHEDULE:	As Assigned	
JOB CATEGORY:	COMOT (Computer, Office Machine Operation, Techn	
	· -	Administrative, Technological)
<b>DATE WRITTEN: Janu</b>	No. 100 (1997) 100 (1907) 100 (1997) 100	STATUS: Full-time
<b>DATE REVISED: Febru</b>	ary 2021	FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Sales Disclosure Specialist/Deputy for the Monroe County Assessor's Office, responsible for managing sales disclosures filed in the County and providing data used for real estate assessed values.

#### **DUTIES:**

Approves sales disclosures submitted through e-filing and hard copies received from title companies, attorneys, and citizens, including verifying inclusion of appropriate information and returning of incomplete forms for resubmission once corrected.

Collects sales disclosures from Auditor after they are filed and inserts missing information, including assessed valuations, neighborhood and property codes, and taxing districts. Determines new construction status as required. Verifies sales prices and determines validity, including contacting title companies, sellers, and/or buyers. Enters sales disclosure information in Computer Assisted Mass Appraisal Software provider. Investigates MLS, GIS and Realtor market resources to determine the validity of sales for compliance to state mandated sales ratio standards.

Scans sales disclosures for use on geographic information systems (GIS) website and for data entry, ensuring telephone numbers are omitted as required. Verifies proper scanning of documents, including typing handwritten information to ensure readability by scanner. Scans sales disclosures released before implementation of scanning process to make records current. Distributes quality controlled sales data for use on the GIS website. Communicates appropriate sales information to local newspapers for publication.

Answers telephone, determines nature of call, answers questions, or directs to appropriate individual or agency. Assists citizens at the counter by answering questions, making copies of documents, or directing to appropriate individual or office. Assists individuals with locating real estate, property identification numbers (PIN), addresses and property owners. Verifies taxation amounts for various periods and parcels on owner request. Prepares necessary forms and records related to the transfer of property deeds within the county. Enters appropriate information into computer files, creates fees for processing and completion of transfer activities, working closely with the auditor and recorder offices as appropriate.

Supports the updating and maintenance of all County plat books, GIS system attributes, geo-mapping of County plat information from survey documents, various property transactions, and develops and implements procedural guidelines.

Investigates homestead deductions and fee requirements on transfers, reviewing deeds to confirm compliance with state law.

Conducts research of legal documents to ensure correct platting of property descriptions and property in use. Including deeds, surveys, resolutions, court orders, declarations, plats, mortgages, leases and contracts.

Working knowledge of GIS computer procedures and ability to apply such knowledge to a variety of interrelated processes, tasks and operations.

Distributes information and responds to inquiries from the public, title preparatory offices, attorneys, and other county offices in how to properly use sales disclosures to transfer property interests. Answers questions to train individuals for state compliance.

Assists taxpayers with understanding assessments, including reviewing property record cards, explaining information and resolving complaints.

Participates in continued education required by State Law to maintain job certifications throughout the year.

Performs duties of other office staff as required.

Performs related duties as assigned.

## I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma or GED. Associates degree and/or related previous experience preferred.

Possession of and ability to maintain possession of level 2 assessor/appraiser certification.

Working knowledge of state of Indiana property tax code, sales disclosure regulations, and assessing principles according to the International Association of Assessing Officials (IAAO) and techniques and ability to apply such knowledge to a variety of interrelated processes and tasks.

Knowledge of English grammar, spelling, and punctuation and the ability to use standard office equipment, including but not limited to computer, keyboard, copier, fax machine, telephone, scanner, and calculator.

Knowledge of departmental functions and office procedures and ability to properly maintain official department records and documents.

Comprehensive knowledge of software used in the assessor, auditor, building, planning, treasurer and recorder's offices.

Ability to perform the statutory duties as prescribed for the County Assessor's Office as authorized by the Assessor.

Ability to effectively communicate orally and in writing with co-workers, other County departments, title companies, attorneys, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, often under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally work extended hours and travel out of town for training/conferences, sometimes overnight.

## II. <u>RESPONSIBILITY:</u>

Incumbent performs a variety of duties according to a formal schedule with priorities determined by seasonal deadlines and service needs of the public. Errors in incumbent's work are prevented through procedural safeguards and are detected through supervisory review and/or notification from other departments/agencies. Undetected errors may result in loss of money and/or loss of time for correction.

#### III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent contact with co-workers, other County departments, title companies, attorneys, and the public for a variety of purposes, including explaining and interpreting departmental policy and assuring proper accomplishment of duties.

Incumbent reports directly to Deputy/Sales Disclosure Supervisor and/or Chief Deputy.

## IV. PHYSICAL EFFORT AND WORKING ENVIRONMENT:

Incumbent performs duties in a standard office environment and in the field, involving sitting and walking at will, sitting for long periods, lifting/carrying objects weighing up to 50 pounds, close/far

vision, speaking clearly, and hearing sounds/communication. Incumbent may be exposed to potentially irate/hostile individuals.

Incumbent occasionally works extended hours and travels out of town for the purpose of training/conferences, sometimes overnight.

## APPLICANT/EMPLOYEE ACKNOWLEDGEMENT

The job description for the position of Sales Disclosure Specialist/Deputy for the Monroe County Assessor Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes\_\_\_\_ No\_\_\_\_

Applicant/Employee signature

Date

Type or Print name

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

Type or Print name

Date 9/11/23

### **Employee Job Questionnaire**

### COUNTY OF MONROE, INDIANA

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

Position Title:	Sales Disclosure Specialist/Deputy		
Department:	Assessor		
Employee Na	me: Madison Miller	]	

FLSA Status:	OExempt	Non-exempt
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### Purpose •

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- a department reorganization study
- a measure of how well you perform your duties

### • Instructions •

- 1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
- 2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
- 3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.

4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

### DO NOT DETACH THIS INSTRUCTION SHEET

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### Helpful Hints for Completing the Job Questionnaire

Please be aware that this project does <u>NOT</u> involve performance evaluations of individuals. We aren't collecting information about <u>how</u> you perform, only <u>what</u> you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner*, *Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a "snap shot" of the basic functions of a position – it is <u>not</u> a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands <u>the essential functions and the skills necessary to perform the job</u>.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

• You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, "Maintains statistics on computer for Indiana Department of Environmental Management (IDEM)."

 $\circ$  Also, explain any terminology that may be unique to your department, such as report names and form numbers. For example, "Complete XQ325 forms" may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, "Complete payment assistance application forms."

• Are machines, equipment, or special tools involved in accomplishing tasks? For example, "*Post payments*" could involve a computer or writing in manual ledgers, and "*Update maps*" could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

### Section I Essential Functions of Position

#### 1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

Responsible for managing Sales Disclosures filed in the County and providing data used for real estate assessed values.

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

### If Duties Section of your existing job description is accurate please note "see existing description' and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

	Essentiality	Frequency	
Supervise subordinate personnel	<u>_B</u>	<u> </u>	
<b>ESSENTIALITY</b>	<b>FREQUENCY</b>		
A= Marginal function of the job B= Essential function of the job	C= Perform annua D= Perform quarte E= Perform month F= Perform weekly G= Perform on reg	erly at a minimum ly at a minimum v at a minimum	
List Primary Duties:			Essen Freq
1. Approves sales disclosures, includir	ng verifying inclusion	n of	

 Approves sales disclosures, including verifying inclusion of appropriate information and returning of incomplete forms for resubmission once corrected.

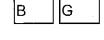
2.	Collects sales disclosures from Auditor after they are filed. Determines
	new construction status as required. verifies sales prices and
	determines validity. Contacting title companies, sellers and buyers.

В	F

lG

B

- <sup>3.</sup> Distributes quality controlled sales data for use on the GIS website. Communicates appropriate sales information to local newspaper for publication.
- 4. Assists individuals with locating real estate, property identification numbers, addresses and property owners. Enters appropriate information into computer files, creates fees for processing and completion of transfer activities.
- <sup>5.</sup> Supports the updating and maintenance of all County plat books, GIS system attributes, geo-mapping of County plat information from survey documents.
- 6. Investigates homestead deductions and fee requirements on transfers, reviewing deeds to confirm compliance with state law.
- Conducts research of legal documents to ensure correct platting of property descriptions and property in use.
- 8. Working knowledge of GIS computer procedures.
- <sup>9.</sup> Distributes information and responds to inquiries from the public, title preparatory offices, attorneys, and other county offices.





G

A









- <sup>10.</sup> Assists taxpayers with understanding assessments, including property record cards, explaining information and resolving complaints.
- 11. Participates in continued education required by State Law to maintain job certifications.
- 12. Works with real estate department to investigate missing data in neighborhoods with assessment inconsistencies through the use of recorder software, plat books and Online research.
- 13. Performs related duties.
- <sup>14.</sup> Perform duties of other office staff.

### Section II

### Job Requirements/Training/Certification

1. Check level of formal education that is <u>required</u> for your position. When specifying college degrees, please identify acceptable fields of study.

	] High school diploma/GED 🔽 Associate Degree 🗌 Baccalaureate Degree 🗌 Masters Degree
	Other (Please describe):
ł	Acceptable fields of study:
	2. Specialized training, certification, and/or specific experience <u>required</u> for your position (such as Certified Public Accountant).
1	State of Indiana level 2 certified Indiana Assessor/Appraiser. Yearly continuing education for level certification maintenance.

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### вС





A	F



### 3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

Working knowledge of state of Indiana property tax code, sales disclosure regulations, and assessing principles, English grammar, departmental functions and office procedures, and software used in the offices.

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

Level 1 and Level 2 text book and reference material and real estate and commercial property listing publications.

5. Does your position require that you have a valid driver's license? • Yes O No If yes, for which duties?

Field inspections and continued education.

6. Does your position require you to be at least 21 years of age? O Yes ONO

#### 7. Does your position require passage of a:

Medical exam?	OYes	⊙ No
Drug test?	⊙Yes	O No
Psychological exam?	OYes	⊙ No
Written exam?	OYes	• No

Other tests: Level 2 Assessor/Appraisal certification within 2 years of hire date.

#### 8. Check and list equipment you operate as a regular part of performing your duties:

Computer	Typewriter	Calculator	Transcriber/dictaphone	✓ Vehicle
Other (Pleas	se describe)			

## 9. Your fundamental job duties may involve some relationship betweeu you and <u>data</u> (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that <u>most accurately</u> describe your involvement with data.

Compare or observe similarities and differences between data, people, or things.

- Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing operating budget, determining charges.
- Compile, collate, or classify data.
- Analyze, evaluate, observe, diagnose, investigate.
- Coordinate, place, make determinations, take action based on data analysis.
- Fabricate data to discover facts or develop concepts or interpretations.

10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that <u>most accurately</u> apply to your job responsibilities.

- Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).
- File, post, mail materials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).
- Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).
- Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

### Section III Difficulty of Work/Responsibility

- 1. Which of the following phrases <u>best</u> describes the type of supervision yon receive?
- O Immediate supervision. Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- Assignments and objectives set jointly by immediate supervisor and myself. Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- Indirect or occasional supervision. Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- O General supervision. Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- Administrative or advisory direction from a board or CEO. Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

### 2. Which of the following phrases <u>best</u> describes the criteria for which your work is reviewed? Work is reviewed primarily for...

Attainment of objectives	Appropriate supervision or direction of assigned operations
Technical accuracy	Compliance with Department policy Effect on Department goals/objectives
Soundness of judgment	Other (please describe):
If you checked more than two,	blease provide explanation:

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### 3. Check one of the following statements that <u>most accurately</u> describes the judgment you use in performing fundamental job duties.

- O Decisions are always determined by specific instructions or existing, well established policies and procedures.
- On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- O Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- O Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- O Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please explain and provide examples.* 

Analyses sales disclosures to determine validity for ratio studies. As an example, using market data to determine if transfers are arms length, valid sales.

5. What programs, persons and/or functions are directly affected by the decisions you make?

Nexus Group, GIS, Monroe County Property Owners, Recorder, Auditor and Assessors Offices and DLGF

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

The highest level decision this job makes is the validation of sales. Those decisions may be overruled by the Market data analysis administrator.

### Section IV

### Personal Work Relationship/Supervisory

1. What is the name and position title of your immediate supervisor?

Supervisor: Danial Warner

Title: Market Data Analysis Administrator

2. Complete A) and B) only if you supervise or direct the work of others:

#### A) List names and position titles of employees you supervise or direct as a regular part of your duties.

<b>B</b> ) (	Check which statements most accurately describe your managerial/supervisory responsibilities.
	Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.
	Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.
	Interview candidates for openings and make hiring recommendations.
	Make hiring decisions.
	Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.
	Plan, delegate and control work assignments and special projects to assigned staff.
	Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.
	Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.
	Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.
	Evaluate the performance results of assigned staff. Discuss present and past performance with each person. Keep supervisor informed of performance discussion results.
	Review salaries of assigned staff and recommend changes when warranted.
	Recommend personnel actions, such as promotions, transfers, demotions.
	Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.
	Maintain discipline and recommend corrective action as warranted.
	Communicate and administer personnel programs and procedures for my area in accordance with approved policies.
3. I	ist other departments, agencies, organizations, and others with whom you regularly communicate.
	Auditor and Recorder.
	Check which statements <u>most accurately</u> describe your contact with employees, customers, governmental icials, or the general public.
<b>√</b>	<b>Cooperative Work Relationship:</b> Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.
√	<b>Render Service:</b> Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.
√	<b>Instruct:</b> Teach or present subject matter to others through explanation, demonstration and supervised practice.

Negotiate: Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.

Mentor: Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

### Section V

Physical Effort/Work Environment				
lowing best describes your <i>j</i>	primary working environmen	.t?		
Standard office	Storeroom Vehicle	Outdoors		
Manufacturing setting	Other (please describe):			
: than one, please provide addi	itional explanation.			
	lowing best describes your I ✓ Standard office ☐ Manufacturing setting	lowing best describes your primary working environmen         Image: Standard office         Image: Standard office		

2. Which of the following best describes your <u>primary</u> working conditions? ESSENTIALITY

> N/A= Not Applicable to job A= Marginal requirement of job B= Essential requirement of job

### **Essentiality**

В

А

А

В

lв

В	work alone with minimum supervision	В	work with others in a team environment
В	work under time pressure	В	work rapidly for long periods
В	work on several tasks at the same time	В	understand and carry out oral instructions
В	read/carry out simple written instructions	В	memorize and retain instructions
В	apply knowledge of people, locations	В	present findings in oral or written form
A	plan and layout assigned work projects	N/A	testify in legal proceedings/court
В	compute/calculate, such as interest		

**Essentiality** 

count, make simple arithmetic additions/subtractions

read/interpret detailed prints, sketches, layouts, specifications, maps

N/A prepare detailed reports, such as financial statements, sales activity, product feasibility

plan and present public speaking presentations, fund raisers, special events

 sitting & walking at will
 B
 sitting for long periods

 standing/walking for long periods
 A
 walking on uneven terrain

N/A	work in extreme hot or co	ld temperat	tures	N/A	work i	n wet/icy surroundings	
N/A	respond to emergencies fr	om off-dut	y status	N/A	work v	vith or near chemicals (p	olease list)
N/A	work near fumes, odors, d	ust, dirt (pl	ease describe)			en irate individuals	
N/A	work in a noisy environme	ent (describ	e noise source)	asses	sments	xplanations about s, especially during tax	
N/A	work in confined areas (pl	ease descri	be)	seaso	n.		
N/A	wear protective clothing o	r equipmer	nt (please describe	e)			
N/A	work in high places, such	as ladders,	roofs, bucket true	ck (please	describ	pe)	
A	work with or exposed to v	iolent/irate	individuals (plea	se descrit	be)		
N/A	respond to situations invol	ving poten	tial physical ha <del>rn</del>	n to self a	nd other	rs (please describe)	
В	lifting under 25 pounds	B li	fting 25 to 50 por	ınds	N/A	lifting over 50 pounds	
В	pushing/pulling objects	B ca	arrying objects		В	crouching/kneeling	
В	bending at waist	B re	eaching		A	driving	
В	close vision	A fa	ır vision		В	color perception	
В	depth perception	B st	beaking clearly		В	hearing sounds/comm	unication
В	handling/grasping objects	B fi	ngering objects (p	picking, p	inching	)	
	at the three most physical nding and sitting for long periods		ing activities you	ı <u>regular</u>	ly perfo	orm in yonr job.	
ĺ							
		· · ·					
4. Lis	st the three most emotion:	ally deman	ding activities y	ou <u>regula</u>	<u>ırly</u> per	form in your job.	
Dea	aling with hostile tax payers in pe	erson and on	the phone				
5 11/1		ah adarla (a		n - M	<b>F</b> \9		
r	hat is your normal work s n.m. 4p.m. M-F	chequie (e	example, o a.m. 4	<b>p.m. M</b> -	· <b>r</b> ):		
<b>L</b>	•		Never	Dami	antr O		
	e you required to: ork extended hours		<u>Ivever</u>	<u>Regui</u>	<u>ariy</u> <u>U</u>	<u>eccasionally</u>	
	ork weekends		0	0		•	

	Never	<b>Regularly</b>	<b>Occasionally</b>
c. work evenings	0	0	۲
d. travel out of town, but not overnight For what purpose?	0	0	۲
Continuing education			
c. travel out of town overnight For what purpose?	0	0	۲
Continuing education			
f. respond to emergencies on 24-hr basis	۲	0	0
g. on call on rotation basis	۲	0	0

7. Provide any other examples/information which would be helpful in understanding the physical and mental requirements of your job.

8. Is your position politically appointed by a recognized Department Head or Elected Official according to= IC 36-2-16-4? Yes O No O

### Section VI

### Certifications

Employee: I certify that the above statements are an accurate and fair description of my position.

Name (print or type) Madison Miller	Hire date 7/5/22
Title Sales Disclosure Specialist/Deputy	Department Assessor
Signature	Date

*Supervisor:* I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes  $\bigcirc$  No  $\bigcirc$ 

Signature	Chalad all	Date	9-15-23	
-				

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc. 118 South Franklin Street Muncie, IN 47305 Phone: (765) 286-5195 Fax: (765) 286-2824

### POSITION DESCRIPTION COUNTY OF MONROE, INDIANA

# POSITION:Real Estate Reassessment Specialist /DeputyDEPARTMENT:AssessorWORK SCHEDULE:As assignedJOB CATEGORY:COMOT (Computer, Office Machine Operation, Technician)PAT A (Professional, Administrative, Technological)

### DATE WRITTEN: September 2005 STATUS: Full-time DATE REVISED: May 2015, February 2021, September 2023 FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Real Estate Reassessment Specialist/Deputy for the Monroe County Assessor's Office, responsible for the reassessment of non- movable property valuation on residential, commercial, industrial, and new construction and assisting the public.

### **DUTIES:**

Reviews, analyzes, and interprets residential property data, using data to develop assessments for new construction. Sketches dwellings and enters property information into computer, making necessary corrections to property record cards as needed. Researches, analyzes, and interprets residential property data, using field data, building permits and blueprints to develop assessments for new construction. Uses CAD based assessment software to sketch building outlines and create property information and make necessary updates to property record cards.

Verifies market data/sales with buyers, sellers, brokers, bankers, appraisers, county assessors, and others knowledgeable in real estate practices and activities. Investigates market and sales data with buyers, sellers, real estate brokers, bankers, appraisers, other County Assessors and additional professionals knowledgeable in real estate practices and activities.

Reviews county wide ongoing reassessments for new construction and existing commercial industrial, agricultural and residential property, including assisting in measuring and collecting data, inputting permits in Nexus system in CAD based assessment software, verifying work, and ensuring the value on a parcel matches data and is accurate with the style of structure. Assisting with quality control and ensuring the value on a parcel is accurate. Serves in constant collaboration with Nexus Group.

Processes building and occupancy permits submitted to department, including receiving monthly from Building Department, sorting by township, making copies, and distributing as appropriate. Entersbuilding and occupancy permits into spreadsheet and provides reassessment data on real propertyabatements. Processes building and occupancy permits from Monroe County and Ellettsville Building Department. Tracks new construction building and occupancy permits for taxation purposes and closely monitors inspector data for property completion. Assists software vendors in developing customized software for use in department operations and educates and trains staff members on GIS software. Collaborates with software vendors in developing customized software for use in department operations and educates and trains staff members on assessment and GIS software and procedures.

Prepares, prints, and mails notices to taxpayers as alterations are made to property records, including new construction, corrections, or adjustments.

Assists taxpayers with understanding assessments, including reviewing property card, explaining information, and resolving complaints. Educates and aides taxpayers in understanding property assessments, including reviewing property card, answering questions, explaining information, resolving complaints and diffusing irate individuals to aide in their understanding. Communicates with taxpayers using various methods such as mail, email, chat, text, zoom, telephone, and in person.

Communicates with Auditor all valuation changes that need to be made to Taxing Increment Finance (TIF) according to State timeline.

Prepares reports annually and performs check and balances prior to submitting reports to State as required.

Attends various meetings and attends training sessions as required or needed. Attends various meetings and continued education courses to maintain State required professional certifications.

Answers telephone, determines nature of call, answers questions or directs to appropriate individual or agency. Assists citizens at the county by answering questions, making copies of documents, or directing to appropriate individual or office. Represents the Assessor and GIS office in a customer service role by answering telephones/greeting customers in a welcoming and friendly manner, responding to inquiries, and directing callers/visitors to appropriate individual or department. Adhering to state law, incumbent performs informal hearings with taxpayers which includes verifying accuracy of data, conducting market analysis, reading and interpreting USPAP Compliant Appraisals with the goal of resolution.

Performs duties of other office staff as required.

Performs related duties as assigned.

### I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma-or GED. Associates degree and/or related previous experience preferred.

Possession of and ability to maintain possession of State of Indiana Level 1 and Level 2 Assessor/Appraiser certification.

Working Extensive knowledge of Indiana State property tax code, assessing principles as determined by the International Association of Assessing Officials, and techniques and ability to apply such knowledge to a variety of interrelated processes and tasks.

Ability to maintain current knowledge of applicable statutes and guidelines and adapt to changes in procedures accordingly.

Working knowledge Practical application of English grammar, spelling, and punctuation, and ability to use standard office equipment, including but not limited to computer, keyboard, copier, fax machine, telephone, and calculator.

Knowledge of departmental functions and office procedures and ability to properly maintain official department records and documents.

Ability to effectively communicate orally and in writing with co-workers, other Monroe County departments, buyers/sellers, brokers, bankers, appraisers, realtors, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to perform the statutory duties as prescribed for the County Assessor's Office as authorized by the Assessor and State of Indiana.

Working knowledge of land surveying techniques and legal procedures concerning local property and personal taxation, with ability to apply procedures and requirements to specific tasks.

Comprehensive application of software used in the Assessor's, Auditor's, Building, Planning, Recorder and Treasurer's offices.

Ability to compute/calculate, compile, collate, and coordinate data and make determinations based on data analysis.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to work alone with minimum supervision and with others in a team environment, often amidst frequent distractions and interruptions, and under pressure from formal schedules, deadlines, and high volume operations.

Ability to work on several tasks at the same time and work rapidly for long periods, often under time pressure, and sometimes at a moments notice with little time for completion.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally work extended hours and evenings and travel out of town for training/conferences, sometimes overnight.

Possession of a valid Indiana driver's license and demonstrated safe driving record.

### II. <u>RESPONSIBILITY</u>:

Incumbent performs a flexible, customary routine with priorities determined by seasonal deadlines and service needs of the public. Incumbent has full discretion and authority allowed under the County Assessor's policies, procedures, and practices in making reassessment valuation decisions. Errors in work are detected through supervisory review and notification from other departments or agencies. Undetected errors may result in loss of money and loss of time for correction.

### III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent contact with co-workers, other County departments, City of Bloomington Departments, Town of Ellettsville Departments, Department of Local Government Finance (DLGF), buyers/sellers, brokers, bankers, realtors, attorneys, tax representatives, appraisers, title companies, Nexus Group Contractors, software vendors, and the public for a variety of purposes, including explaining and interpreting departmental policy and ensuring proper accomplishment of duties

Incumbent reports directly to Deputy/Reassessment Property Specialist Supervisor Property Director, Chief Deputy Assessor and/or County Assessor.

### IV. PHYSICAL EFFORT AND WORKING ENVIRONMENT:

Incumbent performs duties in a standard office environment, in a vehicle, and in the field, including sitting/walking at will, sitting for long periods, lifting/carrying objects weighing up to 50 pounds, close/far vision, speaking clearly, hearing sounds/communication, and driving.

Incumbent is exposed to normal hazards associated with driving a vehicle and working in the field, including exposure to inclement weather. Incumbent may be exposed to potentially irate/hostile individuals.

Incumbent occasionally works extended hours and evenings, and travels out of town for the purpose of training/conferences, occasionally overnight.

### **APPLICANT/EMPLOYEE ACKNOWLEDGEMENT**

The job description for the position of Real Estate Reassessment Specialist/Deputy for the Monroe County Assessor Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes\_\_\_\_\_No\_\_\_\_\_

Applicant/Employee signature

Date

Type or Print name

~~~~~~~~~~

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

Type or Print name

### **Employee Job Questionnaire**

### COUNTY OF MONROE, INDIANA

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

| Position Title: | Real Estate Reassessment Specialist/Deputy |
|-----------------|--------------------------------------------|
| Department:     | Assessor                                   |
| Employee Na     | me: Marissa Gallardo                       |

FLSA Status: O Exempt O Non-exempt

### • Purpose •

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- a department reorganization study
- a measure of how well you perform your duties

### Instructions

- 1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
- 2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
- 3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.

4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

### DO NOT DETACH THIS INSTRUCTION SHEET

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### Helpful Hints for Completing the Job Questionnaire

Please be aware that this project does  $\underline{NOT}$  involve performance evaluations of individuals. We aren't collecting information about <u>how</u> you perform, only <u>what</u> you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner*, *Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a "snap shot" of the basic functions of a position – it is <u>not</u> a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands <u>the essential functions and the skills necessary to perform the job</u>.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

• You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, "Maintains statistics on computer for Indiana Department of Environmental Management (IDEM)."

• Also, explain any terminology that may be unique to your department, such as report names and form numbers. For example, "*Complete XQ325 forms*" may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, "*Complete payment assistance application forms*."

• Are machines, equipment, or special tools involved in accomplishing tasks? For example, "*Post payments*" could involve a computer or writing in manual ledgers, and "*Update maps*" could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

### Section I Essential Functions of Position

#### 1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

Responsible for the reassessment of property valuation on residential, commercial, industrial, new construction and assisting the public.

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

### If Duties Section of your existing job description is accurate please note "see existing description' and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

| <b>r</b> ,                                                          | Essentiality                                                                                       | Frequency                                               |            |
|---------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|---------------------------------------------------------|------------|
| Supervise subordinate personnel                                     | <u>_B</u>                                                                                          | <u>_</u>                                                |            |
| <b>ESSENTIALITY</b>                                                 | FREQUENCY                                                                                          |                                                         |            |
| A= Marginal function of the job<br>B= Essential function of the job | C= Perform annua<br>D= Perform quart<br>E= Perform month<br>F= Perform weekly<br>G= Perform on reg | erly at a minimum<br>Ily at a minimum<br>y at a minimum |            |
| List Primary Duties:                                                |                                                                                                    |                                                         | Essen Freq |

# 1. I research, analyze, and interpret residential, commercial, industrial and agricultural property data, using field data, building permits and blueprints to develop assessments for new construction and reassessment.

2. I review county wide ongoing reassessments for new construction and existing commercial, industrial, agricultural, personal and residential property, including assisting in measuring and collecting data, inputting permits in CAD based assessment software.

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|---|-----|
|---|-----|

- 3. I process building and occupancy permits from Monroe County and track the new construction and occupancy permits as well as closely monitor building inspections
- 4. I educate and aide taxpayers in understanding property tax assessments. Including reviewing property cards, resolving complaints and diffusing irate individuals. I communicate with taxpayers using various methods such as mail, email, chat, text, zoom, telephone, and in person.
- 5. I generate comprehensive data reports by request from various county, city, state and private individuals for a variety of assessment related topics accurately, timely, and professionally.
- 6. I represent the Assessor and GIS office in a customer service role by answering telephones/greeting customers in a welcoming and friendly manner, responding to inquiries, and directing callers/visitors to appropriate individual or department.
- 7. While adhering to state law, I perform informal hearings with taxpayers which includes verifying accuracy of data.
- 8. I attend various meetings and continued education courses to maintain State required professional certifications
- I verify market data/sales with buyers, sellers, brokers, bankers, appraisers, county assessors, and others knowledgeable in real estate practices and activities.

B - G -





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- 10. I play a pivotal role in maticulously tracking and organizing permits and certificate of occupancies for new construction
- 11. I assume a pivotal role by collaborating with the Property Director and contracted third party appraisers, ensuring timely compliance with stringent property tax deadlines at both state and county level.
- 12.
- 13.



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### Section II

14.

### Job Requirements/Training/Certification

1. Check level of formal education that is <u>required</u> for your position. When specifying college degrees, please identify acceptable fields of study.

State of Indiana level 2 certified Indiana Assesor/Appraiser. Yearly continuning education for Level Certification maintenance.

3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

Knowledge of the fundamentals of real property and mass appraisal, the income approach to valuation, the guiding principles of assessment administration, math, statistics, and effective communication

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

Level 1 and Level 2 textbook and reference material. DLGF legal documents, State law and regulations. Real Estate and Commercial property lisitings. Real Estate and Commercial permit system.

5. Does your position require that you have a valid driver's license? • Yes O No If yes, for which duties? Field inspections and continuing education.

6. Does your position require you to be at least 21 years of age? O Yes ONO

#### 7. Does your position <u>require</u> passage of a:

- Medical exam? OYes ONo Drug test? OYes ONo
- Psychological exam? OYes No
- Written exam? Yes ONo

Other tests: Complete level 1, 2 and 3 assessor/appraiser certification within 4 years of hire date

### 8. Check and list equipment you operate as a regular part of performing your duties:

| Computer       | Typewriter         | Calculator       | Transcriber/dictaphone | Vehicle |
|----------------|--------------------|------------------|------------------------|---------|
| ✔ Other (Pleas | se describe) Multi | line telephone s | ystem                  |         |

# 9. Your fundamental job duties may involve some relationship between you and <u>data</u> (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that <u>most accurately</u> describe your involvement with data.

| ~ | Compare or o | bserve similarities | and differences | between data, | people, or thing | gs. |
|---|--------------|---------------------|-----------------|---------------|------------------|-----|
|---|--------------|---------------------|-----------------|---------------|------------------|-----|

- Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing operating budget, determining charges.
- Compile, collate, or classify data.
- Analyze, evaluate, observe, diagnose, investigate.
- Coordinate, place, make determinations, take action based on data analysis.
- Fabricate data to discover facts or develop concepts or interpretations.

10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that <u>most accurately</u> apply to your job responsibilities.

Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).

File, post, mail materials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).

Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).

Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

### Section III

### **Difficulty of Work/Responsibility**

- 1. Which of the following phrases best describes the type of supervision you receive?
- **Immediate supervision.** Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.

Assignments and objectives set jointly by immediate supervisor and myself. Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.

Indirect or occasional supervision. Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.

General supervision. Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.

Administrative or advisory direction from a board or CEO. Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

### 2. Which of the following phrases <u>best</u> describes the criteria for which your work is reviewed? Work is reviewed <u>primarily</u> for...

| Attainment of objectives             | Appropriate supervision or direction of assig       |                                     |
|--------------------------------------|-----------------------------------------------------|-------------------------------------|
| Compliance with precedent            | Adherence to instructions/guidelines Co             | mpliance with legal requirements    |
| Technical accuracy                   | $\Box$ Compliance with Department policy $\Box$ Ef. | fect on Department goals/objectives |
| Soundness of judgment                | Other (please describe):                            |                                     |
| <i>If you checked more than two,</i> | please provide explanation:                         |                                     |
|                                      |                                                     |                                     |

### 3. Check one of the following statements that <u>most accurately</u> describes the judgment you use in performing fundamental job duties.

- O Decisions are always determined by specific instructions or existing, well established policies and procedures.
- On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- O Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- O Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

### 4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please explain and provide examples.*

Analyzing and interpreting data on permits and blueprints for the county to ensure that information is accurate before third party contracted field reviewers complete site visits of the property.

#### 5. What programs, persons and/or functions are directly affected by the decisions you make?

Monroe County property owners, Assessor's office, Auditor's office, and Treasurer's office

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

Using analyzed sales and field data to produce property value. Monroe County Assesor and Property Director can overrule my decision.

### Section IV

### Personal Work Relationship/Supervisory

1. What is the name and position title of your immediate supervisor?

Supervisor: Laura "Shelly" Jordan Tit

Title: Property Director

#### 2. Complete A) and B) only if you supervise or direct the work of others:

### A) List names and position titles of employees you supervise or direct as a regular part of your duties.

| B) (                                                                                                                                             | Check which statements most accurately describe your managerial/supervisory responsibilities.                                                                             |  |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|
|                                                                                                                                                  | Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.                                     |  |  |
|                                                                                                                                                  | Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.                                                        |  |  |
|                                                                                                                                                  | Interview candidates for openings and make hiring recommendations.                                                                                                        |  |  |
|                                                                                                                                                  | Make hiring decisions.                                                                                                                                                    |  |  |
|                                                                                                                                                  | Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.                        |  |  |
|                                                                                                                                                  | Plan, delegate and control work assignments and special projects to assigned staff.                                                                                       |  |  |
|                                                                                                                                                  | Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.                                                                 |  |  |
|                                                                                                                                                  | Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.                                                                      |  |  |
|                                                                                                                                                  | Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.                      |  |  |
|                                                                                                                                                  | Evaluate the performance results of assigned staff. Discuss present and past performance with each person.<br>Keep supervisor informed of performance discussion results. |  |  |
|                                                                                                                                                  | Review salaries of assigned staff and recommend changes when warranted.                                                                                                   |  |  |
|                                                                                                                                                  | Recommend personnel actions, such as promotions, transfers, demotions.                                                                                                    |  |  |
|                                                                                                                                                  | Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.                                  |  |  |
|                                                                                                                                                  | Maintain discipline and recommend corrective action as warranted.                                                                                                         |  |  |
|                                                                                                                                                  | Communicate and administer personnel programs and procedures for my area in accordance with approved policies.                                                            |  |  |
| <b>3.</b> I                                                                                                                                      | ist other departments, agencies, organizations, and others with whom you regularly communicate.                                                                           |  |  |
|                                                                                                                                                  | Auditor, Treasurer, IAAO, DLGF, INCAMA, GIS, HAND, Monroe County Planning/ Building,<br>Ellettsville Planning/ Building, Nexus Group                                      |  |  |
| 4. Check which statements <u>most accnrately</u> describe your contact with employees, customers, governmental officials, or the general public. |                                                                                                                                                                           |  |  |
| ~                                                                                                                                                | <b>Cooperative Work Relationship:</b> Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.                  |  |  |
| ~                                                                                                                                                | <b>Render Service:</b> Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.                          |  |  |
| ~                                                                                                                                                | <b>Instruct:</b> Teach or present subject matter to others through explanation, demonstration and supervised practice.                                                    |  |  |
| ~                                                                                                                                                | <b>Negotiate:</b> Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.  |  |  |

Mentor: Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

### Section V

# Physical Effort/Work Environment 1. Which of the following best describes your primary working environment? □ Laboratory ☑ Standard office □ Storeroom □ Vehicle

Garage/shop

Manufacturing setting

☐ Other (please describe):

Essentiality

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ĺΒ

B

B

Outdoors

work with others in a team environment

understand and carry out oral instructions

present findings in oral or written form

work rapidly for long periods

memorize and retain instructions

testify in legal proceedings/court

*If you checked more than one, please provide additional explanation.* 

### 2. Which of the following best describes your <u>primary</u> working conditions? <u>ESSENTIALITY</u>

N/A= Not Applicable to job A= Marginal requirement of job B= Essential requirement of job

### **Essentiality**

В

В

B

В

В

ĺΒ

B

В

A

В

A

work alone with minimum supervision

work under time pressure

work on several tasks at the same time

read/carry out simple written instructions

▼ apply knowledge of people, locations

plan and layout assigned work projects

compute/calculate, such as interest

count, make simple arithmetic additions/subtractions

read/interpret detailed prints, sketches, layouts, specifications, maps

repare detailed reports, such as financial statements, sales activity, product feasibility

plan and present public speaking presentations, fund raisers, special events

sitting & walking at will

standing/walking for long periods

sitting for long periods

ĺN/A

| N/A work in extreme hot or cold temperatu          | res               | N/A worl               | in wet/icy surroundings                                             |            |  |
|----------------------------------------------------|-------------------|------------------------|---------------------------------------------------------------------|------------|--|
| N/A respond to emergencies from off-duty           | status            | N/A work               | with or near chemicals (pl                                          | ease list) |  |
| N/A work near fumes, odors, dust, dirt (plea       | ase describe)     |                        | often irate taxpayers                                               |            |  |
| N/A work in a noisy environment (describe          | noise source)     | assessmen              | demanding explanations of tax<br>assessments, especially during tax |            |  |
| N/A work in confined areas (please describe        | e)                | season                 |                                                                     |            |  |
| N/A wear protective clothing or equipment          | (please describe  |                        |                                                                     |            |  |
| N/A work in high places, such as ladders, re       | oofs, bucket true | ck (please desci       | ibe)                                                                |            |  |
| A work with or exposed to violent/irate in         | ndividuals (plea  | se describe)           |                                                                     |            |  |
| N/A respond to situations involving potentia       | al physical harn  | n to self and oth      | ers (please describe)                                               |            |  |
| B 🚽 lifting under 25 pounds 🛛 💌 lifti              | ing 25 to 50 pou  | inds A                 | lifting over 50 pounds                                              |            |  |
| B ▼ pushing/pulling objects B ▼ car                | rying objects     | A                      | crouching/kneeling                                                  |            |  |
| B bending at waist B read                          | ching             | A                      | driving                                                             |            |  |
| B ▼ close vision A ▼ far                           | vision            | В                      | color perception                                                    |            |  |
| $B \checkmark$ depth perception $B \checkmark$ spe | aking clearly     | В                      | hearing sounds/commun                                               | nication   |  |
| B ▼ handling/grasping objects B ▼ fing             | gering objects (J | picking, pinchin       | ng)                                                                 |            |  |
| 3. List the three most physically demandin         | g activities you  | ı <u>regularly</u> per | form in your job.                                                   |            |  |
| standing and sitting for long periods of time      |                   | · · · · ·              |                                                                     |            |  |
| lifting boxes, record and training material        |                   |                        |                                                                     |            |  |
| Extended periods of time infront of a computer     | screen            |                        |                                                                     |            |  |
| 4. List the three most emotionally demand          | ing activities y  | ou <u>regularly</u> p  | erform in your job.                                                 |            |  |
| Dealing with hostile taxpayers in the office or o  | ver the phone     |                        |                                                                     |            |  |
| Stressful deadlines                                |                   |                        |                                                                     |            |  |
| Technical failures                                 |                   |                        |                                                                     |            |  |
| 5. What is your normal work schedule (exa          | ample, 8 a.m. 4   | p.m. M-F)?             |                                                                     |            |  |
| 8 a.m - 4 p.m M-F                                  |                   |                        |                                                                     |            |  |
|                                                    | Never             | Regularly              | Occasionally                                                        |            |  |
| 6. Are you required to:<br>a. work extended hours  | $\cap$            | <u>Regulariy</u>       | •                                                                   |            |  |
|                                                    | 0                 | 0                      | _                                                                   |            |  |
| b. work weekends                                   | 0                 | 0                      | $oldsymbol{\Theta}$                                                 |            |  |

|                                                            | Never | Regularly | <b>Occasionally</b> |
|------------------------------------------------------------|-------|-----------|---------------------|
| c. work evenings                                           | 0     | 0         | 0                   |
| d. travel out of town, but not overnight For what purpose? | 0     | 0         | ۲                   |
| Continued Education and confrences                         |       |           |                     |
| c. travel out of town overnight<br>For what purpose?       | 0     | 0         | ۲                   |
| Continued Education and confrences                         |       |           |                     |
| f. respond to emergencies on 24-hr basis                   | 0     | 0         | 0                   |
| g. on call on rotation basis                               | 0     | 0         | 0                   |

7. Provide any other examples/information which would be helpful in understanding the physical and = mental requirements of your job.

8. Is your position politically appointed by a recognized Department Head or Elected Official according to= IC 36-2-16-4? Yes O No O

### Section VI

### Certifications

Employee: I certify that the above statements are an accurate and fair description of my position.

| Name (print or type) Marissa Gallardo            | Hire date 7/6/2021 |  |
|--------------------------------------------------|--------------------|--|
| Title Real Estate Reassessment Specialist/Deputy | Department Assesor |  |
| Signature                                        | Date               |  |
|                                                  |                    |  |

*Supervisor:* I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes  $\bigcirc$  No  $\bigcirc$ 

| Signature | C | whet alt | Date | 9-15-23 |  |
|-----------|---|----------|------|---------|--|
|           |   |          |      |         |  |

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc. 118 South Franklin Street Muncie, IN 47305 Phone: (765) 286-5195 Fax: (765) 286-2824

### POSITION DESCRIPTION COUNTY OF MONROE, INDIANA

POSITION:Real Estate Reassessment Specialist Assistant Property Director/DeputyDEPARTMENT:AssessorWORK SCHEDULE:As assignedJOB CATEGORY:COMOT (Computer, Office Machine Operation, Technician)PAT B (Professional, Administrative, Technological)DATE WRITTEN:September 2005STATUS:Full-timeDATE REVISED:May 2015, February 2021, September 2023FLSA STATUS:Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Real Estate Reassessment Specialist/Deputy for the Monroe County Assessor's Office, responsible for the reassessment of non-movable property valuation on residential, commercial, industrial, and new construction and assisting the public. Aides Property Director in processing reports, providing quality control, and tracking progress in new construction and reassessment books. Advises Personal Property Division in matters related to Business Tangible Personal Property and Annually Assessed Mobile Homes.

### **DUTIES:**

Reviews, analyzes, and interprets residential property data, using data to develop assessments for new construction. Sketches dwellings and enters property information into computer, making necessary corrections to property record cards as needed. Researches, analyzes, and interprets residential property data, using field data, building permits and blueprints to develop assessments for new construction. Uses CAD based assessment software to sketch building outlines and create property information and make necessary updates to property record cards.

Verifies market data/sales with buyers, sellers, brokers, bankers, appraisers, county assessors, and others knowledgeable in real estate practices and activities. Investigates market and sales data with buyers, sellers, real estate brokers, bankers, appraisers, other County Assessors and additional professionals knowledgeable in real estate practices and activities.

Reviews county wide ongoing reassessments for new construction and existing commercial industrial, agricultural and residential property, including assisting in measuring and collecting data, inputting permits in Nexus system in CAD based assessment software, verifying work, and ensuring the value on a parcel matches data and is accurate with the style of structure. Assisting with quality control, and ensuring the value on a parcel is accurate. Serves in constant collaboration with Nexus Group.

Processes building and occupancy permits submitted to department, including receiving monthly from Building Department, sorting by township, making copies, and distributing as appropriate. Entersbuilding and occupancy permits into spreadsheet and provides reassessment data on real property abatements. Processes building and occupancy permits from Monroe County and Ellettsville Building Department. Tracks new construction building and occupancy permits for taxation purposes and closely monitors inspector data for property completion. Assists software vendors in developing customized software for use in department operations and educates and trains staff members on GIS software. Collaborates with software vendors in developing customized software for use in department operations and educates and trains staff members on assessment and GIS software and procedures.

Prepares, prints, and mails notices to taxpayers as alterations are made to property records, including new construction, corrections, or adjustments.

Assists taxpayers with understanding assessments, including reviewing property card, explaining information, and resolving complaints. Educates and aides taxpayers in understanding property assessments, including reviewing property card, answering questions, explaining information, resolving complaints and diffusing irate individuals to aide in their understanding. Communicates with taxpayers using various methods such as mail, email, chat, text, zoom, telephone, and in person.

Communicates with Auditor all valuation changes that need to be made to Taxing Increment Finance (TIF) according to State timeline. Provides Auditor valuation changes, and explanations for parcels within Taxing Increment Finance (TIF) Districts. Maintains new construction and valuation changes within TIF related parcels within assessment system.

Researches legal documents to ensure correct platting of property descriptions, and property in use. Including deeds, surveys, resolutions, court orders, declarations, plats, covenants and restrictions, mortgages, leases and contracts.

Prepares reports annually and performs check and balances prior to submitting reports to State as required. Generates comprehensive data reports by request from various county, city, state and private individuals for a variety of assessment related topics accurately, timely, and professionally.

Attends various meetings and attends training sessions as required or needed. Attends various meetings and continued education courses to maintain State required professional certifications.

Answers telephone, determines nature of call, answers questions or directs to appropriate individual or agency. Assists citizens at the county by answering questions, making copies of documents, or directing to appropriate individual or office. Represents the Assessor and GIS office in a customer service role by answering telephones/greeting customers in a welcoming and friendly manner, responding to inquiries, and directing callers/visitors to appropriate individual or department. Adhering to state law, incumbent performs informal hearings with taxpayers which includes verifying accuracy of data, conducting market analysis, reading and interpreting USPAP Compliant Appraisals with the goal of resolution.

Advises and provides quality control for Business tangible personal property and annually assessed mobile homes data that is submitted to the Auditor, Department of Local Government Finance, Legislative Services Agency,

Performs duties of other office staff as required.

Performs related duties as assigned.

### I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma-or GED. Associates degree and/or related previous experience preferred.

Possession of and ability to maintain possession of State of Indiana Level 1 and Level 2 Assessor/Appraiser certification.

Working Extensive knowledge of Indiana State property tax code, assessing principles as determined by the International Association of Assessing Officials, and techniques and ability to apply such knowledge to a variety of interrelated processes and tasks.

Ability to maintain current knowledge of applicable statutes and guidelines and adapt to changes in procedures accordingly.

Working knowledge Practical application of English grammar, spelling, and punctuation, and ability to use standard office equipment, including but not limited to computer, keyboard, copier, fax machine, telephone, and calculator.

Knowledge of departmental functions and office procedures and ability to properly maintain official department records and documents.

Ability to effectively communicate orally and in writing with co-workers, other Monroe County departments, buyers/sellers, brokers, bankers, appraisers, realtors, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to perform the statutory duties as prescribed for the County Assessor's Office as authorized by the Assessor and State of Indiana.

Working knowledge of land surveying techniques and legal procedures concerning local property and personal taxation, with ability to apply procedures and requirements to specific tasks.

Comprehensive application of software used in the Assessor's, Auditor's, Building, Planning, Recorder and Treasurer's offices.

Ability to compute/calculate, compile, collate, and coordinate data and make determinations based on data analysis.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to work alone with minimum supervision and with others in a team environment, often amidst frequent distractions and interruptions, and under pressure from formal schedules, deadlines, and high

volume operations.

Ability to work on several tasks at the same time and work rapidly for long periods, often under time pressure, and sometimes at a moments notice with little time for completion.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally work extended hours and evenings and travel out of town for training/conferences, sometimes overnight.

Possession of a valid Indiana driver's license and demonstrated safe driving record.

### II. <u>RESPONSIBILITY</u>:

Incumbent performs a flexible, customary routine with priorities determined by seasonal deadlines and service needs of the public. Incumbent has full discretion and authority allowed under the County Assessor's policies, procedures, and practices in making reassessment valuation decisions. Errors in work are detected through supervisory review and notification from other departments or agencies. Undetected errors may result in loss of money and loss of time for correction.

### III. <u>PERSONAL WORK RELATIONSHIPS:</u>

Incumbent maintains frequent contact with co-workers, other County departments, City of Bloomington Departments, Town of Ellettsville Departments, Department of Natural Resources (DNR), and Department of Local Government Finance (DLGF), Indiana Legislative Services Agency (LSA), buyers/sellers, brokers, bankers, realtors, attorneys, tax representatives, appraisers, title companies, Nexus Group Contractors, software vendors, and the public for a variety of purposes, including explaining and interpreting departmental policy and ensuring proper accomplishment of duties

Incumbent reports directly to Deputy/Reassessment Property Specialist Supervisor Property Director, Chief Deputy Assessor and/or County Assessor.

### IV. PHYSICAL EFFORT AND WORKING ENVIRONMENT:

Incumbent performs duties in a standard office environment, in a vehicle, and in the field, including sitting/walking at will, sitting for long periods, lifting/carrying objects weighing up to 50 pounds, close/far vision, speaking clearly, hearing sounds/communication, and driving.

Incumbent is exposed to normal hazards associated with driving a vehicle and working in the field, including exposure to inclement weather. Incumbent may be exposed to potentially irate/hostile individuals.

Incumbent occasionally works extended hours and evenings, and travels out of town for the purpose of training/conferences, occasionally overnight.

### **APPLICANT/EMPLOYEE ACKNOWLEDGEMENT**

The job description for the position of Real Estate Reassessment Specialist/Deputy for the Monroe County Assessor Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes\_\_\_\_No\_\_\_\_

Applicant/Employee signature

Date

Type or Print name

~~~~~~~~~~~

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

Type or Print name

Date 9/13/2023

### **Employee Job Questionnaire**

### COUNTY OF MONROE, INDIANA

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

Position Title: Ass	istant Propert	y Director
Department: Mon	roe County As	ssessor's Office
Employee Name:	Charlotte Moa	
FLSA Status:	Exempt	• Non-exempt
		• Purpose •

### This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- · a department reorganization study
- a measure of how well you perform your duties

### Instructions

- 1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
- 2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
- 3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.

4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

### DO NOT DETACH THIS INSTRUCTION SHEET

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### Helpful Hints for Completing the Job Questionnaire

Please be aware that this project does <u>NOT</u> involve performance evaluations of individuals. We aren't collecting information about <u>how</u> you perform, only <u>what</u> you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner*, *Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a "snap shot" of the basic functions of a position – it is <u>not</u> a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands <u>the essential functions and the skills necessary to perform the job</u>.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

• You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, "Maintains statistics on computer for Indiana Department of Environmental Management (IDEM)."

• Also, **explain any terminology that may be unique to your department**, such as report names and form numbers. For example, "*Complete XQ325 forms*" may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, "*Complete payment assistance application forms*."

• Are machines, equipment, or special tools involved in accomplishing tasks? For example, "*Post payments*" could involve a computer or writing in manual ledgers, and "*Update maps*" could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

### Section I

### **Essential Functions of Position**

1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

I aide The Property Director on the valuations of agricultural, residential, commercial, industrial, and new construction.

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

## If Duties Section of your existing job description is accurate please note "see existing description' and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

	Essentiality	Frequency
Supervise subordinate personnel	<u></u>	G
<b>ESSENTIALITY</b>	<b>FREQUENCY</b>	
A= Marginal function of the job B= Essential function of the job	C= Perform annua D= Perform quarte E= Perform month F= Perform weekly G= Perform on reg	erly at a minimum ly at a minimum v at a minimum

### List Primary Duties:

- Researches, analyzes, and interpret residential, commercial, industrial and agricultural property data, using field data, building permits and blueprints to develop assessments for new construction and reassessment.
- Investigates market and sales data with buyers, sellers, real estate brokers, bankers, appraisers, other County Assessors and additional professionals knowledgeable in real estate practices.



Essen Freq

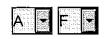
- Reviews county wide ongoing reassessments for new construction and existing commercial, industrial, agricultural, personal and residential property, including assisting in measuring and collecting data, inputting permits in CAD based assessment software.
- Processes building and occupancy permits from Monroe County and Ellettsville Building Department. I also track the new construction and occupancy permits as well as closely monitor building inspections.
- Collaborates with software vendors in developing customized software for use in department operations and educates and trains staff members on assessment and GIS software and procedures.
- Educates and aide taxpayers in understanding property tax assessments. Including reviewing property cards, resolving complaints and diffusing irate individuals. I communicate with taxpayers using various methods such as mail, email, chat, text, zoom, telephone, and in person.
- Provides the Auditor's Office valuation changes, and explanations for parcels within Taxing Increment Finance (TIF) Districts. Maintains new construction and valuation changes within TIF related parcels within assessment system.
- Researches legal documents to ensure correct platting of property descriptions, and property in use. Including deeds, surveys, resolutions, court orders, declarations, plats, covenants and restrictions, mortgages, leases, contracts and affidavits to transfer to real estate.
- Generates comprehensive data reports by request from various county, city, state and private individuals for a variety of assessment related topics accurately, timely, and professionally.

# B











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- Aides in creating new neighborhood groupings, land values and related factors based on extensive market research on newly platted developments, or stratified existing subdivisions.
- 11. Advise and provide quality control for Business Tangible Personal Property and Annually Assessed Mobile Homes data that is submitted to the Auditor, Department of Local Government Finance, Legislative Services Agency.
- 12. Represents the Assessor and GIS office in a customer service role by answering telephones/greeting customers in a welcoming and friendly manner, responding to inquiries, and directing callers/visitors to appropriate individual or department.
- 13. While adhering to state law, I incumbently perform informal hearings with taxpayers which include verifying accuracy of data, conducting market analysis, reading and interpreting USPAP Compliant Appraisals with the goal of resolution.
- 14. Aides in preparing monthly and annually checks and balances prior to submitting reports to State as required.

### Section II

### Job Requirements/Training/Certification

1. Check level of formal education that is <u>required</u> for your position. When specifying college degrees, please identify acceptable fields of study.

High school diploma/GED	Associate Degree	Baccalaureate Degree	Masters Degree
Other (Please describe):			
Acceptable fields of study: Busi	ness, finance		
2. Specialized training, certifi Public Accountant).	cation, and/or specific	e experience <u>required</u> for y	your position (such as Certified
State of Indiana Level 3 Ind level certification maintenar		alser Certification. Yearly	continuing education for









BEE		В		E		
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## 3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

Knowledge of the fundamentals of real property and mass appraisal, the income approach to valuation, the guiding principles of assessment administration, practices of the Uniform Standards of Professional Appraisal Practice (USPAP), math, statistics, and effective communication.

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

International Association of Assessing Officers (IAAO) works, All level 3 textbooks and reference materials, DLGF legal documents, State Law and legislation, real estate and commercial property listing publications.

- 5. Does your position require that you have a valid driver's license? Yes No If yes, for which duties? Site visits, continuing education
- 6. Does your position require you to be at least 21 years of age? Yes No

#### 7. Does your position require passage of a:

Medical exam?YesNoDrug test?YesNoPsychological exam?YesNoWritten exam?YesNo

Other tests: Level I, II, and III certification within 4 years of hire date

### 8. Check and list equipment you operate as a regular part of performing your duties:

Computer	Typewr	iter 🔽 Calculato	r Transcriber/dictaphon	ne 🗹 Vehicle
Other (Pleas	e describe)			

# 9. Your fundamental job duties may involve some relationship between you and <u>data</u> (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that <u>most accurately</u> describe your involvement with data.

Compare or observe similarities and differences between data, people, or things.

- Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing operating budget, determining charges.
- Compile, collate, or classify data.
- Analyze, evaluate, observe, diagnose, investigate.

Coordinate, place, make determinations, take action based on data analysis.

Fabricate data to discover facts or develop concepts or interpretations.

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# 10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that <u>most accurately</u> apply to your job responsibilities.

- Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).
- File, post, mail materials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).
- Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).
- Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

### Section III

### **Difficulty of Work/Responsibility**

- 1. Which of the following phrases best describes the type of supervision you receive?
- **Immediate supervision.** Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- Assignments and objectives set jointly by immediate supervisor and myself. Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- Indirect or occasional supervision. Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- General supervision. Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- Administrative or advisory direction from a board or CEO. Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

# 2. Which of the following phrases <u>best</u> describes the criteria for which your work is reviewed? Work is reviewed <u>primarily</u> for...

Attainment of objectives	Appropriate supervision or direction of assigned operations
Compliance with precedent	
Technical accuracy	Compliance with Department policy Effect on Department goals/objectives
Soundness of judgment	Other (please describe):
If you checked more than two,	please provide explanation:

## 3. Check one of the following statements that <u>most accurately</u> describes the judgment you use in performing fundamental job duties.

- Decisions are always determined by specific instructions or existing, well established policies and procedures.
- On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please* explain and provide examples.

Analyzing and interpreting field data to effectivly assess property. As an example, using collected field data and sales to identify the best method to affect market value.

#### 5. What programs, persons and/or functions are directly affected by the decisions you make?

Monroe County property owners, The Auditor's office, The Treasurer's Office, and The Assessor's Office.

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

Using analyzed sales and field data to produce property value. Those that can overrule me are the Property Director and Monroe County Assessor.

### Section IV

### Personal Work Relationship/Supervisory

1. What is the name and position title of your immediate supervisor?

Supervisor: Laura "Shelly" Jordan Title: Property Director

2. Complete A) and B) only if you supervise or direct the work of others:

#### A) List names and position titles of employees you supervise or direct as a regular part of your duties.

B) (	Check which statements most accurately describe your managerial/supervisory responsibilities.
	Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.
	Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.
	Interview candidates for openings and make hiring recommendations.
	Make hiring decisions.
V	Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.
	Plan, delegate and control work assignments and special projects to assigned staff.
	Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.
	Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.
	Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.
	Evaluate the performance results of assigned staff. Discuss present and past performance with each person. Keep supervisor informed of performance discussion results.
	Review salaries of assigned staff and recommend changes when warranted.
	Recommend personnel actions, such as promotions, transfers, demotions.
	Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.
	Maintain discipline and recommend corrective action as warranted.
	Communicate and administer personnel programs and procedures for my area in accordance with approved policies.
3. L	list other departments, agencies, organizations, and others with whom you regularly communicate.
	Auditor, Treasurer, IAAO, DLGF, INCAMA, GIS, HAND, Monroe County Planning/ Building, Ellettsville Planning/ Building
	Check which statements <u>most accurately</u> describe your contact with employees, customers, governmental icials, or the general public.
4	<b>Cooperative Work Relationship:</b> Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.
~	<b>Render Service:</b> Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.
•	<b>Instruct:</b> Teach or present subject matter to others through explanation, demonstration and supervised practice.
V	<b>Negotiate:</b> Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.

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Mentor: Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

### Section V **Physical Effort/Work Environment** 1. Which of the following best describes your primary working environment? Storeroom Outdoors Vehicle Laboratory Standard office Other (please describe): Manufacturing setting Garage/shop If you checked more than one, please provide additional explanation. 2. Which of the following best describes your primary working conditions? ESSENTIALITY N/A= Not Applicable to job A= Marginal requirement of job B= Essential requirement of job Essentiality Essentiality work with others in a team environment work alone with minimum supervision Β work rapidly for long periods work under time pressure B understand and carry out oral instructions work on several tasks at the same time B memorize and retain instructions read/carry out simple written instructions В present findings in oral or written form

apply knowledge of people, locations

R

В

В

В

B

plan and layout assigned work projects

compute/calculate, such as interest

count, make simple arithmetic additions/subtractions

read/interpret detailed prints, sketches, layouts, specifications, maps

prepare detailed reports, such as financial statements, sales activity, product feasibility

plan and present public speaking presentations, fund raisers, special events

sitting & walking at will

standing/walking for long periods

В

sitting for long periods

testify in legal proceedings/court

walking on uneven terrain

A work in extreme hot or col	d temperatures	N/A work i	n wet/icy surroundings
N/A - respond to emergencies fro	om off-duty status	N/A work v	with or near chemicals (please list)
N/A work near fumes, odors, du	ust, dirt (please describe)		irate tax payers demanding about assessments via
N/A work in a noisy environme	ent (describe noise source)	phone or in r	
N/A work in confined areas (pl	ease describe)		
N/A wear protective clothing of	r equipment (please describ	e)	
N/A - work in high places, such a	as ladders, roofs, bucket tru	ck (please descri	pe)
A work with or exposed to vi	iolent/irate individuals (plea	ase describe)	
N/A - respond to situations invol	ving potential physical harr	n to self and othe	rs (please describe)
B lifting under 25 pounds	A 💽 lifting 25 to 50 po	unds N/A 🝷	lifting over 50 pounds
A pushing/pulling objects	B 🔽 carrying objects		crouching/kneeling
A bending at waist	B reaching	A	driving
B close vision	B 🔄 far vision	B	color perception
B depth perception	B 💽 speaking clearly		hearing sounds/communication
B handling/grasping objects	B S fingering objects (	picking, pinching	g)
3. List the three most physical Standing and sitting for extended	-	u <u>regularly</u> perf	orm in your job.
Lifting heavy boxes, records, and			
Extended periods of time infront			
4. List the three most emotions		on regularly ne	rform in your job
Dealing with hostile taxpayers on	•	ou <u>regulariy</u> pe	
Stressful deadlines			
Technical failures			
5. What is your normal work s	schedule (example, 8 a.m.	4 p.m. M-F)?	
8 A.M. to 4 P.M. M-F			
	Never	Regularly (	Occasionally
<ul><li>6. Are you required to:</li><li>a. work extended hours</li></ul>	0	0	0
b. work weekends	0	0	0

	Never	<b>Regularly</b>	<b>Occasionally</b>
c. work evenings	0	0	0
d. travel out of town, but not overnight For what purpose?	0	0	۲
Continued education			
c. travel out of town overnight For what purpose?	0	0	۲
Conference/ continued education			
f. respond to emergencies on 24-hr basis	0	0	0
g. on call on rotation basis	۲	0	0

7. Provide any other examples/information which would be helpful in understanding the physical and = mental requirements of your job.

Producing critical information within short periods of time.

8. Is your position politically appointed by a recognized Department Head or Elected Official according to= IC 36-2-16-4? Yes O No O

### Section VI

### **Certifications**

Employee: I certify that the above statements are an accurate and fair description of my position.

Name (print or type) Charlotte Moat	Hire date 01/02/2017
Title Real Estate Reassessment Specialist/ Deputy	Department Assessor
Signature	Date 09/13/2023

*Supervisor:* I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes  $\bigcirc$  No  $\bigcirc$ 

Signature		latt &	2	6
	- 11		-	

Date 09/13/2023

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc. 118 South Franklin Street Muncie, IN 47305 Phone: (765) 286-5195 Fax: (765) 286-2824

### POSITION DESCRIPTION COUNTY OF MONROE, INDIANA

<b>POSITION:</b>	Sales Disclosure Supervisor/Deputy
	Market Data Analysis Administrator/Deputy
<b>DEPARTMENT:</b>	Assessor
WORK SCHEDULE:	<del>8:00 a.m. – 4:00 p.m., M-F</del> As Assigned
JOB CATEGORY:	<b>COMOT (Computer, Office Machine Operation, Technician)</b>
	PAT C (Professional, Administrative, Technological)
<b>DATE WRITTEN: January</b>	2007 STATUS: Full-time
DATE REVISED: February	<b>2021 Sept 2023</b> FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Sales Disclosure Supervisor/Deputy Market Data Analysis Administrator/Deputy for the Monroe County Assessor's Office, responsible for managing sales disclosures and market research related to Monroe filed in the County, providing and analyzing data used for real estate assessed values to facilitate the proper assessment of all county properties, and supervises, mentors and trains assigned staff.

### **DUTIES:**

Supervises assigned staff, including interviewing candidates and making hiring recommendations, providing orientation and training staff, planning, delegating, and controlling work assignments, reviewing and approving work products and assignments, evaluating performance, maintaining discipline, and communicating and administering personnel programs and procedures. Mentors and trains staff on the proper handling of sales transfers and the processes needed to comply with state law.

Serves as Lead for Manages the internal control team, reviewing and recommending changes to department operations.

Analyzes all data implementing changes to sales disclosure protocols as needed. Prepares and evaluates technical data, ensuring sales disclosure program is complete and meets state requirements. Coordinates and processes according to applicable state and county codes, legal documents, transferring property ownership and interest into the county's permanent records. Maintains and continually updates computer records, entering, changing and deleting data as necessary.

Approves sales disclosures submitted through e-filing and hard copies received from title companies, attorneys, and citizens, including verifying inclusion of appropriate information and returning of incomplete forms for resubmission once corrected.

Collects sales disclosures from Auditor after they are filed and inserts missing information, including assessed valuations, neighborhood and property codes, and taxing districts. Determines new construction status as required. Verifies sales prices and determines validity, including contacting title companies, sellers, and/or buyers. Enters sales disclosure information in Computer Assisted Mass

Appraisal Software provider. Investigates MLS, GIS and Realtor market resources to determine the validity of sales for compliance to state mandated sales ratio standards.

Supports integration of tax system data into assessment system. Acts as quality control for transfer, legal description, and plat data.

Supports the updating and maintenance of all County plat books, GIS system attributes, geo-mapping of County plat information from survey documents, various property transactions, and develops and implements procedural guidelines.

Contributes to county-wide ongoing reassessment for new construction and existing commercial, industrial, agricultural and residential property, including measuring and collecting data, inputting permits, administering quality control, and ensuring the value on a parcel is accurate.

Researches, analyzes, and interprets residential property data, using field data, building permits and blueprints to develop assessments for new construction. Uses CAD based assessment software to sketch building outlines and create property information and make necessary updates to property record cards. Notifies taxpayers of assessment changes as required. Investigates homestead deductions and fee requirements on transfers, reviewing deeds to confirm compliance with state law.

Working knowledge of GIS computer procedures and ability to apply such knowledge to a variety of interrelated processes, tasks and operations.

Assists with data creation, editing and maintenance of GIS and INCama, correcting errors and communicating issues with other county offices and GIS/INCama when appropriate.

Scans sales disclosures for use on geographic information systems (GIS) website and for data entry, ensuring telephone numbers are omitted as required. Verifies proper scanning of documents, including typing handwritten information to ensure readability by scanner. Scans sales disclosures released before implementation of scanning process to make records current, on a weekly basis provides redacted, scanned copies of sales disclosures to the Herald Times newspaper for publication. Distributes quality controlled sales data for use on the GIS website. Communicates appropriate sales information to local newspapers for publication.

Works closely with contracted vendors, investors and business owners to investigates commercial sales and assessments to effectively equalize commercial class groups across the county to better represent market values for proper assessment.

Verifies market data with buyers, sellers, brokers, bankers, appraisers, county assessors, and others knowledgeable in real estate practices and activities. Analyzes residential sales for trends related to market activity. Utilizes data to perform sales ratio studies that will affect changes in neighborhood assessments to better reflect the market shifts in county property values.

Completes a monthly reconciliation of all sales disclosures to ensure accuracy of data entry once reconciled data is downloaded to the state Gateway system. and to look for discrepancies and patterns that could affect county wide assessment, updating and communicating changes as necessary.

Coordinates, processes and maintains all county sales records. Manages the filing system of current and past sales, analyzing data for patterns and errors that affect assessed values throughout the county.

Prepares, provides quality control and transmits annual monthly data files to Department of Local Government Finance, Legislative Services Agency, and other County departments as required. Researches, corrects, and submits data not deemed compliant by DLGF. Prepares reports annually and performs checks and balances prior to submitting reports to state as required.

Investigates and reviews classified forests, homestead deduction, developer discounts, and agricultural property for compliance with state law. Corrects and communicates to taxpayers and county offices as appropriate.

Conducts research of legal documents to ensure correct platting of property descriptions and property in use. Including deeds, surveys, resolutions, court orders, declarations, plats, mortgages, leases and contracts.

Severs as contact person with software vendors, resolving problems and determining solutions.

Answers telephone, determines nature of call, answers questions, or directs to appropriate individual or agency. Assists citizens at the counter by answering questions, making copies of documents, or directing to appropriate individual or office. Assists individuals with locating real estate, property identification numbers (PIN), addresses and property owners. Verifies taxation amounts for various periods and parcels on owner request. Prepares necessary forms and records related to the transfer of property deeds within the county. Enters appropriate information into computer files, creates fees for processing and completion of transfer activities, working closely with the auditor and recorder offices as appropriate.

Distributes information and responds to inquiries from the public, title preparatory offices, attorneys, and other county offices in how to properly use sales disclosures to transfer property interests. Answers questions to train individuals for state compliance.

Adhering to state law incumbent performs informal hearings with taxpayers which includes verifying accuracy of data, conducting market analysis, reading and interpreting USPAP Compliant Appraisals with the goal of resolution.

Assists taxpayers with understanding assessments, including reviewing property record cards, explaining information and resolving complaints.

Maintains current knowledge of real estate market by reading related publications. Participates in continued education required by State Law to maintain job certifications throughout the year.

Maintain working knowledge of State and County laws regarding real estate, deduction, and associated legal procedures concerning local property and personal taxation, with ability to apply procedures and requirements to a specific task.

Maintains knowledge of all computer software programs used by the assessor, recorder and auditor's offices.

Performs duties of other office staff as required. Manages multiple tasks at once, works in multiple departments daily.

Performs related duties as assigned.

### I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma or GED. Associates degree and/or related previous experience preferred.

Possession of and ability to maintain possession of level 3 assessor/appraiser certification.

Working knowledge of state of Indiana property tax code, sales disclosure regulations, and assessing principles according to the International Association of Assessing Officials (IAAO) and techniques and ability to apply such knowledge to a variety of interrelated processes and tasks.

Knowledge of English grammar, spelling, and punctuation and the ability to use standard office equipment, including but not limited to computer, keyboard, copier, fax machine, telephone, scanner, and calculator.

Comprehensive knowledge of software used in the assessor, auditor, building, planning, treasurer and recorder's offices.

Knowledge of departmental functions and office procedures and ability to properly maintain official department records and documents.

Ability to perform the statutory duties as prescribed for the County Assessor's Office as authorized by the Assessor.

Ability to effectively communicate orally and in writing with co-workers, other County departments, title companies, attorneys, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to supervise assigned staff, including interviewing candidates and making hiring recommendations, providing orientation and training staff, planning, delegating, and controlling work assignments, reviewing and approving work products and assignments, evaluating performance, maintaining discipline, and communicating and administering personnel programs and procedures.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct. Ability to competently serve the public with diplomacy and respect, including occasional encounters

with irate/hostile persons.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, often under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally work extended hours and travel out of town for training/conferences, sometimes overnight.

### II. <u>RESPONSIBILITY:</u>

Incumbent has full discretion and authority allowed under county assessment policies, procedures, and practices and is authorized to make assessment valuation decisions independent of county assessor. Incumbent provides and analyzes data used for real estate assessed values to facilitate the proper assessment of all county properties, and supervises, mentors and trains assigned staff. Incumbent works independently of the county assessor, identifying concerns through data analyses to help direct department priorities and workflow. Incumbent performs a variety of duties according to a formal schedule with priorities determined by seasonal deadlines and service needs of the public. Errors in incumbent's work are prevented through procedural safeguards and are detected through supervisory review and/or notification from other departments/agencies. Undetected errors may result in loss of money and/or loss of time for correction.

### III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent contact with co-workers, other County departments, title companies, attorneys, buyers, sellers, brokers, bankers, appraisers, county assessors, GIS, and the public for a variety of purposes, including directing and interpretating market date, explaining and interpreting departmental policy and assuring proper accomplishment of duties.

Incumbent reports directly to Chief Deputy and/or Assessor.

### IV. PHYSICAL EFFORT AND WORKING ENVIRONMENT:

Incumbent performs duties in a standard office environment and in the field, involving sitting and walking at will, sitting for long periods, lifting/carrying objects weighing up to 50 pounds, close/far vision, speaking clearly, and hearing sounds/communication. Incumbent may be exposed to potential irate/hostile individuals.

Incumbent occasionally works extended hours and travels out of town for training/conferences, sometimes overnight.

### APPLICANT/EMPLOYEE ACKNOWLEDGEMENT

The job description for the position of Sales Disclosure Supervisor/Deputy for the Monroe County Assessor Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes \_\_\_\_ No \_\_\_\_

Applicant/Employee signature

Date

Type or Print name

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

Type or Print name

Date 9/8/2023



### **COUNTY OF MONROE, INDIANA**

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

Position Title:	Market Data Analysis Administrator/Deputy			
Department:	Assessor			
Employee Na	me: Danial Warner			
FLSA Stat	tus: OExempt	•Non-exempt		

### • Purpose •

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- a department reorganization study
- a measure of how well you perform your duties

### • Instructions •

- 1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
- 2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
- 3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.

4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

#### DO NOT DETACH THIS INSTRUCTION SHEET

# Helpful Hints for Completing the Job Questionnaire

Please be aware that this project does <u>NOT</u> involve performance evaluations of individuals. We aren't collecting information about <u>how</u> you perform, only <u>what</u> you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner*, *Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a "snap shot" of the basic functions of a position – it is <u>not</u> a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands <u>the essential functions and the skills necessary to perform the job</u>.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

• You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, "Maintains statistics on computer for Indiana Department of Environmental Management (IDEM)."

• Also, **explain any terminology that may be unique to your department**, such as report names and form numbers. For example, "*Complete XQ325 forms*" may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, "*Complete payment assistance application forms*."

• Are machines, equipment, or special tools involved in accomplishing tasks? For example, "*Post payments*" could involve a computer or writing in manual ledgers, and "*Update maps*" could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

### **Section I** Essential Functions of Position

### 1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

Analyzes data collected in the real estate market to change property assessments to better reflect market values.

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

# If Duties Section of your existing job description is accurate please note "see existing description' and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

	Essentiality	Frequency
Supervise subordinate personnel	<u>_B</u>	<u></u>
<b>ESSENTIALITY</b>	<b>FREQUENCY</b>	
A= Marginal function of the job B= Essential function of the job	C= Perform annual D= Perform quarte E= Perform month F= Perform weekly G= Perform on regu	rly at a minimum ly at a minimum at a minimum

### List Primary Duties:

1. Investigates market data using buyers, sellers, brokers, bankers, appraisers, county assessors, and others knowledgeable in real estate practices and activities. Analyzes residential sales, searching for trends related to market activity.

2. Utilizes compiled and analyzed residential data to perform sales ratio studies that will affect changes in neighborhood assessments to better reflect market shifts in county property values. \_\_\_\_\_

Essen Freq

B	G

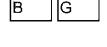
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- 3. Works closely with contracted vendors, investors and business owners to investigates commercial sales and assessments to effectively equalize commercial class groups across the county to better represent market values for proper assessment.
- 4. Supervises staff, plans, delegates, controls work assignments, evaluates performance, maintaining discipline, administers personnel programs and procedures. Mentors and trains the proper handling of sales transfers and the processes that comply with state law.
- 5. Coordinates and processes sales data according to applicable state and county codes, transferring property ownership and interest into the county's permanent records. Oversees the updating of computer records, entering, changing, deleting data and training as necessary.
- 6. Approves sales disclosures submitted through e-filing and hard copies received from title companies, attorneys, and citizens, including verifying inclusion of appropriate information and returning of incomplete forms for resubmission once corrected.
- 7. Investigates Multiple Listing Service (MLS), Geographic Information System (GIS) and Realtor market resources to determine the validity of sales for compliance to state mandated sales ratio standards.
- 8. Collects sales disclosures after they are filed and inserts missing information, including assessed valuations, neighborhood and property codes, and taxing districts. Determines new construction status as required. Verifies sales prices and determines validity.
- 9. Analyzes all data implementing changes to sales disclosure protocols as needed. Prepares and evaluates technical data, ensuring sales disclosure program is complete and meets state requirements.

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- 10. Researches, analyzes, and interprets residential property data, using field data, building permits and blueprints to assess new construction. Uses CAD based assessment software to sketch building outlines and create property information and make necessary updates.
- 11. Completes a monthly reconciliation of all sales to ensure accuracy of data and to look for discrepancies and patterns that could affect county wide assessment, updating and communicating changes as necessary.
- Prepares, analyzes, provides quality control for data files sent monthly and yearly to the 12. Department of Local Government Finance (DLGF), Legislative Services Agency, and other County departments, Researches, corrects, and submits data not deemed compliant by DLGF.
- 13. Conducts research of legal documents to ensure correct platting of property descriptions and property in use. Investigating parcel classifications for compliance with state law. Corrects and communicates to taxpayers and county offices as appropriate.
- 14. Maintains working knowledge of GIS procedures and ability to apply knowledge to a variety of interrelated processes, tasks and operations. Assists with data creation and maintenance of GIS and INCama, correcting errors and communicating issues with county offices and GIS/INCama.

### Section 11

### Job Requirements/Training/Certification

1. Check level of formal education that is required for your position. When specifying college degrees, please identify acceptable fields of study.

High school diploma/GED Associate Degree 🔽 Ba	accalaureate Degree Masters Degree
Other (Please describe):	
Acceptable fields of study: Marketing, finance, business administrat	tion
2. Specialized training, certification, and/or specific exper Public Accountant).	ience <u>required</u> for your position (such as Certified
State of Indiana Level 3 Certified Indiana Assessor/App certification maintenance.	praiser. Yearly continuing education for Level

### В





в Іг
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# 3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

Knowledge of the fundamentals of real property and mass appraisal, the income approach to valuation, the guiding principles of assessment administration, practices of the Uniform Standards of Professional Appraisal Practice (USPAP), math, statistics, and effective communication.

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

International Association of Assessing Officers (IAAO) works, All level 3 textbooks and reference materials, DLGF legal documents, State Law and legislation, real estate and commercial property listing publications, real estate property assessment guidelines.

- 5. Does your position require that you have a valid driver's license? Yes O No If yes, for which duties? Field Inspection, site visits, continued education.
- 6. Does your position require you to be at least 21 years of age? O Yes ONO

### 7. Does your position <u>require</u> passage of a:

Medical exam?	OYes	⊙ No
Drug test?	⊙Yes	O No
Psychological exam?	OYes	• No
Written exam?	O Yes	• No

Other tests: Background Check

### 8. Check and list equipment you operate as a regular part of performing your duties:

Computer	Typewriter	Calculator	Transcriber/dictaphone	Vehicle	
Other (Plea	se describe)				

# 9. Your fundamental job duties may involve some relationship between you and <u>data</u> (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that <u>most accurately</u> describe your involvement with data.

Compare or observe similarities and differences between data, people, or things.
Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing
operating budget, determining charges.
Compile, collate, or classify data.
Analyze, evaluate, observe, diagnose, investigate.
Coordinate, place, make determinations, take action based on data analysis.
Fabricate data to discover facts or develop concepts or interpretations.

10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that <u>most accurately</u> apply to your job responsibilities.

- Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).
- File, post, mail inaterials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).
- Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).

Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

### Section III

### **Difficulty of Work/Responsibility**

- 1. Which of the following phrases <u>best</u> describes the type of supervision you receive?
- **Immediate supervision.** Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- Assignments and objectives set jointly by immediate supervisor and myself. Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- Indirect or occasional supervision. Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- General supervision. Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- Administrative or advisory direction from a board or CEO. Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

# 2. Which of the following phrases <u>best</u> describes the criteria for which your work is reviewed? Work is reviewed <u>primarily</u> for...

Attainment of objectives Appropriate supervision or direction of assigned operations				
Compliance with precedent		Compliance with legal requirements		
Technical accuracy	Compliance with Department policy	Effect on Department goals/objectives		
Soundness of judgment	Other (please describe):			
If you checked more than two,	please provide explanation:			

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# 3. Check one of the following statements that <u>most accurately</u> describes the judgment you use in performing fundamental job duties.

- O Decisions are always determined by specific instructions or existing, well established policies and procedures.
- On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- O Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- O Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

# 4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please explain and provide examples.*

Compiling and analyzing market data to affectively trend neighborhoods to reflect accurate assessments of value. As an example, using a neighborhood or township's quarter or yearly sales to find trends that would then be used to raise or lower property values in that area.

### 5. What programs, persons and/or functions are directly affected by the decisions you make?

Indiana State Sales Ratio Studies, Nexus Group, GIS, Monroe County Property owners, the Recorder, Auditor and Assessor offices, DLGF.

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

Applying analyzed sales to change the values of neighborhoods or for the equalization of commercial interest. The Property Director or County Assessor can overrule my decisions.

### Section IV

### Personal Work Relationship/Supervisory

1. What is the name and position title of your immediate supervisor?

Supervisor: Shelly Jordan Title: Property Director

### 2. Complete A) and B) only if you supervise or direct the work of others:

### A) List names and position titles of employees you supervise or direct as a regular part of your duties.

Madison Miller - Sales Disclosure Specialist

### B) Check which statements most accurately describe your managerial/supervisory responsibilities.

- Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.
- Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.
- Interview candidates for openings and make hiring recommendations.
- ☐ Make hiring decisions.
- ✓ Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.
- Plan, delegate and control work assignments and special projects to assigned staff.
- Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.
- Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.
- Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.
- Evaluate the performance results of assigned staff. Discuss present and past performance with each person. Keep supervisor informed of performance discussion results.
- Review salaries of assigned staff and recommend changes when warranted.
- Recommend personnel actions, such as promotions, transfers, demotions.
- Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.
- Maintain discipline and recommend corrective action as warranted.
- Communicate and administer personnel programs and procedures for my area in accordance with approved policies.

### 3. List other departments, agencies, organizations, and others with whom you regularly communicate.

Auditor, Recorder, IAAO, DLGF, Nexus Group, GIS, Title Company, Attorneys

# 4. Check which statements <u>most accurately</u> describe your contact with employees, customers, governmental officials, or the general public.

- Cooperative Work Relationship: Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.
- **Render Service:** Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.
- **Instruct:** Teach or present subject matter to others through explanation, demonstration and supervised practice.
- Negotiate: Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.

Mentor: Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

	Section N					
<u>Ph</u>	ysical Effort/Wo	ork Environment				
	_	ing best describes your prim				
	□ Laboratory					
	Garage/shop Manufacturing setting Other (please describe):					
Ifa	ou chacked more the	n one, please provide addition	lexplanation			
lj y		in one, pieuse provide daditioni	и ехрипацоп			
2. V	Which of the follow ESSENTIA	ing best describes your <u>prim</u> LITV	<u>ary</u> working	conditions?		
		Applicable to job				
		al requirement of job				
	B= Essentia	al requirement of job				
		····	· · · · · ·			
Ess	sentiality		Essentia	llity		
В	work alone with	ninimum supervision	В	work with others in a team environment		
В	work under time	pressure	В	work rapidly for long periods		
В	work on several t	asks at the same time	В	understand and carry out oral instructions		
В	read/carry out sin	nple written instructions	В	memorize and retain instructions		
В	apply knowledge	of people, locations	В	present findings in oral or written form		
В	] plan and layout a	ssigned work projects	А	testify in legal proceedings/court		
В	compute/calculat	e, such as interest				
В	count, make simp	count, make simple arithmetic additions/subtractions				
В	read/interpret det	read/interpret detailed prints, sketches, layouts, specifications, maps				
В	prepare detailed	prepare detailed reports, such as financial statements, sales activity, product feasibility				
A	A plan and present public speaking presentations, fund raisers, special events					
В	sitting & walking	at will	В	sitting for long periods		
В		for long periods	A	walking on uneven terrain		

N/A	work in extreme hot or co	ld temperatures	N/A work in wet/	icy surroundings		
N/A	respond to emergencies fr	on off-duty status	N/A work with o	near chemicals (please list)		
N/A	work near fumes, odors, d	ust, dirt (please describe)	There are often irate taxpayers demanding explanations about assessments, especially during tax			
N/A	work in a noisy environme	ent (describe noise source)				
N/A	work in confined areas (please describe)		season.			
N/A	wear protective clothing o	r equipment (please describ				
N/A	work in high places, such	as ladders, roofs, bucket tru	k (please describe)			
Α	work with or exposed to v	iolent/irate individuals (plea	e describe)			
N/A	respond to situations invo	lving potential physical harr	to self and others (ple	ase describe)		
В	lifting under 25 pounds	B lifting 25 to 50 po	nds A liftin	ng over 50 pounds		
В	pushing/pulling objects	B carrying objects	B crou	ching/kneeling		
В	bending at waist	B reaching	A driv	ing		
В	close vision	A far vision	B colo	r perception		
В	depth perception	B speaking clearly	B hear	ing sounds/communication		
В	handling/grasping objects	B fingering objects (	icking, pinching)			
3.1	ist the three most physical	ly demanding activities yo	<u>regularly</u> perform in	ı your job.		
S	tanding and sitting for long period	S				
Li	fting heavy boxes					
				. : ·		
4. List the three most emotionally demanding activities you <u>regularly</u> perform in your job.						
D	Dealing with hostile taxpayers in office and on the phone					
Ľ			· · · ·	······································		
Γ			······································			
5. V	What is your normal work s	schedule (example, 8 a.m. 4	p.m. M-F)?			
8	8 A.M 4 P.M., M-F					

6. Are you required to:	Never	<u>Regularly</u>	<u>Occasionally</u>
a. work extended hours	0	0	۲
b. work weekends	0	0	۲

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	Never	Regularly	<b>Occasionally</b>
c. work evenings	0	0	۲
d. travel out of town, but not overnight For what purpose?	0	0	۲
Continued Education			
c. travel out of town overnight For what purpose?	0	0	۲
Continued Education	1		
f. respond to emergencies on 24-hr basis	۲	0	0
g. on call on rotation basis	۲	0	0

7. Provide any other examples/information which would be helpful in understanding the physical and= mental requirements of your job.

8. Is your position politically appointed by a recognized Department Head or Elected Official according to= IC 36-2-16-4? Yes O No O

### Section VI

### **Certifications**

Employee: I certify that the above statements are an accurate and fair description of my position.

Name (print or type) Danial Warner	Hire date	3/18/2019
Title Market Data Analysis Administrator/Deputy	Department	Assessor
Signature	Date	
<i>Supervisor:</i> I have reviewed the contents of this que or modifications I made have been initialed by me		동안에 있는 것 같은 것 특히 가지는 것은 이렇게 있는 것 같은 것은 것은 것 같은 것 같이 있는 것 같이 있는 것 같이 있다. 가지 않는 것 같은 것 같은 것 같은 것 같은 것 같은 것 같은 것 같
Is the position described above, politically appoint according to IC 36-2-16-4? Yes O No O	ted by a recognized	Department Head or Elected Official
Signature Juett My	Date	9-15-23
Please refer any major concerns or questions regar	ding this questionn	aire to

Waggoner, Irwin, Scheele & Associates, Inc. 118 South Franklin Street Muncie, IN 47305 Phone: (765) 286-5195 Fax: (765) 286-2824

### POSITION DESCRIPTION COUNTY OF MONROE, INDIANA

POSITION:	Administrative Assistant to the PTABOA/Deputy-Level 2 Assistant Administrator to the PTABOA/Deputy-Level 2
<b>DEPARTMENT:</b>	Assessor
WORK SCHEDULE:	<del>8:00 a.m 4:00 p.m., M-F</del>
	As Assigned
<b>JOB CATEGORY:</b>	<b>COMOT (Computer, Office Machine Operation, Technician)</b>
	PAT B (Professional, Administrative, Technological)

DATE WRITTEN: September 1995
DATE REVISED: May 2015, February 2021

STATUS: Full-time FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Administrative Assistant to the PTABOA/Deputy-Level 2 for the Monroe County-Assessor's Office, responsible for coordinating the property tax assessment appeal process for realproperty valuation of residential, commercial, new construction, industrial and agricultural andassisting the public.

Incumbent serves as Assistant Administrator to the PTABOA/Deputy-Level 2 for the Monroe County Assessor's Office under direction and independently of the Assessor. Responsible for coordinating all real and personal property appeals, including tax exempt and homestead deduction. Responsible for property valuation on residential, commercial, new construction, industrial, and agricultural. Provides guidance with business personal property, manufactured homes, classified forest and sales disclosures.

### **DUTIES:**

Adhering to State law, incumbent performs informal hearings with taxpayers, which includes verifying accuracy of data, conducting market analysis, reading and interpreting USPAP compliant Appraisals with the goal of resolution.

Coordinates Property Tax Assessment Board of Appeals (PTABOA) functions, including receiving property tax appeals, maintaining accurate records and files, scheduling <del>places and times of</del> hearings, tracking progress of appeals to <del>ensure adherence to state law for time limits of hearings and decisions</del> and obtaining information necessary to defend assessments, such as neighborhood delineation maps, letters, and related information regarding tax bills.

Reviews Analyzes appeal petitions to determine accuracy and accordance with state law and administrative requirements. Returns defective appeal petitions to taxpayer or taxpayer representatives with appropriate evaluation. Monitors deadlines for resubmitting petitions and sends notices of dismissal as appropriate. Attends various meetings and attends training sessions as required or needed.

Educates and aids taxpayers in understanding property assessments, including reviewing property card, answering questions, explaining information, resolving complaints to aide in understanding of data.

Extensive research of current and sold properties for the completion of accurate assessment data and Indiana State compliancy. Including on site evaluations and analyzing data based on market value trends.

Notifies parties of PTABOA hearings, including taxpayers, taxpayer representatives, attorneys, and witnesses. Mails notices, ensuring appropriate addresses.

Processes applications for non-taxable exemptions, including reviewing, investigating, and determining validity. Applies cost tables to arrive at assessed value of residences and mails notifications annually as required.

Ability to work with hostile/irate individuals in a professional manner. Often diffusing stressful situations in order to achieve resolution.

Accompanies Assessor with taxpayers in the office and at neighborhood association meetings after office hours.

Serves as liaison with Nexus field consultants assessing new construction damaged by weather or fire and assists with assessments.

Performs immediate on-site evaluations of damaged properties due to natural disasters and potentially unsafe conditions (i.e., flooding, storms, tornados, fire, and clandestine labs). Including obtaining insurance documentation, evaluating amount of damage to property, correcting assessments accordingly and maintaining accurate records of properties that need reassessed once damage is remediated.

Performs field meetings with taxpayers and reviews sales over 5% with county Assessor.

Maintains communication with the DLGF, IBTR, and Tax Court. Educates staff on various ongoing State, Tax Court and Legislative changes, and House and Senate bills and proceedings.

Updates state approved forms for use in valuation, appeals, and fee collections.

Updates and maintains recorded property values and adds potential property value changes in INcama and generates paperwork.

Provides aid in creating new construction assessments and reassessment of multiple taxing units. Including creating sketches of new construction homes and verifying data from field reviews. Working closely with multiple departments within the county to ensure proper data. Possessing the ability to work in multiple tax years consecutively.

Utilizing the GIS, conducts Agricultural land analysis, including researching USDA Soil ID Overlay reports. Assists taxpayers in filing Classified Forest and Personal Property Farm Forms. Process assessment photos, verifying parcels have accurate data and communicate with software vendors to properly upload images to INCAMA and GIS. Verify data has been uploaded to INCAMA and GIS systems.

Communicates with contracted vendors to verify reassessment data is accurate.

Aids in the rental analysis process to develop a gross rent multiplier annually based on extensive research of rental information in the entire county as well as university properties.

Provides the Auditor's office in identifying properties within the TIF district that are under appeal. Assisting in providing reports that show possible property taxation loss to the county.

Manages integration of tax systems data into assessment system. Acts as quality control for address changes.

Aids the Administrator to the PTABOA with submission of annual appeal reports to the State.

Provides Quality Control and Assistance for the data submission to the State and Auditor's office.

Exchanges information frequently with other County departments.

Answers telephone, determines nature of call, answers questions or directs to appropriate individual or agency. Assists citizens at the counter by answering questions, making copies of documents or directing to appropriate individual or office. Educates and resolves taxation questions and concerns for taxpayers.

Performs duties of other office staff as required. Assists other department personnel in entering residential and commercial data on computer and making corrections to property sketches.

In absence of Assessor, or as needed, acts as hearing officer and perform site visits.

Mentors new county officials/employees on proper appeals procedures.

Communicates with attorneys, tax representatives, appraisers, rental companies, title companies, judges, state and county officials, while maintaining a level of professionalism.

Performs related duties as assigned.

### I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma or GED. Associates degree and/or related previous experience preferred.

Possession of and ability to maintain possession of Level 2 or Level 3 Assessor/Appraiser certification. Maintain current knowledge of real estate market by reading related publications. Participates in continued education required by State Law to maintain job certifications throughout the year.

Working knowledge of state of Indiana property tax code, appeals process, and assessing principles according to the IAAO (International Association of Assessing Officials) and techniques and ability to apply such knowledge to a variety of interrelated process and tasks.

Working knowledge of GIS computer procedures and ability to apply such knowledge to a variety of interrelated processes, tasks, and operations.

Working knowledge of County land areas and applicable state and local codes and terminology.

Working knowledge of State and County Laws regarding real estate, deduction, and associated legal procedures concerning local property and personal taxation, with ability to apply procedures and requirements to specific tasks.

Working knowledge of English grammar, spelling, and punctuation, and ability to use standard office equipment, including but not limited to computer, keyboard, copier, fax machine, telephone, and calculator, FTR recording software and zoom.

Comprehensive knowledge of software used in the Assessor, Auditor, Building, Planning, Recorder and Treasurer's Offices.

Ability to effectively communicate orally and in writing with co-workers, other County departments, attorneys, taxpayer representatives, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to perform the statutory duties as prescribed for the County Assessor's Office as authorized by the Assessor.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to work alone with minimum supervision and with others in a team environment, often with frequent distractions and interruptions, and under pressure from formal schedules, deadlines, and high volume operations.

Ability to work on several tasks at the same time and work rapidly for long periods, often under time pressure, and sometimes at a moments notice with little time for completion.

Ability to occasionally testify in legal proceedings/court as required.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally work extended hours and travel out of town for training/conferences, sometimes overnight.

Possession of a valid Indiana driver's license and demonstrated safe driving record.

### II. <u>RESPONSIBILITY</u>:

Incumbent performs duties according to a flexible, customary routine with priorities determined byseasonal deadlines and service needs of the public. Incumbent has full discretion and authorityallowed under the County Assessor's policies, procedures, and practices in making assessmentvaluation decisions. Errors in incumbent's work are prevented through legally defined procedures and detected by supervisory review and/or notification from other departments and/or agencies. Undetected errors may result in loss of money and/or loss of time for correction.

Incumbent has full authority and discretion allowed under the County Assessor's policies, procedures, and practices in making assessment valuation decisions during formal, informal, and field review meetings. Incumbent works independently of the Assessor and has full authority to act in place of the assessor during such meetings.

### III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent contact with other co-workers, other County departments, attorneys, taxpayer representatives, and the public for a variety of purposes, including receiving daily assignments, explaining and interpreting departmental procedures and assuring proper accomplishment of duties.

Incumbent reports directly to Assessor.

### IV. PHYSICAL EFFORT AND WORKING ENVIRONMENT:

Incumbent performs duties in a standard office environment, in a vehicle, and in the field, involving sitting/walking at will, sitting for long periods, lifting/carrying objects weighing up to 50 pounds, close/far vision, speaking clearly, hearing sounds/communication, and driving. Incumbent is exposed to normal hazards associated with driving a vehicle and working in the field, including exposure to inclement weather. Incumbent may be exposed to potentially irate/hostile individuals, and unsafe environments (i.e., Flooding, storms, tornados, fire, clandestine labs).

Incumbent occasionally works extended hours and travels out of town for the purpose of training/conferences, occasionally overnight.

### **APPLICANT/EMPLOYEE ACKNOWLEDGEMENT**

The job description for the position of Administrative Assistant to the PTABOA/Deputy-Level 2 for the Monroe County Assessor Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes <u>No</u>

Applicant/Employee signature

Date

Type or Print name

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

Type or Print name

Date 9/12/2023

# **Employee Job Questionnaire**

### COUNTY OF MONROE, INDIANA

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

Position Title:	Assistant Administrator to the PTABOA/Level 2				
Department:	Assessor				· · · · · · · · · · · · · · · · · · ·
Employee Na	me: Jenn	fer Hawkins			· · · ·
FLSA Stat	tus: Ol	Exempt	Non-exempt		

#### • Purpose •

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- · a department reorganization study
- a measure of how well you perform your duties

### • Instructions •

- 1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
- 2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
- 3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.

4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

#### DO NOT DETACH THIS INSTRUCTION SHEET

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# Helpful Hints for

### **Completing the Job Questionnaire**

Please be aware that this project does  $\underline{NOT}$  involve performance evaluations of individuals. We aren't collecting information about <u>how</u> you perform, only <u>what</u> you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner*, *Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a "snap shot" of the basic functions of a position – it is <u>not</u> a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands <u>the essential functions and the skills necessary to perform the job</u>.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

• You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, "Maintains statistics on computer for Indiana Department of Environmental Management (IDEM)."

• Also, explain any terminology that may be unique to your department, such as report names and form numbers. For example, "*Complete XQ325 forms*" may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, "*Complete payment assistance application forms*."

• Are machines, equipment, or special tools involved in accomplishing tasks? For example, "*Post payments*" could involve a computer or writing in manual ledgers, and "*Update maps*" could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

# Section I Essential Functions of Position

#### 1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

Responsible for coordinating informal and formal appeals, as well as responsible for property valuation on all real estate parcels.

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

# If Duties Section of your existing job description is accurate please note "see existing description' and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

	Essentiality	Frequency	
Supervise subordinate personnel	<u>_B</u>	G	
<b>ESSENTIALITY</b>	<b>FREQUENCY</b>		
A= Marginal function of the jobC= Perform annually at a minimumB= Essential function of the jobD= Perform quarterly at a minimumE= Perform monthly at a minimumF= Perform weekly at a minimumG= Perform on regular (daily) basis			
ist Primary Duties:			Essen Freq
Performs informal hearings with taxpa process, verifying accuracy of data, c			B G

 Coordinates the Property Tax Assessment Board of Appeals functions, including accepting appeals, scheduling appeal hearings, tracking appeal process and maintaining accurate database.

lG B

- 3. Researches and analyzes information necessary to defend assessments, such as neighborhood delineation maps, market data, letters, and related information regarding assessments.
- 4. Analyzes appeal petitions to determine accuracy in accordance with state law and administrative requirements. Returns defective appeal petitions to taxpayer or taxpayer representatives with appropriate evaluation. Monitors deadlines for resubmitting petitions.
- 5. Educates and aids taxpayers in understanding property assessments, including reviewing property card, answering guestions, explaining information, resolving complaints to aide in understanding of data.
- 6. Analyzes and interprets residential property data, using field work, building permits, and blueprints to develop assessments for new construction. Uses CAD based software to sketch building outlines, create property information and make necessary updates to property.
- 7. Performs reassessment of parcels in multiple taxing units. Working closely with multiple departments within the county to ensure proper data. Possessing the ability to work in multiple taxing years consecutively.
- 8. Extensive research of current and sold properties for the completion of accurate assessment data and Indiana State compliancy. Including on site evaluations and analyzing data based on market value trends.
- 9. Oversees all assessment photos and address changes, verifies accurate data, ensures images are properly uploaded into INCAMA and GIS systems, and maintaining communication with software vendors and other departments.

- В G
  - В G

- G В
- G
- B G
- G

G В





- 10. Conducts Agricultural land analysis using the GIS, and researching USDA soil ID overlay reports. Provides knowledge to taxpayers on filing Classified Forest and Personal Property Farm Forms.
- 11. Manages taxpayers concerns by verifying data accuracy through on site inspections, with and in place of the assessor. Responsible for mapping route, scheduling appointments, measuring and collecting data, making corrections and maintaining accurate database.
- 12. Performs immediate on-site inspection of damaged properties due to natural disasters and unsafe conditions (i.e.,flooding, storms, tornados, fire, former clandestine labs). Including obtaining documentation, evaluating amount of damage to property, and correcting assessed values.
- 13. Assists in the rental analysis process to develop a gross rent multiplier annually based on extensive research of rental information in the entire county as well as university properties.
- <sup>14.</sup> Provides Quality Control and Assistance for the data submission to the State and Auditor's office.

# Section II

#### Job Requirements/Training/Certification

1. Check level of formal education that is <u>required</u> for your position. When specifying college degrees, please identify acceptable fields of study.

High school diploma/GED	Associate Degree	Baccalaureate Degree	Masters Degree	
Other (Please describe):				
Acceptable fields of study:Marke	ting, Finance, Business A	dministration		
2. Specialized training, certific Public Accountant).	ation, and/or specific	experience <u>required</u> for <u>required</u>	your position (such as Cer	rtified
State of Indiana Level 1 & 2 Yearly continuing education				

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G

IB.





|--|

R	

3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

Knowledge of the fundamentals of real property mass appraising, Income Approach to Value, Analytical Skills, Practices of the Uniform Standard of Professional Appraisal Practice (USPAP), math, statistics, communication, public speaking, problem solving, and ethics.

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

Real Property Assessment Guidelines, Indiana State Law and legislation, real estate property listing publications, all Level 1 & 2 textbooks and reference materials, DLGF legal documents and memos.

5. Does your position require that you have a valid driver's license? • Yes O No If yes, for which duties?

Continued education, On-Site Inspections

6. Does your position require you to be at least 21 years of age? O Yes O No

#### 7. Does your position <u>require</u> passage of a:

Medical exam?	OYes	ΟNο
Drug test?	€Yes	O No
Psychological exam?	OYes	• No
Written exam?	• Yes	ONo

Other tests: Level 1 and Level 2 Certification within 2 years of hire

#### 8. Check and list equipment you operate as a regular part of performing your duties:

Computer	Typewriter	Calculator	Transcriber/dictaphone	✓ Vehicle
Other (Pleas	Other (Please describe) For The Record (FTR) Equipment, Scanner, Owl Zoom Camera			

9. Your fundamental job duties may involve some relationship between you and <u>data</u> (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that <u>most accurately</u> describe your involvement with data.

Compare or observe similarities and differences between data, people, or things.

- Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing operating budget, determining charges.
- Compile, collate, or classify data.
- Analyze, evaluate, observe, diagnose, investigate.
- Coordinate, place, make determinations, take action based on data analysis.
- Fabricate data to discover facts or develop concepts or interpretations.

10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that <u>most accurately</u> apply to your job responsibilities.

- Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).
- File, post, mail materials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).
- Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).
- Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

# Section III

## **Difficulty of Work/Responsibility**

- 1. Which of the following phrases best describes the type of supervision you receive?
- O Immediate supervision. Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- Assignments and objectives set jointly by immediate supervisor and myself. Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- Indirect or occasional supervision. Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- General supervision. Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- Administrative or advisory direction from a board or CEO. Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

# 2. Which of the following phrases <u>best</u> describes the criteria for which your work is reviewed? Work is reviewed <u>primarily</u> for...

Attainment of objectives	Appropriate supervision or direction of	
Compliance with precedent	Adherence to instructions/guidelines	Compliance with legal requirements
Technical accuracy	Compliance with Department policy	Effect on Department goals/objectives
Soundness of judgment	Other (please describe):	
	1 11 11	

If you checked more than two, please provide explanation:

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# 3. Check one of the following statements that <u>most accurately</u> describes the judgment you use in performing fundamental job duties.

- O Decisions are always determined by specific instructions or existing, well established policies and procedures.
- On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- O Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- O Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- O Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please* explain and provide examples.

Analyzing market data to ensure accurate assessed property valuations. As an example, applying a variety of resources to determine if an assessment should be raised or lowered.

5. What programs, persons and/or functions are directly affected by the decisions you make?

Monroe County taxpayers, Auditor, Treasurer, InCama, GIS, PTABOA, Coworkers

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

Using market analysis research to change the assessed value of properties. The Monroe County Assessor and the Administrator to the PTABOA can overrule my decisions.

## Section IV

Personal Work Relationship/Supervisory

1. What is the name and position title of your immediate supervisor?

Supervisor; Neely Druin

Title: Administrator to the PTABOA

2. Complete A) and B) only if you supervise or direct the work of others:

#### A) List names and position titles of employees you supervise or direct as a regular part of your duties.

B) (	Check which statements most accurately describe your managerial/supervisory responsibilities.
	Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.
	Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.
$\checkmark$	Interview candidates for openings and make hiring recommendations.
	Make hiring decisions.
Ø	Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.
	Plan, delegate and control work assignments and special projects to assigned staff.
	Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.
	Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.
	Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.
	Evaluate the performance results of assigned staff. Discuss present and past performance with each person. Keep supervisor informed of performance discussion results.
	Review salaries of assigned staff and recommend changes when warranted.
	Recommend personnel actions, such as promotions, transfers, demotions.
	Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.
	Maintain discipline and recommend corrective action as warranted.
	Communicate and administer personnel programs and procedures for my area in accordance with approved policies.
3. I	ist other departments, agencies, organizations, and others with whom you regularly communicate.
	Auditor, Treasurer, Planning, Building, Legal, GIS, Attorneys Department of Local Government Finance, Indiana Board of Tax Review, Indiana Tax Court
	Check which statements <u>most accurately</u> describe your contact with employees, customers, governmental cials, or the general public.
$\checkmark$	<b>Cooperative Work Relationship:</b> Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.
$\checkmark$	<b>Render Service:</b> Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.
$\checkmark$	<b>Instruct:</b> Teach or present subject matter to others through explanation, demonstration and supervised practice.
	<b>Negotiate:</b> Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.

Mentor: Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

## Section V

#### **Physical Effort/Work Environment**

1. Which of the following best describes your primary working environment?

Laboratory

- Standard office
- Garage/shop
- ☐ Manufacturing setting
- Storeroom Vehicle

Essentiality

✓ Outdoors

Other (please describe):

If you checked more than one, please provide additional explanation.

**Routine On-Site Inspections** 

2. Which of the following best describes your primary working conditions? ESSENTIALITY

> N/A = Not Applicable to jobA= Marginal requirement of job **B**= Essential requirement of job

#### **Essentiality**

В

В

B	work alone with minimum supervision	В	work with others in a team environment		
В	work under time pressure	В	work rapidly for long periods		
В	work on several tasks at the same time	В	understand and carry out oral instructions		
В	read/carry out simple written instructions	В	memorize and retain instructions		
В	apply knowledge of people, locations	В	present findings in oral or written form		
В	plan and layout assigned work projects	В	testify in legal proceedings/court		
В	compute/calculate, such as interest				
В	count, make simple arithmetic additions/subtractions				
В	read/interpret detailed prints, sketches, layouts, specifications, maps				
В	prepare detailed reports, such as financial statements, sales activity, product feasibility				
A	plan and present public speaking presentations, fund raisers, special events				

sitting for long periods В sitting & walking at will В walking on uneven terrain standing/walking for long periods

В	work in extreme hot or co	ld temperatures	В	work in wet/icy surroundings
N/A	respond to emergencies fr	om off-duty status	В	work with or near chemicals (please list)
В	work near fumes, odors, d	ust, dirt (please describe)		xposure, Crawlspaces,
N/A	work in a noisy environme	ent (describe noise source)	Angry <sup>-</sup>	ents (Fumes, Odors, Dust, Dirt) Faxpayers (violent/irate
N/A	work in confined areas (pl	lease describe)		er Inspections (Physical Harm)
N/A	wear protective clothing o	r equipment (please descri		Clandestine Lab Reassessment
N/A	work in high places, such	as ladders, roofs, bucket tr	uck (please	describe)
В	work with or exposed to v	iolent/irate individuals (pl	ease describe	e)
A	respond to situations invol	lving potential physical ha	rm to self an	d others (please describe)
В	lifting under 25 pounds	B lifting 25 to 50 p	ounds	B lifting over 50 pounds
В	pushing/pulling objects	B carrying objects	E	3 crouching/kneeling
В	bending at waist	B reaching	E	3 driving
В	close vision	B far vision	E	B color perception
В	depth perception	B speaking clearly	E	B hearing sounds/communication
В	handling/grasping objects	B fingering objects	(picking, pi	nching)
	st the three most physical	ly demandiug activities y	ou <u>regularly</u>	y perform in your job.
On	site inspections			
Eye	e strain due to extended comput	er use		
Sta	nding or sitting for long periods	<u> </u>		
4 T 5	st the three most emotion:	ally domanding potivition	you rogula	ely norform in your job
	· · · · · · · · · · · · · · · · · · ·		you <u>regula</u>	<u>riv</u> perform in your job.
L	eraction with hostile/irate taxpaye			
	orming taxpayers based on mark		ment is warrar	
L	site disaster inspections	· · · · · · · · · · · · · · · · · · ·		
	hat is your uormal work s	schedule (example, 8 a.m	. 4 p.m. M-ł	/)?
8 a	am - 4 pm M-F			
	re you required to: Fork extended hours	<u>Never</u> O	<u>Regula</u> O	rly <u>Occasionally</u>

b. work weekends

	Never	<b>Regularly</b>	Occasionally
c. work evenings	0	0	۲
d. travel out of town, but not overnight For what purpose?	0	0	۲
Continuing Education			
c. travel out of town overnight For what purpose?	0	0	۲
Continuing Education			
f. respond to emergencies on 24-hr basis	۲	0	0
g. on call on rotation basis	۲	0	0

7. Provide any other examples/information which would be helpful in understanding the physical and = mental requirements of your job.

Frequently work with emotionally charged individuals on site, in office and by phone concerning property tax valuation increases.

8. Is your position politically appointed by a recognized Department Head or Elected Official according to= IC 36-2-16-4? Yes O No •

# Section VI

#### Certifications

Employee: I certify that the above statements are an accurate and fair description of my position.

Name (print or type) Jennifer Hawkins	Hire date 01/29/2002
Title Administrative Assistant to the PTABOA/Deputy II	Department Assessor
Signature	Date 9/12/2023

*Supervisor:* I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes  $\bigcirc$  No  $\bigcirc$ 

~	() IIA		()) · · · · · · · · · · · · · · · · · ·	
Signature	Cottak	Date	4-15-23	
			1 1	

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc. 118 South Franklin Street Muncie, IN 47305 Phone: (765) 286-5195 Fax: (765) 286-2824

#### POSITION DESCRIPTION COUNTY OF MONROE, INDIANA

POSITION:	GIS Assessment Specialist/Deputy	
<b>DEPARTMENT:</b>	Assessor	
WORK SCHEDULE:	<del>8:00 a.m. – 4:00 p.m., M-F</del>	
JOB CATEGORY:	<b>COMOT (Computer, Office Machine Operation, Technicia</b>	<del>an)</del>
	PAT D (Professional, Administrative, Technological)	ŕ
DATE WRITTEN: Septer	ber 1991 STATUS: Full-time	

DATE REVISED: May 2015, February 2021, September 2023 FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as GIS Assessment Specialist/Deputy for the Monroe County Assessor's Office, responsible for coordinating the use of Geographical Information System (GIS) for assessment purposes, transferring of real estate property, processing splits and transfers, calculating land valuation assessments including home sites, tillable land, agricultural, classified forestry, woodland, and other farmland. agricultural land. Trains, educates, and provides technological guidance within Assessor's office.

#### I. DUTIES:

Performs various GIS duties, including producing printed maps, providing GIS products and information for reports and presentation, creating, maintaining, and updating databases, operating computer software to update maps, and providing technical and administrative assistance for the County.

Coordinates Geographic Information Systems (GIS) usage for department, including using ortho maps and land use tables and operating GIS digital mapping computer, including digitizing ownership, mapping numbers, soil identification, and proper use and locations.

Maintains current knowledge of GIS by reading related publications and attending seminars, conferences, and/or meetings.

Coordinates closely with GIS venders to engineer new maps and resources to facilitate the assessor's office.

Manages integration of tax system data into assessment system. Acts as quality control for transfer, legal description, and plat data.

Maintains and updates property records with land splits, combinations, surveys, plats, annexations and transfers, new and additional assessments, and changes for all townships in County, including entering information into computer, maps and plats, printing new property cards, filing, and sending copies to appropriate individuals. Digital and hardcopy files. Generates property assessment records for newly platted subdivisions and parcels.

Generates new property subdivisions in the assessment system using historical plats and deed records, aerial photos, and survey documents to accomplish tasks.

Assists in the creation of new neighborhood groupings, land values and related factors based on extensive market research on newly platted developments, or stratified existing subdivisions.

Processes and enters on computer all requests and changes in the Classified Forest taxing system. Receives applications for classified forest. Using Geo Mapping, traverses classified survey to identify USDA soil types, land use types, and eligibility of land being assigned Classified Forestry by the State of Indiana Department of Natural Resources, as well as remaining non-classified forest land. Maintains contact with DNR forester on new applications, and violations of classified forest requirements.

Calculates solar energy tax deductions, Assesses back taxes and penalties for withdrawals from Classified Forestry program, and maintains land file. by determining USDA soil type, till ability, wooded coverage of withdrawn area, and calculating an average per acre agricultural rate, and the applying tax and interest rates. Distributes calculation to Auditor's office.

Exchanges information frequently with other County departments.

Researches Conducts research of legal documents to ensure correct platting of property descriptions, and property in use. Including deeds, surveys, resolutions, court orders, declarations, plats, covenants and restrictions, mortgages, leases and contracts.

Continually manages legal description, ownership, and location address changes, such as name or deedstransfers, plats and surveys, and planning address reports and updates property cards. Updates property record cards by making proper entries in Assessor's land records, generates and updates CAD based sketches of improvements and structures within assessment software, transfer data, and internal plat maps. Identifies and matches parcels in DLGF mandates mandated compliance reports of Auditor and Assessor systems.

Reconciles conflicting survey information and data with appropriate boundary geometries and mapping components, and edits assessment system to reflect changing information in GIS.

Answers combination and un-combination requests from taxpayers by identifying if parcels can be combined based on legal description, location, and deeded name. Moves improvements and valuations as determined by updated active parcel(s).

Reviews and processes Solar, GEO-thermal and homestead-eredit deduction applications, determining validity of exemptions. Assigns and calculates tax caps for land and structures for tax purposes.-and providing provides Auditor with appropriate deductible assessment values as appropriate-annually.

#### Provides assessment value information to the Auditor's office annually.

Prepares reports monthly check and balances to maintain accurate records and discover potential improvements to procedures, quality control, time management, and accuracy.

Generates comprehensive data reports by request from various county, city, state and private individuals for a variety of assessment related topics accurately, timely, and professionally.

Attends various meetings, conferences, and training sessions as required to maintain State required

professional certifications or as needed.

Follows State legislative & Administrative code changes, as well as active Indiana Senate and House Bills and current tax court cases affecting property assessments, deductions, and taxes.

Interacts with County Attorney, assuring codified laws are upheld.

Authors documentation and trains new and existing staff for best practices, Standard operating procedures, training manuals for all office procedures. Procures and provides educational resources for staff to advance the skills of the office. Updates documentation as continually changing legislation alters procedures to keep training materials relevant. Shares all written documentation and training with other assessment officials in the state of Indiana.

Composes and instructs State of Indiana approved Continuing Education classes, when requested.

Mentors other officials from other governmental departments within and outside of Monroe County Government.

Compiles raw data from new construction sites, applying rules from State Guidelines, makingcalculations, and generating assessment values. Enters values into computer and Prepares and notice of assessment to taxpayers as required. Researches, analyzes, and interprets residential property data, using field data, building permits and blueprints to develop assessments for new construction. Uses CAD based assessment software to sketch building outlines and create property information and make necessary updates to property record cards. Notifies taxpayers of assessment changes as required. Prepares and submits various related reports as required or requested.

Investigates market and sales data with buyers, sellers, real estate brokers, property developers, bankers, appraisers, other County Assessors and additional professionals knowledgeable in real estate practices and activities.

Analyzes and calculates Ratio Study on residential sales data, determining and applying neighborhood and market factors, and calculating accurate real estate market values in delineated market areas.

Answers telephone, determines nature of call, answers questions or directs to appropriate individual or agency. Assists citizens at the counter by answering questions, making copies of documents or directing to appropriate individual or office. Represents the Assessor and GIS office in a customer service role by answering telephones/greeting customers in a welcoming and friendly manner, responding to inquiries, and directing callers/visitors to appropriate individual or department.

Educates and aides taxpayers in understanding property assessments, including reviewing property card, answering questions, explaining information, resolving complaints and diffusing irate individuals to aide in their understanding. Communicates with taxpayers using various methods such as mail, email, chat, text, zoom, telephone, and in person.

#### Performs duties of other office staff as required.

Coordinates all business and Economic Development deductions, tax abatements and Enterprise Zone Investment deductions, including administering these programs collaboratively with County Council, City of Bloomington, and Bloomington Urban Enterprise. Interprets abatement resolutions from the governing bodies of Monroe County, The City of Bloomington and the Town of Ellettsville. Corresponds closely with the Economic Revitalization representatives of the governing bodies, other county departments, tax representatives, taxpayers and attorneys, educating them on procedures, guidelines, required State forms, and State mandated deadlines, to properly track the abatement. Determines value of property prior to proposed construction or remodel of abated properties to set a base rate. Receives, analyses, and stores all documentation related to abatement. Assesses new construction of abated property and calculates the difference to determine Abatable values which are then delivered to the Economic Revitalization Coordinator in the Auditor's office. Verifies abatement percentage applied by the auditor's office for accuracy.

Adhering to state law, incumbent performs informal hearings with taxpayers which includes verifying accuracy of data, conducting market analysis, reading and interpreting USPAP Compliant Appraisals with the goal of resolution.

Advises and provides quality control for Business tangible personal property and annually assessed mobile homes data that is submitted to the Auditor, Department of Local Government Finance, Legislative Services Agency,

Performs related duties as assigned.

#### **II. JOB REQUIREMENTS AND DIFFICULTY OF WORK:**

High school diploma or GED. Associates degree and/or related previous experience preferred.

Possession of and ability to maintain possession of Level 2 and Level 3 Assessor/Appraiser certification.

Working Extensive knowledge of Indiana State property tax code, assessing principles as determined by the International Association of Assessing Officials, and techniques and ability to apply such knowledge to a variety of interrelated processes and tasks.

Knowledge of departmental functions and office procedures and ability to properly maintain official department records and documents.

Working knowledge of County land areas and applicable state and local codes and terminology, with ability to accurately read, interpret, and use land documents.

Thorough knowledge of legal procedures concerning local property and personal taxation, with ability to apply procedures and requirements to specific tasks.

Ability to maintain current knowledge of applicable statutes and guidelines and adapt to changes in procedures accordingly.

Thorough knowledge of drafting, geometry, trigonometry, and related practices, procedures, and equipment, with ability to accurately review and process property records, identify and resolve discrepancies, and prepare maps and drawings accordingly.

Thorough knowledge of Department computer systems and related programs, with ability to effectively

enter and analyze data, process property information and prepare plat maps and drawings accordingly.

Working knowledge of land surveying techniques and legal procedures concerning local property and personal taxation, with ability to apply procedures and requirements to specific tasks.

Working knowledge of GIS hardware, software, and usage, including ability to read related maps and input data.

Comprehensive application of software used in the Assessor's, Auditor's, Building, Planning, Recorder and Treasurer's offices.

Ability to apply knowledge of people and locations, plan/layout assigned work projects, and read/interpret detailed prints, sketches, specifications and maps.

Working knowledge Practical application of English grammar, spelling, and punctuation, and ability to use standard office equipment, including but not limited to computer, keyboard, copier, fax machine, telephone, and calculator.

Ability to effectively communicate orally and in writing with co-workers, other County departments, Department of Natural Resources (DNR), Indiana Department of Environmental Management (IDEM), and Department of Local Government Finance, realtors, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to perform the statutory duties as prescribed for the County Assessor's Office as authorized by the Assessor and state of Indiana.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to work alone with minimum supervision and with others in a team environment- often amidst frequent distractions and interruptions, and under pressure from formal schedules, deadlines, and high volume operations.

Ability to work on several tasks at the same time and work rapidly for long periods, often under time pressure, and sometimes at a moments notice with little time for completion.

Ability to occasionally testify in legal proceedings/court as required.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally work extended hours and travel out of town for training/conferences, sometimes overnight.

Possession of a valid Indiana driver's license and demonstrated safe driving record.

## III. <u>RESPONSIBILITY</u>:

Incumbent performs a variety of duties according to a flexible, customary routine with priorities determined by seasonal deadlines and service needs of the public. Incumbent has full discretion and authority allowed under the County Assessor's policies, procedures, and practices in making reassessment valuation decisions. Incumbent is responsible for creating training materials and educating new and veteran assessing officials and facilitates technological guidance within the assessor's office. Errors in decision or accuracy of work are readily detected by procedural safeguards or through periodic supervisory review of work. Undetected errors may result in loss of time and revenue within department and loss of time for correction.

## IV. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent contact with co-workers, other Monroe County departments, City of Bloomington Departments, Town of Ellettsville Departments, Department of Natural Resources (DNR), Indiana Department of Environmental Management (IDEM), and Department of Local Government Finance (DLGF), Indiana Legislative Services Agency (LSA), Economic Revitalization Committees, realtors, attorneys, tax representatives, appraisers, title companies, Nexus Group Contractors, software vendors, GIS vendors and the public for a variety of purposes, including explaining and interpreting departmental policy and ensuring proper accomplishment of duties.

Incumbent reports directly to Chief Deputy Assessor and/or County Assessor.

#### V. PHYSICAL EFFORT AND WORKING ENVIRONMENT:

Incumbent performs duties in a standard office environment, in a vehicle, and in the field, including sitting/walking at will, sitting for long periods, lifting/carrying objects weighing up to 25 pounds, close/far vision, speaking clearing, hearing sounds/communication, and driving. Incumbent is exposed to normal hazards associated with driving a vehicle and working in the field, including exposure to inclement weather. Incumbent may be exposed to potentially irate/hostile individuals.

Incumbent occasionally works extended hours and travels out of town for training/conferences, occasionally overnight.

#### APPLICANT/EMPLOYEE ACKNOWLEDGEMENT

The job description for the position of GIS Assessment Specialist/Deputy for the Monroe County Assessor Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes\_\_\_\_No\_\_\_\_

Applicant/Employee signature	Date	
Type or Print name		
$\diamond$		
I have reviewed the job duties, requirements and r	responsibilities contained herein with the en	nployee.
Department Head/Supervisor signature	Date	

Type or Print name

Date 9/13/2023

# **Employee Job Questionnaire**

## COUNTY OF MONROE, INDIANA

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

Position Title: GI	S Assessment Sup	ervisor/De	eputy			_1.5.13.13.13.1 
Department: Mor	nroe County Assesso	or's Office	·		-	
Employee Name:	Alexandra Goveia		in the last	· · · ·	·	

# FLSA Status: O Exempt • Non-exempt

#### • Purpose •

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- a department reorganization study
- a measure of how well you perform your duties

#### • Instructions •

- 1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
- 2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
- 3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.

4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

#### DO NOT DETACH THIS INSTRUCTION SHEET

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# Helpful Hints for Completing the Job Questionnaire

Please be aware that this project does  $\underline{NOT}$  involve performance evaluations of individuals. We aren't collecting information about <u>how</u> you perform, only <u>what</u> you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner*, *Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a "snap shot" of the basic functions of a position – it is <u>not</u> a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands <u>the essential functions and the skills necessary to perform the job</u>.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

• You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, "Maintains statistics on computer for Indiana Department of Environmental Management (IDEM)."

• Also, **explain any terminology that may be unique to your department**, such as report names and form numbers. For example, "*Complete XQ325 forms*" may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, "*Complete payment assistance application forms*."

• Are machines, equipment, or special tools involved in accomplishing tasks? For example, "*Post payments*" could involve a computer or writing in manual ledgers, and "*Update maps*" could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

# **Section I Essential Functions of Position**

#### 1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

I coordinate the use of GIS for assessment purposes, process property transfers, plats and splits, and assign land values.

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

#### If Duties Section of your existing job description is accurate please note "see existing description' and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

	Essentiality	Frequency	
Supervise subordinate personnel	<u></u>	<u>_</u> <u>G</u>	
<b>ESSENTIALITY</b>	<b>FREQUENCY</b>		
A= Marginal function of the job B= Essential function of the job	C= Perform annual D= Perform quarter E= Perform month F= Perform weekly G= Perform on regu	'ly at a minimum y at a minimum at a minimum	
List Primary Duties:			Essen Freq

#### **List Primary Duties:**

Performs various GIS duties, such as producing printed maps, providing GIS products & 1. information for reports & presentation, creating, maintaining, and updating databases, operating computer software to update maps, and providing technical assistance for department.

2. Coordinates Geographic Information Systems (GIS) usage for department, including using ortho maps and land use tables and operating GIS digital mapping computer, including digitizing ownership, mapping numbers, soil identification, and proper use and locations and land valuation.

llo I

G

B

3.

4. Maintains property records with land splits, combinations, surveys, plats, annexations and transfers, new and additional assessments, and changes. Generates property assessment records for newly platted subdivisions and parcels.

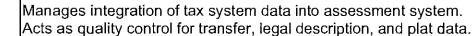
5. Generates new property subdivisions in the assessment system using historical plats and deed records, aerial photos, and survey documents to accomplish tasks.

6. Processes Classified Forest Wildlife (CLFW) CAMA (Computer Assisted Mass Appraisal) system. Reviews applications for CLFW using GIS traverses classified survey to identify USDA soil types, land use types, and eligibility/ineligibility of land being assigned CLFW by DNR.

7. Calculates assessment for back taxes and penalties for withdrawals from Classified Forestry program by determining USDA soil type, till ability, wooded coverage of withdrawn area, and calculating an average per acre agricultural per assessment year. Distributes calculation to Aud

8. Researches legal documents to ensure correct platting of property descriptions, and property in use. Including deeds, surveys, resolutions, court orders, declarations, plats, covenants and restrictions, mortgages, leases and contracts.

9. Answers combination and un-combination requests from taxpayers by identifying if parcels can be combined based on legal description, location, and deeded name. Moves improvements and valuations as determined by updated active parcel(s).



F

В

В

F









|--|



- 10. Reviews and processes Solar, GEO-thermal and homestead credit deduction applications, determining validity of exemptions. Calculates tax caps for land and structures for tax purposes.
- B E
- B E



B D

В	С

- Prepares reports monthly check and balances to maintain accurate records and discover potential improvements to procedures, quality control, time management, and accuracy. Generates comprehensive data reports by request from various county, city, state and private individuals.
- 12. Authors documentation and trains staff, for best practices, standard operating procedures, training manuals for all office procedures. Procures and provides educational resources for staff to advance the skills of the office. Updates documentation to keep relevant.
- 13. Interprets abatement resolutions from the governing bodies of the County, and other local governments. Corresponds closely with the representatives of the governing bodies, other departments, tax reps, taxpayers, and attorneys on procedures, required forms and deadlines.
- 14. Determines the base rate of any existing improvements. Receives, analyses, and stores all documentation related to abatement. Assesses new construction of abated property and calculates the difference to determine Abatable value for Auditor. Verifies abatement percentage.

# Section II

#### Job Requirements/Training/Certification

1. Check level of formal education that is <u>required</u> for your position. When specifying college degrees, please identify acceptable fields of study.

High school diploma/GED	ssociate Degree 📝 Baccalaureate	Degree Masters Degree	æ
Other (Please describe):			
Acceptable fields of study: GIS Mappin	<u>g</u>		· · · ·
2. Specialized training, certification Public Accountant).	n, and/or specific experience <u>requir</u>	<u>ed</u> for your position (suc	h as Certified

State of Indiana Level 3 Indiana Assessor/Appraiser Certification Yearly continued education

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3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

GIS Mapping, Assessing, Training others, Public speaking,

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

Indiana Code, and Indiana Administrative code, memos newsletters from DLGF, DLGF Assessment Manual, ESRI training catalog, GIS news publications, IAAO newsletters, IAAO texts

- 5. Does your position require that you have a valid driver's license? Yes O No If yes, for which duties? Site visits, conference/ training attendance
- 6. Does your position require you to be at least 21 years of age? O Yes O No

#### 7. Does your position <u>require</u> passage of a:

Medical exam?	OYes	⊙No
Drug test?	⊙Yes	O No
Psychological exam?	OYes	⊙ No
Written exam?	• Yes	ONo

Other tests: Completion of Level 2 Exam w/in 2 years of hire date & Level 3 Exams w/in 4 years of hire date.

#### 8. Check and list equipment you operate as a regular part of performing your duties:

Computer	Typewriter	Calculator	Transcriber/dictaphone	Vehicle
Other (Pleas	se describe)		······································	
			· · ·	

# 9. Your fundamental job duties may involve some relationship between you and <u>data</u> (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that <u>most accurately</u> describe your involvement with data.

Compare or observe similarities and differences between data, people, or things.

- Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing \_\_\_\_\_ operating budget, determining charges.
- Compile, collate, or classify data.
- Analyze, evaluate, observe, diagnose, investigate.
- Coordinate, place, make determinations, take action based on data analysis.
- Fabricate data to discover facts or develop concepts or interpretations.

10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that <u>most accurately</u> apply to your job responsibilities.

- Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).
- File, post, mail materials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).
- Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).
- Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

# Section III

## **Difficulty of Work/Responsibility**

- 1. Which of the following phrases best describes the type of supervision you receive?
- O Immediate supervision. Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- Assignments and objectives set jointly by immediate supervisor and myself. Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- Indirect or occasional supervision. Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- General supervision. Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- Administrative or advisory direction from a board or CEO. Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

# 2. Which of the following phrases <u>best</u> describes the criteria for which your work is reviewed? Work is reviewed <u>primarily</u> for...

-				
l	Attainment of objectives	Appropriate supervision or directi	tion of assigned operations	
ſ	Compliance with precedent	Adherence to instructions/guidelin	ines 🗹 Compliance with legal requirement	ıts
-	Technical accuracy	Compliance with Department pol	licy 🔲 Effect on Department goals/object	tives
Ľ	Soundness of judgment	Other (please describe):		7
	If you checked more than two,	please provide explanation:		
		and the second		1

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# 3. Check one of the following statements that <u>most accurately</u> describes the judgment you use in performing fundamental job duties.

- O Decisions are always determined by specific instructions or existing, well established policies and procedures.
- On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- O Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- O Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please explain and provide examples*.

Running reports to identify discrepancies in data, to research recorded data, and investigate use.

#### 5. What programs, persons and/or functions are directly affected by the decisions you make?

Staff assigned to project, property records and assessments, and taxpayers.

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

In depth research/comparison of condos, & all relevant recorded documents, find parcels that need reassessed, & sending field reviewer out to reassess. Identified and applied percentages of ownership to condo parcels. County Assessor can overrule.

#### Section IV

#### Personal Work Relationship/Supervisory

1. What is the name and position title of your immediate supervisor?

Supervisor: Laura (Shelly) Jordan Title: Reassessment Property Specialist Supervisor/Deputy

2. Complete A) and B) only if you supervise or direct the work of others:

#### A) List names and position titles of employees you supervise or direct as a regular part of your duties.

Part Time/Seasonal Employees Real Estate Reassessment specialist/Deputy

B) (	Check which statements most accurately describe your managerial/supervisory responsibilities.				
	Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.				
	Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.				
$\checkmark$	Interview candidates for openings and make hiring recommendations.				
	Make hiring decisions.				
7	Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.				
$\checkmark$	Plan, delegate and control work assignments and special projects to assigned staff.				
$\checkmark$	Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.				
$\checkmark$	Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.				
	Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.				
	Evaluate the performance results of assigned staff. Discuss present and past performance with each person. Keep supervisor informed of performance discussion results.				
	Review salaries of assigned staff and recommend changes when warranted.				
	Recommend personnel actions, such as promotions, transfers, demotions.				
	Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.				
	Maintain discipline and recommend corrective action as warranted.				
	Communicate and administer personnel programs and procedures for my area in accordance with approved policies.				
3. I	ist other departments, agencics, organizations, and others with whom you regularly communicate.				
	Other county, city and town Departments, DNR, and Department of Local Government Finance (DLGF), Economic Revitalization Committees, Realtors, attorneys, tax representatives, appraisers, title companies, Nexus Group Contractors, software vendors, GIS vendors				
	Check which statements <u>most accurately</u> describe your contact with employees, customers, governmental cials, or the general public.				
$\checkmark$	<b>Cooperative Work Relationship:</b> Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.				
$\checkmark$	<b>Render Service:</b> Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.				
$\checkmark$	Instruct: Teach or present subject matter to others through explanation, demonstration and supervised practice.				
$\checkmark$	<b>Negotiate:</b> Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.				

Mentor: Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

# Section V Physical Effort/Work Environment 1. Which of the following best describes your primary working environment? □ Laboratory ☑ Standard office □ Garage/shop □ Manufacturing setting □ Other (please describe): □ □ f you checked more than one, please provide additional explanation.

2. Which of the following best describes your <u>primary</u> working conditions? <u>ESSENTIALITY</u>

> N/A= Not Applicable to job A= Marginal requirement of job B= Essential requirement of job

<u>Esse</u>	entiality	Essentiality
В	work alone with minimum supervision	B work with others in a team environment
В	work under time pressure	B work rapidly for long periods
В	work on several tasks at the same time	B understand and carry out oral instructions
В	read/carry out simple written instructions	B memorize and retain instructions
В	apply knowledge of people, locations	B present findings in oral or written form
В	plan and layout assigned work projects	A testify in legal proceedings/court
В	compute/calculate, such as interest	
В	count, make simple arithmetic additions/subtractions	5
B	read/interpret detailed prints, sketches, layouts, spec	ifications, maps
В	prepare detailed reports, such as financial statements	s, sales activity, product feasibility
A	plan and present public speaking presentations, fund	raisers, special events
В	sitting & walking at will	B sitting for long periods
A	standing/walking for long periods	A walking on uneven terrain

A	work in extreme hot or co	d temperatures	A	work in wet/ic	y surroundings	
N/A	respond to emergencies fr	om off-duty status	N/A	work with or r	near chemicals (please list)	
N/A	work near fumes, odors, dust, dirt (please describe) Irate taxpayers					
N/A	work in a noisy environment (describe noise source)					
N/A	work in confined areas (pl	ease describe)				
N/A	wear protective clothing o	r equipment (please describe	.)			
N/A	work in high places, such	as ladders, roofs, bucket true	ck (pleas	se describe)		
A	work with or exposed to v	iolent/irate individuals (plea	se descr	ibe)		
N/A	respond to situations invol	ving potential physical harn	n to self	and others (pleas	se describe)	
B <sup>erna</sup> nder	lifting under 25 pounds	A lifting 25 to 50 pou	unds	A lifting	over 50 pounds	
Α	pushing/pulling objects	B carrying objects		B crouch	hing/kneeling	
В	bending at waist	B reaching		A drivin	g	
В	close vision	<b>B</b> far vision		B color	perception	
B	depth perception	B speaking clearly		B hearing	ng sounds/communication	
В	handling/grasping objects	<b>B</b> fingering objects (j	picking,	pinching)		
	· ·	y demanding activities you	ı <u>regula</u>	<u>rly</u> perform in y	your job.	
Sta	nding/Sitting for long periods					
Lor	ng periods in front of a computer	screen				
Lifti	ng heavy records or training boo	ks	• .			
<b>4.</b> Lis	st the three most emotion:	ally demanding activities y	ou <u>regu</u>	<u>larly</u> perform in	a your job.	
Dea	aling with difficult taxpayers		····	· · · · · · · · · · · · · · · · · · ·		
Str	tressful deadlines					
Tec	chnical failures that delete my wo	ork.			1999 - 1999 	
5. W	5. What is your normal work schedule (example, 8 a.m. 4 p.m. M-F)?					
8 a	a.m. to 4 p.m. M-F					
		Never	Regn	larly Occasion	allv	

	Never	Regularly	Occasionally
c. work evenings	0	0	۲
d. travel out of town, but not overnight For what purpose?	0	0	۲
Training			
c. travel out of town overnight For what purpose?	0	0	۲
Conferences			
f. respond to emergencies on 24-hr basis	۲	0	0
g. on call on rotation basis	۲	0	0

7. Provide any other examples/information which would be helpful in understanding the physical and= mental requirements of your job.

Producing high priority data to those who request it within an extremely short deadline.

8. Is your position politically appointed by a recognized Department Head or Elected Official according to= IC 36-2-16-4? Yes O No <sup>(a)</sup>

# Section VI

#### **Certifications**

Employee: I certify that the above statements are an accurate and fair description of my position.

Name (print or type) Alexandra Goveia	Hire date 11/26/2007
Title GIS Assessment Specialist/Deputy	Department Assessor
Signature	Date

*Supervisor:* I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes  $\bigcirc$  No  $\bigcirc$ 

Signature	C	all Mh.	Date	9-15-23	

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc. 118 South Franklin Street Muncie, IN 47305 Phone: (765) 286-5195 Fax: (765) 286-2824

#### POSITION DESCRIPTION COUNTY OF MONROE, INDIANA

Administrative Assistant to the PTABOA/Deputy-Level 3 Administrator to the PTABOA/Deputy-Level 3
Assessor
<del>8:00 a.m 4:00 p.m., M-F</del>
As Assigned
<b>COMOT (Computer, Office Machine Operation, Technician)</b>
PAT C (Professional, Administrative, Technological)

DATE WRITTEN: September 1995
DATE REVISED: May 2015, February 2021

STATUS: Full-time FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Administrative Assistant to the PTABOA/Deputy-Level 3 for the Monroe County-Assessor's Office, responsible for coordinating the property tax assessment appeal process for realproperty valuation of residential, commercial, new construction, industrial, and agricultural and assisting the public.

Incumbent serves as Administrator to the PTABOA/Deputy-Level 3 for the Monroe County Assessor's Office under direction, and independently of the Assessor. Authorized to make decisions during the informal and formal appeals processes, as well as field inspections. Responsible for directing workflow of the appeals process and supervising all real and personal property appeals, including tax exempt and homestead deduction. Responsible for property valuation on residential, commercial, new construction, industrial, and agricultural. Supervises and guides employees and taxpayers with real estate, business personal property, manufactured homes and sales disclosures.

#### **DUTIES:**

Adhering to State law, incumbent performs informal hearings with taxpayers, which includes verifying accuracy of data, conducting market analysis, reading and interpreting USPAP compliant Appraisals with the goal of resolution.

Coordinates Oversees all functions of the Property Tax Assessment Board of Appeals (PTABOA), including receiving formal property tax appeals, maintaining accurate records and files, scheduling places and times of hearings, tracking progress of appeals to ensure adherence to state law for time limits of hearings and decisions and obtaining information necessary to defend assessments, such as market data, neighborhood delineation maps, letters, and related information regarding tax bills.

Reviews Analyzes appeal petitions to determine accuracy and accordance with state law and administrative requirements. Returns defective appeal petitions to taxpayer or taxpayer representatives with appropriate evaluation. Monitors deadlines for resubmitting petitions and sends notices of dismissal as appropriate. Attends various meetings and attends training sessions as required or needed.

Notifies parties of PTABOA hearings, including taxpayers, taxpayer representatives, attorneys, and witnesses. Mails notices, ensuring appropriate addresses.

Processes submitted State Appeals. Compiles all necessary information for the attorneys, tax representatives and the Indiana Board of Tax Review. Maintains accurate records and files, tracks progress of appeals.

Creates annual PTABOA report and submits to the IBTR before the State deadline.

Educates and aids taxpayers in understanding property assessments, including reviewing property card, answering questions, explaining information, resolving complaints to aide in understanding of data.

Performs extensive research of current and sold properties for the completion of accurate assessment data and Indiana State compliancy. Including on site evaluations and analyzing market value trends.

Assists the Auditor's office in identifying properties within the TIF district that are under appeal. Providing reports that show possible property taxation loss to the City/County.

Processes applications for non-taxable exemptions, including reviewing, investigating, and determining validity. Applies cost tables to arrive at assessed value of residences and mails notifications annually as required.

Works with hostile/irate individuals in a professional manner. Often diffusing stressful situations in order to achieve resolution.

Accompanies Assessor in meetings with taxpayers, both in the office and at neighborhood association gatherings, after office hours.

Serves as liaison with Nexus field consultants assessing new construction damaged by weather or fire and assists with assessments.

Performs immediate on-site evaluations of damaged properties due to natural disasters and potentially unsafe conditions (i.e.flooding, storms, tornados, fire, clandestine labs). Including obtaining insurance documentation, evaluating amount of damage to property, correcting assessments accordingly and maintaining accurate records of properties that need reassessed once damage is remediated.

Performs field meetings with taxpayers and reviews sales over 5% with county Assessor. Proofreads and scans TIF projects and distributes Form 11s.

Updates state approved forms for use in valuation, appeals, and fee collections.

Maintains communication with the DLGF, IBTR, and Tax Court. Educates staff on various ongoing State, Tax Court and Legislative changes, and House and Senate bills and proceedings.

Updates and maintains recorded property values and adds potential property value changes in INCama and generates paperwork.

Provides aid in creating new construction assessments and reassessment of multiple taxing units. Including creating sketches of new construction homes and verifying data from field reviews. Working closely with multiple departments within the county to ensure proper data. Possessing the ability to work in multiple tax years consecutively.

Communicates with contracted vendors to verify reassessment data is accurate.

Develops a Gross Rent Multiplier annually, based on extensive research of rental information in the entire county, as well as University properties.

Provides Quality Control and Assistance for the data submission to the State and Auditor's office.

Exchanges information frequently with other County departments.

Answers telephone, determines nature of call, answers questions or directs to appropriate individual or agency.

Assists citizens at the counter by answering questions, making copies of documents or directing to appropriate individual or office. Educates and resolves taxation questions and concerns for taxpayers.

Utilizes various methods to communicate with taxpayers including mail, email, text, zoom, teams, telephone and in person.

Performs duties of other office staff as required. Assists other department personnel in enteringresidential and commercial data on computer, and making corrections to property sketches.

Acts as hearing officer and performs site visits, in absence of the Assessor.

Mentors new county officials/employees on proper appeals procedures.

Communicates with attorneys, tax representatives, appraisers, rental companies, title companies, judges, state and county officials, while maintaining a level of professionalism.

Utilizes the GIS, conducts Agricultural land analysis, including researching Soil ID Overlay reports. Assists taxpayers in filing Classified Forrest and Personal Property Farm Forms.

Performs related duties as assigned.

#### I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma or GED. Associates degree and/or related previous experience preferred.

Possession of and ability to maintain possession of Level 3 Assessor/Appraiser certification. Maintain current knowledge of real estate market by reading related publications. Participates in continued education required by State Law to maintain job certifications throughout the year.

Working knowledge of state of Indiana property tax code, appeals process, and assessing principles

according to the IAAO (International Association of Assessing Officials) and techniques and ability to apply such knowledge to a variety of interrelated process and tasks.

Working knowledge of GIS computer procedures and ability to apply such knowledge to a variety of interrelated processes, tasks, and operations.

Working knowledge of County land areas and applicable state and local codes and terminology.

Working knowledge of State and County Laws regarding real estate, deduction, and associated legal procedures concerning local property and personal taxation, with ability to apply procedures and requirements to specific tasks.

Working knowledge of English grammar, spelling, and punctuation, and ability to use standard office equipment, including but not limited to computer, keyboard, copier, fax machine, telephone, and calculator, FTR recording software and Zoom.

Comprehensive knowledge of software used in the Assessor, Auditor, Building, Planning, Recorder and Treasurer's Offices.

Ability to effectively communicate orally and in writing with co-workers, other County departments, attorneys, taxpayer representatives, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to perform the statutory duties as prescribed for the County Assessor's Office as authorized by the Assessor.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to work alone with minimum supervision and with others in a team environment, often with frequent distractions and interruptions, and under pressure from formal schedules, deadlines, and high-volume operations.

Ability to work on several tasks at the same time and work rapidly for long periods, often under time pressure, and sometimes at a moment's notice with little time for completion.

Ability to occasionally testify in legal proceedings/court as required.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally work extended hours and travel out of town for training/conferences, sometimes overnight.

Possession of a valid Indiana driver's license and demonstrated safe driving record.

## II. <u>RESPONSIBILITY</u>:

Incumbent performs duties according to a flexible, customary routine with priorities determined by seasonal deadlines and service needs of the public. Incumbent has full discretion and authority allowed under the County Assessor's policies, procedures, and practices in making assessment valuation decisions. Errors in incumbent's work are prevented through legally defined procedures and detected by supervisory review and/or notification from other departments and/or agencies. Undetected errors may result in loss of money and/or loss of time for correction.

Incumbent has full discretion and authority allowed under the County Assessor's policies, procedures, and practices in making assessment valuation decisions. Incumbent is authorized to make decisions during the informal and formal appeals processes, as well as field inspections, independently of the Assessor. Responsible for directing workflow of the appeals process and supervising all real and personal property appeals, including tax exempt and homestead deduction. Responsible for property valuation on residential, commercial, new construction, industrial, and agricultural. Supervises and guides employees and taxpayers with real estate, business personal property, manufactured homes and sales disclosures.

## III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent contact with other co-workers, other County departments, attorneys, taxpayer representatives, and the public for a variety of purposes, including receiving daily assignments, explaining and interpreting departmental procedures, and assuring proper accomplishment of duties.

Incumbent reports directly to Assessor.

#### IV. PHYSICAL EFFORT AND WORKING ENVIRONMENT:

Incumbent performs duties in a standard office environment, in a vehicle, and in the field, involving sitting/walking at will, sitting for long periods, lifting/carrying objects weighing up to 50 pounds, close/far vision, speaking clearly, hearing sounds/communication, and driving. Incumbent is exposed to normal hazards associated with driving a vehicle and working in the field, including exposure to inclement weather. Incumbent may be exposed to potentially irate/hostile individuals and unsafe environments (i.e. tornado, flooding, storms, fire, clandestine labs).

Incumbent occasionally works extended hours and travels out of town for the purpose of training/conferences, occasionally overnight.

#### APPLICANT/EMPLOYEE ACKNOWLEDGEMENT

The job description for the position of Administrative Assistant to the PTABOA/Deputy-Level 3 for the Monroe County Assessor Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes\_\_\_\_\_No\_\_\_\_\_

Applicant/Employee signature

Date

Type or Print name

~~~~~~~~~~

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

Type or Print name

Date 9/14/2023

# **Employee Job Questionnaire**

## COUNTY OF MONROE, INDIANA

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

| Position Title: | Administrator to the PTABOA/Deputy Level 3 |        |                                          |                                        |  |
|-----------------|--------------------------------------------|--------|------------------------------------------|----------------------------------------|--|
| Department:     | Assessor                                   | · · ·  |                                          | ···· : : · · · · · · · · · · · · · · · |  |
| Employee Na     | me: Neely Druin                            |        | an a |                                        |  |
| FLSA Sta        | tus: OExempt                               | Non-ex | cempt                                    |                                        |  |

#### • Purpose •

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- a department reorganization study
- a measure of how well you perform your duties

#### • Instructions •

- 1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
- 2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
- 3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.

4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

#### DO NOT DETACH THIS INSTRUCTION SHEET

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## Helpful Hints for

## **Completing the Job Questionnaire**

Please be aware that this project does  $\underline{NOT}$  involve performance evaluations of individuals. We aren't collecting information about <u>how</u> you perform, only <u>what</u> you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner*, *Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a "snap shot" of the basic functions of a position – it is <u>not</u> a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands <u>the essential functions and the skills necessary to perform the job</u>.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

• You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, "Maintains statistics on computer for Indiana Department of Environmental Management (IDEM)."

• Also, **explain any terminology that may be unique to your department**, such as report names and form numbers. For example, "*Complete XQ325 forms*" may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, "*Complete payment assistance application forms*."

• Are machines, equipment, or special tools involved in accomplishing tasks? For example, "*Post payments*" could involve a computer or writing in manual ledgers, and "*Update maps*" could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

## 1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

Responsible for directing workflow of the appeals process, supervising all appeals, and property valuation of Real Estate parcels.

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

## If Duties Section of your existing job description is accurate please note "see existing description' and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

| essentianty and nequency. For example,                              | Essentiality                                                                                       | Frequency                                               |            |
|---------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|---------------------------------------------------------|------------|
| Supervise subordinate personnel                                     | <u></u>                                                                                            | G                                                       |            |
| ESSENTIALITY                                                        | <b>FREQUENCY</b>                                                                                   |                                                         |            |
| A= Marginal function of the job<br>B= Essential function of the job | C= Perform annua<br>D= Perform quarte<br>E= Perform month<br>F= Perform weeky<br>G= Perform on reg | erly at a minimum<br>Ily at a minimum<br>y at a minimum |            |
| List Primary Duties:                                                |                                                                                                    |                                                         | Essen Freq |

1. Performs informal hearings with taxpayers, which includes verifying accuracy of data, conducting market analysis, reading and interpreting USPAP (Uniform Standards of Professional Appraisal Practice) compliant Appraisals with the goal of resolution.

2. Oversees and supervises all functions of the Property Tax Assessment Board of Appeals (PTABOA), including accepting formal property tax appeals, maintaining accurate records and files, scheduling places and times of hearings, tracking progress of appeals.

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- Researches, analyzes, and interprets residential property data, using field work, building permits and blueprints to develop assessments for new construction. Uses CAD based software to sketch building outlines, create parcel information and make necessary updates to property.
- Appraisers, rental companies, title companies, Judges, State and County officials, Educates staff on various ongoing legislative changes and House and Senate Bills and proceedings.
- 8. Maintains communication with the DLGF, IBTR, Tax Court, Attorneys, Tax Representatives,
- 7. Supervises and educates employees and taxpayers with real estate, business personal property, manufactured homes and sales disclosures, including reviewing property card, answering questions, explaining information and resolving complaints.
- Representatives and the Indiana Board of Tax Review. Maintains accurate records and files, implements settlement changes and sends paperwork, tracks progress.

Oversees all State Appeals. Compiles all necessary information for the Attorneys, Tax

- property and sends paperwork, schedules unresolved appeals with the PTABOA.
- 5. Manages contracted Commercial Advisor on all commercial appeals. Databases, organizes, emails Tax Representatives, implements settlement changes to

assessments, such as market data, neighborhood delineation maps,

Researches and analyzes information necessary to defend

letters, and related information regarding assessments.

3.

4.

6.

9.

attorneys,

Analyzes appeal petitions to determine accuracy, returns defective petitions to taxpayer or tax representatives, monitors deadlines for resubmitting petitions and sends notices of dismissal. Notifies parties of PTABOA hearings, including taxpayers, tax representatives.

G В

| В | F |
|---|---|





В G

В G

- 10. Reassesses parcels in multiple taxing units. Works closely with multiple departments within the county to ensure proper data. Possesses the ability to work in multiple tax years consecutively. Communicates with contracted vendors to verify data accuracy.
- 11. Manages taxpayers concerns by verifying data accuracy through on-site inspections, with and in place of the Assessor. Responsible for mapping route, scheduling appointments, measuring and collecting data, making corrections and maintaining database.
- 12. Develops a Gross Rent Multiplier annually, based on extensive research of rental information in the entire county, as well as University properties.
- 13. Performs immediate on-site evaluations of damaged properties, due to natural disasters, in unsafe conditions (i.e.flooding, storms, tornadoes, fire, clandestine labs). Including obtaining insurance documentation, evaluating amount of damage to property, correcting assessed values
- <sup>14.</sup> Provides Quality Control and Assistance for data submission to the State and Auditor's office. Creates and updates State approved forms for use in valuation, appeals, and fee collections.

## Section II

## Job Requirements/Training/Certification

1. Check level of formal education that is <u>required</u> for your position. When specifying college degrees, please identify acceptable fields of study.

High school diploma/GED Associate Degree Baccalaureate Degree Masters Degree

Other (Please describe):

Acceptable fields of study: Marketing, Finance, Business Administration

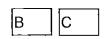
2. Specialized training, certification, and/or specific experience <u>required</u> for your position (such as Certified Public Accountant).

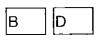
State of Indiana Certified Level 1, Level 2 and Level 3 Assessor-Appraiser. Yearly Continuing Education Credit Hours

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## 3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

Knowledge of the fundamentals of real property mass appraisal, income approach to value, analytical skills, Uniform Standard of Professional Appraisal Practice (USPAP), conflict resolution, math, statistics, problem solving, public speaking and ethics.

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

Real Property Assessment Guidelines, Indiana State Law and legislation, Real Estate property listing publications, Levels 1-3 textbooks and reference materials, DLGF legal documents and memos.

5. Does your position require that you have a valid driver's license? • Yes O No If yes, for which duties?

On-site inspections, Continuing Education

6. Does your position require you to be at least 21 years of age? O Yes O No

## 7. Does your position <u>require</u> passage of a:

| Medical exam?       | ⊖Yes | ⊙ No |
|---------------------|------|------|
| Drug test?          | ●Yes | O No |
| Psychological exam? | OYes | • No |
| Written exam?       | ⊙Yes | ΟNο  |

Other tests: Level 1, Level 2 and Level 3 Certification within 4 years of hire date.

## 8. Check and list equipment you operate as a regular part of performing your duties:

| <b>—</b> 1   | v1                      | —                           | Transcriber/dictaphone     | —               |
|--------------|-------------------------|-----------------------------|----------------------------|-----------------|
| Other (Pleas | se describe) FTR<br>mea | (For the Record suring tape | d) Recording Equipment, Ov | wl Zoom Camera, |

# 9. Your fundamental job duties may involve some relationship between you and <u>data</u> (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that <u>most accurately</u> describe your involvement with data.

Compare or observe similarities and differences between data, people, or things.

- Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing operating budget, determining charges.
- Compile, collate, or classify data.
- Analyze, evaluate, observe, diagnose, investigate.
- Coordinate, place, make determinations, take action based on data analysis.
- Fabricate data to discover facts or develop concepts or interpretations.

10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that <u>most accurately</u> apply to your job responsibilities.

Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).

| $\checkmark$ | File, post, mail materials; copy data from one document to another; interview to obtain information (example: |
|--------------|---------------------------------------------------------------------------------------------------------------|
|              | keep record of purchase orders; discuss list of products with customers, take phone messages/customer         |
|              | complaints).                                                                                                  |

Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).

Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

## Section III

## **Difficulty of Work/Responsibility**

- 1. Which of the following phrases best describes the type of supervision you receive?
- O Immediate supervision. Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- Assignments and objectives set jointly by immediate supervisor and myself. Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- O Indirect or occasional supervision. Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- General supervision. Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- Administrative or advisory direction from a board or CEO. Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

## 2. Which of the following phrases <u>best</u> describes the criteria for which your work is reviewed? Work is reviewed primarily for...

| Attainment of objectives      | Appropriate supervision or dir |                 |                       |               |
|-------------------------------|--------------------------------|-----------------|-----------------------|---------------|
| Compliance with precedent     | Adherence to instructions/guid | lelines 🔽 Comp  | liance with legal rec | quirements    |
| Technical accuracy            | Compliance with Department     | policy 🔲 Effect | on Department goa     | ls/objectives |
| Soundness of judgment         | Other (please describe):       |                 |                       |               |
| If you checked more than two, | please provide explanation:    |                 |                       |               |

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## 3. Check one of the following statements that <u>most accurately</u> describes the judgment you use in performing fundamental job duties.

- O Decisions are always determined by specific instructions or existing, well established policies and procedures.
- On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- O Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- O Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please explain and provide examples*.

Analyzing market data to ensure accurate assessments (i.e. compiling sales information for each delineated area within the County, to determine if the trend in the market is rising or falling).

5. What programs, persons and/or functions are directly affected by the decisions you make?

The PTABOA, Monroe County Taxpayers, Auditor, Treasurer, Coworkers, Property Valuations, INCAMA, GIS

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

Assessed valuation changes, using market data research. The County Assessor can override my decision.

## Section IV

## Personal Work Relationship/Supervisory

### 1. What is the name and position title of your immediate supervisor?

Supervisor: Judith A Sharp

Title: Monroe County Assessor

### 2. Complete A) and B) only if you supervise or direct the work of others:

### A) List names and position titles of employees you supervise or direct as a regular part of your duties.

Jennifer Hawkins-Assistant Administrator to the PTABOA Jack Davis-President of the PTABOA Vickey Reeves-PTABOA member Lindsey Smith-PTABOA member

| B) (         | Check which statements most accurately describe your managerial/supervisory responsibilities.                                                                                                                                        |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|              | Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.                                                                                                |
|              | Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.                                                                                                                   |
| V            | Interview candidates for openings and make hiring recommendations.                                                                                                                                                                   |
|              | Make hiring decisions.                                                                                                                                                                                                               |
| V            | Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.                                                                                   |
| $\checkmark$ | Plan, delegate and control work assignments and special projects to assigned staff.                                                                                                                                                  |
| $\checkmark$ | Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.                                                                                                                            |
|              | Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.                                                                                                                                 |
|              | Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.                                                                                 |
|              | Evaluate the performance results of assigned staff. Discuss present and past performance with each person. Keep supervisor informed of performance discussion results.                                                               |
|              | Review salaries of assigned staff and recommend changes when warranted.                                                                                                                                                              |
|              | Recommend personnel actions, such as promotions, transfers, demotions.                                                                                                                                                               |
| $\checkmark$ | Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.                                                                                             |
|              | Maintain discipline and recommend corrective action as warranted.                                                                                                                                                                    |
|              | Communicate and administer personnel programs and procedures for my area in accordance with approved policies.                                                                                                                       |
| 3. L         | ist other departments, agencies, organizations, and others with whom you regularly communicate.                                                                                                                                      |
|              | Auditor, Treasurer, Planning, Building, Legal, GIS, Attorneys, Commercial Advisor, Tax<br>Representatives, Department of Local Government Finance, Indiana Board of Tax Review,<br>Indiana Tax Court, Software vendors/support staff |
|              | Check which statements <u>most accurately</u> describe your contact with employees, customers, governmental cials, or the general public.                                                                                            |
| V            | <b>Cooperative Work Relationship:</b> Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.                                                                             |
| $\checkmark$ | <b>Render Service:</b> Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.                                                                                     |
| <b>√</b>     | <b>Instruct:</b> Teach or present subject matter to others through explanation, demonstration and supervised practice.                                                                                                               |
| <b>√</b>     | <b>Negotiate:</b> Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.                                                             |

Mentor: Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

## Section V

## **Physical Effort/Work Environment**

1. Which of the following best describes your primary working environment?

Laboratory

Garage/shop

✓ Standard office
☐ Manufacturing setting

le 🔽 Outdoors

If you checked more than one, please provide additional explanation.

Routine On-Site Inspections

2. Which of the following best describes your <u>primary</u> working conditions? <u>ESSENTIALITY</u>

> N/A= Not Applicable to job A= Marginal requirement of job B= Essential requirement of job

| Esse | entiality                                                               | Essentiality                                 |  |  |
|------|-------------------------------------------------------------------------|----------------------------------------------|--|--|
| В    | work alone with minimum supervision                                     | B work with others in a team environment     |  |  |
| В    | work under time pressure                                                | B work rapidly for long periods              |  |  |
| В    | work on several tasks at the same time                                  | B understand and carry out oral instructions |  |  |
| В    | read/carry out simple written instructions                              | B memorize and retain instructions           |  |  |
| В    | apply knowledge of people, locations                                    | B present findings in oral or written form   |  |  |
| В    | plan and layout assigned work projects                                  | B testify in legal proceedings/court         |  |  |
| В    | compute/calculate, such as interest                                     |                                              |  |  |
| B    | count, make simple arithmetic additions/subtraction                     | S                                            |  |  |
| В    | read/interpret detailed prints, sketches, layouts, specifications, maps |                                              |  |  |
| В    | prepare detailed reports, such as financial statements                  | s, sales activity, product feasibility       |  |  |
| A    | plan and present public speaking presentations, fund                    | l raisers, special events                    |  |  |
| В    | sitting & walking at will                                               | B sitting for long periods                   |  |  |
| В    | standing/walking for long periods                                       | B walking on uneven terrain                  |  |  |

| B work in extreme                                                   | e hot or cold temperature              | s                  | В               | work in w             | et/icy surroundings                     |            |
|---------------------------------------------------------------------|----------------------------------------|--------------------|-----------------|-----------------------|-----------------------------------------|------------|
| N/A respond to emer                                                 | gencies from off-duty st               | atus               | В               | work with             | or near chemicals (ple                  | ease list) |
| B work near fumes                                                   | s, odors, dust, dirt (pleas            | e describe)        | 1               |                       | crawl spaces,<br>es, odors, dust, dirt) |            |
| work in a noisy of                                                  | environment (describe n                | oise source)       | Angry           | taxpayers             | (violent/irate)                         |            |
| N/A work in confined                                                | d areas (please describe)              |                    | harm)           |                       | ions (potential physi                   |            |
| N/A wear protective                                                 | clothing o <del>r</del> equipment (p   | olease describe)   |                 | er Clandes<br>nicals) | tine Lab reassessme                     | ent        |
| N/A work in high pla                                                | ices, such as ladders, roc             | ofs, bucket truck  | (please         | describe)             |                                         |            |
| B work with or exp                                                  | posed to violent/irate inc             | lividuals (pleas   | e descrit       | be)                   |                                         |            |
| A respond to situat                                                 | tions involving potential              | physical harm      | to self a       | nd others (p          | lease describe)                         |            |
| B lifting under 25                                                  | pounds B liftin                        | g 25 to 50 pour    | nds             | B in lif              | ting over 50 pounds                     |            |
| B pushing/pulling                                                   | objects B carry                        | ing objects        |                 | B cr                  | ouching/kneeling                        |            |
| B bending at wais                                                   | t B reach                              | ning               |                 | B dr                  | iving                                   |            |
| B close vision                                                      | B far v                                | ision              |                 | Bcc                   | lor perception                          |            |
| B depth perception                                                  | n B speal                              | king clearly       |                 | B he                  | aring sounds/commur                     | ication    |
| B handling/grasping objects B fingering objects (picking, pinching) |                                        |                    |                 |                       |                                         |            |
| 3. List the three most                                              | t physically demanding                 | activities you     | regular         | <u>ly</u> perform     | in your job.                            |            |
| On-site Inspections                                                 | ······································ |                    |                 |                       |                                         |            |
| Standing or sitting for lo                                          | ong periods                            |                    |                 |                       |                                         |            |
| Eye strain from compute                                             | er use                                 |                    | 1               |                       | · · · · · · · · · · · · · · · · · · ·   |            |
| 4. List the three most                                              | t emotionally demandir                 | ıg activities yo   | u <u>regula</u> | <u>urly</u> perfor    | m in your job.                          |            |
| Interaction with hostile/i                                          | rate taxpayers                         |                    |                 |                       |                                         |            |
| Informing taxpayers that                                            | at based on market data, no            | reduction in asses | sment is v      | warranted.            |                                         |            |
| Disaster on-site inspect                                            | ions                                   |                    |                 |                       |                                         |            |
| 5. What is your norm                                                | nal work schedule (exa                 | mple, 8 a.m. 4     | p.m. M-         | F)?                   |                                         |            |
| 8:00 am - 4:00 pr                                                   | n                                      |                    |                 |                       |                                         |            |
| 6. Are you required t                                               | to:                                    | <u>Never</u>       | Regula          | arly <u>Occa</u>      | <u>sionally</u>                         |            |
| a. work extended hou                                                |                                        | 0                  | 0               |                       | ۲                                       |            |

b. work weekends

0

۲

0

|                                                               | Never | <b>Regularly</b> | <b>Occasionally</b> |
|---------------------------------------------------------------|-------|------------------|---------------------|
| c. work evenings                                              | 0     | 0                | ۲                   |
| d. travel out of town, but not overnight<br>For what purpose? | 0     | 0                | ۲                   |
| Continuing Education                                          |       |                  |                     |
| c. travel out of town overnight<br>For what purpose?          | 0     | 0                | 0                   |
| Assessor's Conferences                                        |       |                  |                     |
| f. respond to emergencies on 24-hr basis                      | ۲     | 0                | 0                   |
| g. on call on rotation basis                                  | ۲     | 0                | 0                   |

7. Provide any other examples/information which would be helpful in understanding the physical and = mental requirements of your job.

Frequently work with emotionally changed individuals on-site, in office and by phone concerning property tax valuation increases.

8. Is your position politically appointed by a recognized Department Head or Elected Official according to= IC 36-2-16-4? Yes O No (a)

## Section VI

## Certifications

Employee: I certify that the above statements are an accurate and fair description of my position.

| Name (print or type) Neely Druin                        | Hire date 11/29/1999 |
|---------------------------------------------------------|----------------------|
| Title Administrative Assistant to the PTABOA/Deputy L-3 | Department Assessor  |
| Signature                                               | Date 9/14/2023       |

*Supervisor:* I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes  $\bigcirc$  No  $\bigcirc$ 

| Signature | Churchell R/m | Date | 9/14/2023 |  |
|-----------|---------------|------|-----------|--|
|           | 1 cup         |      |           |  |

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc. 118 South Franklin Street Muncie, IN 47305 Phone: (765) 286-5195 Fax: (765) 286-2824

## POSITION DESCRIPTION COUNTY OF MONROE, INDIANA

| assessment Property Specialist Supervisor/Deputy operty Director                                          |
|-----------------------------------------------------------------------------------------------------------|
| sessor<br><del>0 a.m. – 4:00 p.m., M-F</del> As Assigned                                                  |
| MOT (Computer, Office Machine Operation, Technician)<br>T D (Professional, Administrative, Technological) |
|                                                                                                           |

## DATE WRITTEN: October 2018 DATE REVISED: February 2021–September 2023

STATUS: Full-time FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Reassessment Property Specialist Supervisor/Deputy Property Director for the Monroe County Assessor's Office, responsible for assigning market value to all property types with uniformity and equity and supervising assigned staff. overseeing property valuation on agricultural, residential, commercial, industrial, and new construction. Advises on Business Personal Property, Mobile Homes, Appeals and Sales Disclosures. Supervises all divisions within the Assessor's Office and advises Assessor in personnel decisions.

## **DUTIES:**

Supervises assigned staff, including interviewing candidates and making hiring recommendations, providing orientation and training staff, planning, delegating, and controlling work assignments, reviewing and approving work products and assignments, evaluating performance, maintaining discipline, and communicating and administering personnel programs and procedures. Oversees all aspects of the Monroe County Assessor's property division and supervises assigned personnel, including communicating and administering personnel policies and procedures, providing instruction/technical assistance in customer service, computer and software usage, maintaining discipline, assisting with bookkeeping, and assuring proper and timely completion of assigned tasks.

Serves as Lead for Manages the updating and maintenance of all land and improvement records, various property transactions, and develops and implements procedural guidelines, including the internal control team, reviewing and recommending changes to department operations.

Analyzes all data base programs, implementing changes to assessment methods and protocols as needed. Prepares and evaluates technical data ensuring department results.

Facilitates in the updating and maintenance of all County plat books, GIS system attributes, geomapping of County plat information from survey documents, various property transactions, and develops and implements procedural guidelines.

Collaborates with Nexus Group to organize, coordinating and tracking Cyclical Reassessment Cycles.

## Serves as liaison with contractors, overseeing real property annual valuations and ensuring work accuracy and efficiency.

Creates and directs county-wide ongoing reassessment for new construction and existing commercial, industrial, agricultural and residential property, including measuring and collecting data, inputting permits, administering quality control, and ensuring the value on parcels are accurate. Serves as liaison in constant collaboration with Nexus Group.

Oversees and maintains data entry of all residential field, new construction work, and commercial and industrial properties and manages all commercial appeals. Researches, analyzes, and interprets residential property data, using field data, building permits and blueprints to develop assessments for new construction. Uses CAD based assessment software to sketch building outlines and create property information and make necessary updates to property record cards.

Processes building and occupancy permits from Monroe County and Ellettsville Building Department. Tracks new construction building and occupancy permits for taxation purposes and closely monitors inspector data for property completion.

Collaborates with software vendors in developing customized software for use in department operations and educates and trains staff members on assessment and GIS software and procedures.

Educates and aides taxpayers in understanding property assessments, including reviewing property card, answering questions, explaining information, resolving complaints and diffusing irate individuals to aide in their understanding. Communicates with taxpayers using various methods such as mail, email, chat, text, zoom, telephone, and in person.

Provides Auditor all valuation changes, and explanations for parcels within Taxing Increment Finance (TIF) Districts. Maintain all new construction and valuation changes within TIF related parcels within assessment system.

Reads and interprets resolutions from the governing bodies of Monroe County, The City of Bloomington and the Town of Ellettsville. Corresponds closely with the Economic Revitalization representatives of the governing bodies, tax representatives, taxpayers and attorneys, educating them on procedures, guidelines, required State forms, and State mandated deadlines, to properly track the abatement. Determines value of property prior to proposed construction or remodel of abated properties to set a base rate. Receives, analyses, and stores all documentation related to abatement. Assesses new construction of abated property, and calculates the difference to determine Abatable values which are then delivered to the Economic Revitalization Coordinator in the Auditor's office. Verifies abatement percentage applied by the auditors office for accuracy.

Adhering to state law incumbent performs informal hearings with taxpayers which includes verifying accuracy of data, conducting market analysis, reading and interpreting USPAP Compliant Appraisals with the goal of resolution.

Prepares reports monthly and annually and performs check and balances prior to submitting reports to State as required. To maintain accurate records and discover potential improvements to procedures, quality control, time management,

Generates and transmits annual data files extractions to Department of Local Government Finance, Legislative Services Agency, and other County departments as required on or before the deadline prescribed by the State of Indiana Assessment Calendar. Corresponds with DLGF and researches, corrects, and resubmits data not deemed compliant by DLGF.

Advises and provides quality control for Business tangible personal property and annually assessed mobile homes data that is submitted to the Auditor, Department of Local Government Finance, Legislative Services Agency, Assists appeals division in responding to inquiries, receiving updated data, and defusing frustration.

Performs statistical analysis Analyzes and calculates Ratio Study on residential sales data, assisting in Ratio Study process, determining and applying neighborhood and market factors, and calculating accurate real estate market values in delineated market areas.

Creates new neighborhood groupings, land values and related factors based on extensive market research on newly platted developments, or stratified existing subdivisions.

Investigates market and sales data with buyers, sellers, real estate brokers, property developers, bankers, appraisers, other County Assessors and additional professionals knowledgeable in real estate practices and activities.

Performs duties of Deputy-Real Estate Reassessment Property Specialist, reassessing non-movable property valuation on residential, commercial, industrial, and new construction.

Conducts research of legal documents to ensure correct platting of property descriptions, and property in use. Including deeds, surveys, resolutions, court orders, declarations, plats, covenants and restrictions, mortgages, leases and contracts.

Attends various meetings and continued education opportunities courses to maintain State required professional certifications.

Follows State legislative & Administrative code changes, as well as active Indiana Senate and House Bills and current tax court cases affecting property assessments, deductions, and taxes.

Represents the Assessor and in a customer service role by answering telephones/greeting customers in a welcoming and friendly manner, responding to inquiries, and directing callers/visitors to appropriate individual or department.

Mentors other officials from other governmental departments within and outside of Monroe County Government.

Performs related duties as assigned including overseeing, coordinating, and completing special projects.

## I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma or GED. Associates degree and/or related previous experience preferred.

Possession of and ability to maintain possession of State of Indiana Level 1, 2 and Level 3 Assessor/Appraiser certification.

Working Extensive knowledge of Indiana State property tax code, assessing principles as determined by the International Association of Assessing Officials, and techniques and ability to apply such knowledge to a variety of interrelated processes and tasks.

Ability to maintain current knowledge of applicable statutes and guidelines and adapt to changes in procedures accordingly.

Working knowledge Practical application of English grammar, spelling, and punctuation, and ability to use standard office equipment, including but not limited to computer, keyboard, copier, fax machine, telephone, postage meter and calculator.

Knowledge of departmental functions and office procedures and ability to properly maintain official department records and documents.

Ability to perform the statutory duties as prescribed for the County Assessor's Office as authorized by the Assessor and State of Indiana.

Working knowledge of land surveying techniques and legal procedures concerning local property and personal taxation, with ability to apply procedures and requirements to specific tasks.

Comprehensive application of software used in the Assessor's, Auditor's, Building, Planning, Recorder and Treasurer's offices.

Ability to supervise assigned staff, including interviewing candidates and making hiring recommendations, providing orientation and training staff, planning, delegating, and controlling work assignments, reviewing and approving work products and assignments, evaluating performance, maintaining discipline, and communicating and administering personnel programs and procedures.

Ability to effectively communicate orally and in writing with co-workers, other Monroe County departments, state and local agencies, contractors, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to apply knowledge of people and locations, plan/layout assigned work projects, and read/interpret detailed prints, sketches, specifications and maps.

Ability to compute/calculate, compile, collate, and coordinate data and make determinations based on data analysis.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to work alone with minimum supervision and with others in a team environment- often amidst frequent distractions and interruptions, and under pressure from formal schedules, deadlines, and high volume operations.

Ability to work on several tasks at the same time and work rapidly for long periods, often under time pressure, and sometimes at a moments notice with little time for completion.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally testify in legal proceedings/court as required.

Ability to occasionally work extended hours and travel out of town for training/conferences, sometimes overnight.

Possession of a valid Indiana driver's license and demonstrated safe driving record.

## II. <u>RESPONSIBILITY:</u>

Incumbent performs an array of interrelated and standard tasks according to the prescribed policies, practices and procedures of the department. Works independently of Assessor with authorization to make binding decisions in regard to assessments. Supervises all divisions within the Assessor's Office and aides in personnel duties, including disciplinary, correction and training, time management and office administration. Work product is not subject to supervisory review and errors in work may result in significant delays within the department and have major effects on functions and operations. Errors may also result in major inconvenience to other departments or agencies or members of the public.

## III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent contact with co-workers, other County departments, state and local agencies, contractors and the public, for the purposes of exchanging information, rendering service, supervising staff, and solving problems.

Incumbent maintains frequent contact with co-workers, other Monroe County departments, City of Bloomington Departments, Town of Ellettsville Departments, Department of Natural Resources (DNR), Indiana Department of Environmental Management (IDEM), and Department of Local Government Finance (DLGF), Indiana Legislative Services Agency (LSA), Economic Revitalization Committees, realtors, attorneys, tax representatives, appraisers, title companies, Nexus Group Contractors, software vendors, GIS vendors and the public for a variety of purposes, including explaining and interpreting departmental policy and ensuring proper accomplishment of duties.

Incumbent reports directly to Chief Deputy Assessor and/or County Assessor

## IV. PHYSICAL EFFORT AND WORKING ENVIRONMENT:

Incumbent performs duties in a standard office environment, in a vehicle, and in the field, including sitting and walking at will, sitting for long periods, lifting/carrying objects weighing up to 50 pounds, close/far vision, speaking clearly, hearing sounds/communication, and driving. Incumbent is exposed to normal hazards associated with driving a vehicle and working in the field, including exposure to inclement weather. Incumbent may be exposed to potentially irate/hostile individuals.

Incumbent occasionally works extended hours and travels out of town for training/conferences, sometimes overnight.

## APPLICANT/EMPLOYEE ACKNOWLEDGEMENT

The job description for the position of Reassessment Property Specialist Supervisor/Deputy for the Monroe County Assessor Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes <u>No</u>

Applicant/Employee signature

Date

Type or Print name

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

Type or Print name

Date 9/13/2023

## **Employee Job Questionnaire**

## COUNTY OF MONROE, INDIANA

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

| Position Title: | Property Director                    |  |
|-----------------|--------------------------------------|--|
| Department: [   | Monroe County Assessor's Office      |  |
| Employee Na     | <sup>me:</sup> Laura (Shelly) Jordan |  |

FLSA Status: O Exempt O Non-exempt

## • Purpose •

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- a department reorganization study
- a measure of how well you perform your duties

## • Instructions •

- 1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
- 2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
- 3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.

4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

## DO NOT DETACH THIS INSTRUCTION SHEET

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## Helpful Hints for Completing the Job Questionnaire

Please be aware that this project does <u>NOT</u> involve performance evaluations of individuals. We aren't collecting information about <u>how</u> you perform, only <u>what</u> you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner*, *Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a "snap shot" of the basic functions of a position – it is <u>not</u> a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands <u>the essential functions and the skills necessary to perform the job</u>.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

• You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, "Maintains statistics on computer for Indiana Department of Environmental Management (IDEM)."

• Also, **explain any terminology that may be unique to your department**, such as report names and form numbers. For example, "*Complete XQ325 forms*" may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, "*Complete payment assistance application forms*."

• Are machines, equipment, or special tools involved in accomplishing tasks? For example, "*Post payments*" could involve a computer or writing in manual ledgers, and "*Update maps*" could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

## Section I **Essential Functions of Position**

1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

Overseeing property valuation on agricultural, residential, commercial, industrial, and new construction & supervises staff.

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

## If Duties Section of your existing job description is accurate please note "see existing description' and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

|                                                                     | Essentiality                                                                                   | Frequency                                               |
|---------------------------------------------------------------------|------------------------------------------------------------------------------------------------|---------------------------------------------------------|
| Supervise subordinate personnel                                     | <u></u>                                                                                        | G                                                       |
| <b>ESSENTIALITY</b>                                                 | <b>FREQUENCY</b>                                                                               |                                                         |
| A= Marginal function of the job<br>B= Essential function of the job | C= Perform annua<br>D= Perform quart<br>E= Perform mont<br>F= Perform week<br>G= Perform on re | erly at a minimum<br>hly at a minimum<br>y at a minimum |

### **List Primary Duties:** Essen Freq 1. Oversees all aspects of the property division & supervises assigned personnel, including communicating and administering personnel policies & procedures, providing instruction/technical assistance in customer service, computer & software usage, maintains discipline.

2. Manages the updating and maintenance of all land and improvement records, various property transactions, and develops and implements procedural guidelines, including the internal control team, reviewing and recommending changes to department operations.

| В        | G |
|----------|---|
| <b>–</b> |   |

G

- 3. Facilitates in the updating and maintenance of all County plat books, GIS system attributes, geo- mapping of County plat information from survey documents, various property transactions, and develops and implements procedural guidelines.
- 4. Creates and directs county-wide ongoing reassessment for new construction and existing property, including measuring and collecting data, inputting permits, administering quality control, and ensuring the value on parcels are accurate. In constant collaboration with Nexus Group
- 5. Researches, analyzes, and interprets residential property data, using field data, building permits and blueprints to develop assessments for new construction. Uses CAD based assessment software to sketch building outlines and create property information and make necessary updates
- 6. Processes building and occupancy permits from Monroe County and Ellettsville Building Department. Tracks new construction building and occupancy permits for taxation purposes and closely monitors inspector data for property completion.
- 7. Investigates market and sales data with buyers, sellers, real estate brokers, property developers, bankers, appraisers, other County Assessors and additional professionals knowledgeable in real estate practices and activities.
- 8. Prepares reports monthly and annually and performs check and balances prior to submitting reports to State as required. To maintain accurate records and discover potential improvements to procedures, quality control, time management,
- 9. Creates new neighborhood groupings, land values and related factors based on extensive market research on newly platted developments, or stratified existing subdivisions.









E

В

- 10. Analyzes and calculates Ratio Study on residential sales data, assisting in Ratio Study process, determining and applying neighborhood and market factors, and calculating accurate real estate market values in delineated market areas.
- 11. Provides Auditor all valuation changes, and explanations for parcels within Taxing Increment Finance (TIF) Districts. Maintain all new construction and valuation changes within TIF related parcels within assessment system.
- 12. Generates & transmits annual data extractions to Dept of Local Government Finance, Legislative Services Agency, and other County departments by the deadline on the State Assessment Calendar. Corresponds with DLGF & researches, corrects, & resubmits data not deemed compliant.
- 13. Interprets abatement resolutions from the governing bodies of the County, and other local governments. Corresponds closely with the representatives of the governing bodies, other departments, tax reps, taxpayers, and attorneys on procedures, required forms and deadlines.
- 14. Determines the base rate of any existing improvements. Receives, analyses, and stores all documentation related to abatement. Assesses new construction of abated property and calculates the difference to determine Abatable value for Auditor. Verifies abatement percentage.

## Section II

## Job Requirements/Training/Certification

1. Check level of formal education that is <u>required</u> for your position. When specifying college degrees, please identify acceptable fields of study.

| High school diploma/GED Associa                                 | ate Degree 🛛 Baccalaureate I                           | Degree Masters Deg | ree |
|-----------------------------------------------------------------|--------------------------------------------------------|--------------------|-----|
| Other (Please describe):                                        |                                                        |                    |     |
| Acceptable fields of study:                                     | ·                                                      |                    |     |
| 2. Specialized training, certification, and Public Accountant). |                                                        |                    |     |
| State of Indiana Level 3 Indiana Asses                          | ssor/Appraiser Certification o maintain certification. |                    |     |

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| B | D |
|---|---|
|---|---|



3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

Assessing, Training others,

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

Indiana Code, and Indiana Administrative code, memos newsletters from DLGF, DLGF Assessment Manual, IAAO newsletters, IAAO texts

| 5. J | Does your | position rec | uire that y | ou have a | a valid drive | er's license? | Yes | O No If yes | , for which | duties? |
|------|-----------|--------------|-------------|-----------|---------------|---------------|-----|-------------|-------------|---------|
|------|-----------|--------------|-------------|-----------|---------------|---------------|-----|-------------|-------------|---------|

Site visits, confererence/ training attendance

6. Does your position require you to be at least 21 years of age? O Yes O No

### 7. Does your position <u>require</u> passage of a:

| Medical exam?       | OYes  | ONo             |
|---------------------|-------|-----------------|
| Drug test?          | ●Yes  | O No            |
| Psychological exam? | OYes  | O <sub>No</sub> |
| Written exam?       | • Yes | ONo             |

Other tests: Level I, II and III certification within 4 yr of hire date

### 8. Check and list equipment you operate as a regular part of performing your duties:

| Computer Typew          | riter 🔽 Calculator | Transcriber/dictaphone | Vehicle |  |
|-------------------------|--------------------|------------------------|---------|--|
| Other (Please describe) |                    |                        |         |  |

# 9. Your fundamental job duties may involve some relationship between you and <u>data</u> (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that <u>most accurately</u> describe your involvement with data.

Compare or observe similarities and differences between data, people, or things.

- Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing operating budget, determining charges.
- Compile, collate, or classify data.
- Analyze, evaluate, observe, diagnose, investigate.
- Coordinate, place, make determinations, take action based on data analysis.
- Fabricate data to discover facts or develop concepts or interpretations.

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10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that <u>most accurately</u> apply to your job responsibilities.

- Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).
- File, post, mail materials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).
- Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).
- Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

## Section III Difficulty of Work/Responsibility

- 1. Which of the following phrases <u>best</u> describes the type of supervision you receive?
- **Immediate supervision.** Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- Assignments and objectives set jointly by immediate supervisor and myself. Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- Indirect or occasional supervision. Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- General supervision. Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- Administrative or advisory direction from a board or CEO. Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

## 2. Which of the following phrases <u>best</u> describes the criteria for which your work is reviewed? Work is reviewed <u>primarily</u> for...

| <ul> <li>Attainment of objectives</li> <li>Compliance with precedent</li> <li>Technical accuracy</li> </ul> | Compliance with Department policy | Compliance with legal         |                          |
|-------------------------------------------------------------------------------------------------------------|-----------------------------------|-------------------------------|--------------------------|
| Soundness of judgment                                                                                       | Other (please describe):          | n an the straight we have the | ana da serie de la serie |
| If you checked more than two,                                                                               | please provide explanation:       |                               |                          |
|                                                                                                             |                                   |                               |                          |

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## 3. Check one of the following statements that <u>most accurately</u> describes the judgment you use in performing fundamental job duties.

- O Decisions are always determined by specific instructions or existing, well established policies and procedures.
- On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- O Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- O Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please* explain and provide examples.

Gate keeper of data. Oversees all assessments within office, Must insure accuracy of data for taxation purposes.

### 5. What programs, persons and/or functions are directly affected by the decisions you make?

Relaying any issues or request to our assessment software vendor to improve our system. Any and all decisions I make directly impact taxpayers and revenue generated for the county.

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

Setting assessed values for all property types to include commercial, industrial, agricultural, and residential. The County Assessor, or if property is appealed then the Property Tax Assessment Board of Appeals can overrule the assessment.

## Section IV

## Personal Work Relationship/Supervisory

### 1. What is the name and position title of your immediate supervisor?

Supervisor: Judith A Sharp

Title: Monroe County Assessor

## 2. Complete A) and B) only if you supervise or direct the work of others:

### A) List names and position titles of employees you supervise or direct as a regular part of your duties.

Assistant Property Director Real Estate Reassessment Specialist GIS Assessment Deputy Market Data Analyst

| $\checkmark$ | Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.                                                                                                                                    |
|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7            | Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.                                                                                                                                                       |
| $\checkmark$ | Interview candidates for openings and make hiring recommendations.                                                                                                                                                                                                       |
| $\checkmark$ | Make hiring decisions.                                                                                                                                                                                                                                                   |
| V            | Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.                                                                                                                       |
|              | Plan, delegate and control work assignments and special projects to assigned staff.                                                                                                                                                                                      |
| $\checkmark$ | Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.                                                                                                                                                                |
| $\checkmark$ | Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.                                                                                                                                                                     |
| <b>√</b>     | Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.                                                                                                                     |
| <b>√</b>     | Evaluate the performance results of assigned staff. Discuss present and past performance with each person.<br>Keep supervisor informed of performance discussion results.                                                                                                |
|              | Review salaries of assigned staff and recommend changes when warranted.                                                                                                                                                                                                  |
| ✓            | Recommend personnel actions, such as promotions, transfers, demotions.                                                                                                                                                                                                   |
| ✓            | Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.                                                                                                                                 |
| 1            | Maintain discipline and recommend corrective action as warranted.                                                                                                                                                                                                        |
| ✓            | Communicate and administer personnel programs and procedures for my area in accordance with approved policies.                                                                                                                                                           |
| 3. I         | ist other departments, agencies, organizations, and others with whom you regularly communicate.                                                                                                                                                                          |
|              | Other county, city and town Departments, DNR, and Department of Local Government Finance<br>(DLGF), Economic Revitalization Committees, Realtors, attorneys, tax representatives,<br>appraisers, title companies, Nexus Group Contractors, software vendors, GIS vendors |
|              | Check which statements <u>most accurately</u> describe your contact with employees, customers, governmental cials, or the general public.                                                                                                                                |
| <b>√</b>     | <b>Cooperative Work Relationship:</b> Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.                                                                                                                 |
| <b>√</b>     | <b>Render Service:</b> Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.                                                                                                                         |
| √            | <b>Instruct:</b> Teach or present subject matter to others through explanation, demonstration and supervised practice.                                                                                                                                                   |
| √            | <b>Negotiate:</b> Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.                                                                                                 |

B) Check which statements most accurately describe your managerial/supervisory responsibilities.

Mentor: Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

## Section V

## **Physical Effort/Work Environment**

## 1. Which of the following best describes your primary working environment?

☐ Storeroom

Garage/shop

Laboratory

☐ Manufacturing setting

✓ Standard office

☐ Other (please describe):

Essentiality

Uvehicle

☐ Outdoors

If you checked more than one, please provide additional explanation.

## 2. Which of the following best describes your primary working conditions? ESSENTIALITY

N/A= Not Applicable to job A= Marginal requirement of job **B**= Essential requirement of job

## Essentiality

| В | work alone with minimum supervision                  | B work with others in a team environment     |
|---|------------------------------------------------------|----------------------------------------------|
| В | work under time pressure                             | B work rapidly for long periods              |
| В | work on several tasks at the same time               | B understand and carry out oral instructions |
| В | read/carry out simple written instructions           | B memorize and retain instructions           |
| В | apply knowledge of people, locations                 | B present findings in oral or written form   |
| В | plan and layout assigned work projects               | A testify in legal proceedings/court         |
| В | compute/calculate, such as interest                  |                                              |
| В | count, make simple arithmetic additions/subtractions |                                              |

в read/interpret detailed prints, sketches, layouts, specifications, maps

В prepare detailed reports, such as financial statements, sales activity, product feasibility

N/A plan and present public speaking presentations, fund raisers, special events

В sitting & walking at will

ΙA

standing/walking for long periods

sitting for long periods В walking on uneven terrain A

| Ā                                                                  | work in extreme hot or co                | ld temperatures                                                                                                                                            | Ā               | work i                                 | n wet/icy surroundings                                                       |         |
|--------------------------------------------------------------------|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|----------------------------------------|------------------------------------------------------------------------------|---------|
| N/A                                                                | respond to emergencies fr                | om off-duty status                                                                                                                                         | N/A             | work w                                 | vith or near chemicals (please                                               | : list) |
| N/A                                                                | work near fumes, odors, d                | ust, dirt (please describe)                                                                                                                                | Irate           | taxpaye                                |                                                                              |         |
| N/A                                                                | work in a noisy environme                | ent (describe noise source)                                                                                                                                |                 |                                        | an an an ann an Ann an Anna Anna.<br>An Anna Anna Anna Anna Anna Anna Anna A |         |
| N/A                                                                | work in confined areas (pl               | ease describe)                                                                                                                                             | ·               |                                        |                                                                              |         |
| N/A                                                                | wear protective clothing o               | r equipment (please describ                                                                                                                                | e)              |                                        |                                                                              |         |
| Ñ/A                                                                | work in high places, such                | as ladders, roofs, bucket tru                                                                                                                              | ck (pleas       | se describ                             | pe)                                                                          |         |
| A                                                                  | work with or exposed to v                | iolent/irate individuals (plea                                                                                                                             | ise descr       | ibe)                                   |                                                                              |         |
| N/A                                                                | respond to situations invol              | ving potential physical harr                                                                                                                               | n to self       | and othe                               | rs (please describe)                                                         |         |
| В                                                                  | lifting under 25 pounds                  | A lifting 25 to 50 por                                                                                                                                     | unds            | A                                      | lifting over 50 pounds                                                       |         |
| Ā                                                                  | pushing/pulling objects                  | B carrying objects                                                                                                                                         |                 | В                                      | crouching/kneeling                                                           |         |
| В                                                                  | bending at waist                         | B reaching                                                                                                                                                 |                 | Ā                                      | driving                                                                      |         |
| В                                                                  | close vision                             | B far vision                                                                                                                                               |                 | В                                      | color perception                                                             |         |
| В                                                                  | depth perception                         | B speaking clearly                                                                                                                                         |                 | В                                      | hearing sounds/communica                                                     | tion    |
| B                                                                  | handling/grasping objects                | B <sup>readed</sup> fingering objects (                                                                                                                    | picking,        | pinching                               | ;)                                                                           |         |
| 3. Lis                                                             | st the three most physical               | y demanding activities you                                                                                                                                 | u <u>regula</u> | <u>rly</u> perfo                       | orm in your job.                                                             |         |
| Sta                                                                | nding/Sitting for long periods           | ۵۵۵ میلاد که در پارلون کا در بین میرون و در بین میرون و در میرون و<br>۱۰ م م م م م م م م م م م م م م م م م م م |                 |                                        |                                                                              |         |
| Lon                                                                | g periods in front of a computer         | screen                                                                                                                                                     |                 |                                        |                                                                              |         |
| Lifti                                                              | ng heavy records or training boo         | yks                                                                                                                                                        |                 | ······································ |                                                                              |         |
| 4                                                                  |                                          |                                                                                                                                                            |                 | ¥                                      | .C i                                                                         |         |
|                                                                    |                                          | ally demanding activities y                                                                                                                                | ou <u>regu</u>  | <u>lariy</u> per                       | Torm in your job.                                                            |         |
| Dea                                                                | aling with difficult taxpayers           |                                                                                                                                                            |                 | ÷                                      |                                                                              |         |
| Stre                                                               | essful deadlines                         |                                                                                                                                                            |                 |                                        |                                                                              |         |
| Tec                                                                | hnical failures that delete my wo        | ork.                                                                                                                                                       |                 |                                        |                                                                              |         |
| 5. What is your normal work schedule (example, 8 a.m. 4 p.m. M-F)? |                                          |                                                                                                                                                            |                 |                                        |                                                                              |         |
| 8 a.m. to 4 p.m. M-F                                               |                                          |                                                                                                                                                            |                 |                                        |                                                                              |         |
| <u> </u>                                                           |                                          | Never                                                                                                                                                      | Regu            | larly C                                | lccasionally                                                                 |         |
|                                                                    | e you required to:<br>ork extended hours | 0                                                                                                                                                          | C               |                                        | <ul> <li>•</li> </ul>                                                        |         |

b. work weekends

Ο

۲

0

|                                                               | Never | Regularly | <b>Occasionally</b> |
|---------------------------------------------------------------|-------|-----------|---------------------|
| c. work evenings                                              | 0     | 0         | ۲                   |
| d. travel out of town, but not overnight<br>For what purpose? | 0     | 0         | ۲                   |
| Training                                                      |       |           |                     |
| c. travel out of town overnight<br>For what purpose?          | 0     | 0         | ۲                   |
| f. respond to emergencies on 24-hr basis                      |       | 0         | 0                   |
| g. on call on rotation basis                                  | ۲     | 0         | 0                   |

7. Provide any other examples/information which would be helpful in understanding the physical and= mental requirements of your job.

Producing high priority data to those who request it within an extremely short deadline.

8. Is your position politically appointed by a recognized Department Head or Elected Official according to= IC 36-2-16-4? Yes O No O

## Section VI

## Certifications

Employee: I certify that the above statements are an accurate and fair description of my position.

| Name (print or type) Laura M Jordan                      | Hire date 06-12-96  |
|----------------------------------------------------------|---------------------|
| Title Reassessment Property Specialist Supervisor/Deputy | Department Assessor |
| Signature                                                | Date                |

*Supervisor:* I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes  $\bigcirc$  No  $\bigcirc$ 

| Signature | ( whatto | ally- | Date | 9-15-23 |  |
|-----------|----------|-------|------|---------|--|
| A.C       |          |       |      |         |  |

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc. 118 South Franklin Street Muncie, IN 47305 Phone: (765) 286-5195 Fax: (765) 286-2824

## Waggoner • Irwin • Scheele

& Associates INC

## MEMORANDUM

**DATE:** October 23, 2023

TO: Kim Shell, County Council Administrator

FROM: Lori Seelen Senior Consultant

## SUBJECT: New Position Request – Health Department

As requested, Waggoner, Irwin, Scheele, and Associates (WIS) reviewed the following new position request for the Health Department.

## **Public Health Liaison**

This is a new position request. According to information from the department "due to Opting-in to Health First Indiana and new core service requirements, this position will fulfill the need core services not being met." A job description has been created and the position will be responsible for providing education and outreach. The position reports directly to the Administrator.

Job duties for the position include: Providing and promoting outreach on public health emergency and infectious disease education; tracking and analyzing public health information, public health threats, emergencies, and infectious disease reporting, monitoring active outbreak case numbers and submitting reports; Assisting clinics that serve the public and school populations; Assisting with public health emergency planning; Assisting community organizations and local schools with emergency response plans and ensuring compliance with infection control, communicable disease reporting, and all-hazard response to health to public health threat plans; Collaborating with Preparedness Coordinator, ensuring compliance with established mutual aid agreements with surrounding counties; Assisting and training public and private organizations in disaster response protocols; Assisting communities affected by natural disasters in finding relief funding, and assistance; Collaborating with community partners to ensure fatality prevention initiatives are implemented; Assisting Health Administration with developing equity-focused fatality prevention strategies addressing disparities in maternal and infant mortality: Assisting with overseeing and ensuring equitable access to vaccines and other medical countermeasures needed in an emergency; Serving as liaison between the Department and external agencies; and Assisting the Environmental Division with outreach and education on safe private well water quality and best practices.

Requirements for the position include: Baccalaureate Degree in related fields of public health, public policy, health science, or nursing, or EMT or LPN certification; and Possession of or ability to obtain and maintain CPR and Basic Life Support (BLS) certifications.

We have assessed this position respective of other positions in the PAT job category and factored the position using the Factor Evaluation System (FES) job classification point-factor guide charts for PAT positions.

**<u>Recommendation</u>**: We factored the position at 350 PAT factor points. Therefore, if the position is approved, it is recommended the position be classified at PAT B Non-exempt.

## **POSITION DESCRIPTION COUNTY OF MONROE, INDIANA**

POSITION:Public Health LiaisonDEPARTMENT:HealthWORK SCHEDULE:8:00 a.m. – 4:00 p.m., M-FJOB CATEGORY:PAT B (Professional, Administrative, Technological)

DATE WRITTEN: October 2023 DATE REVISED: STATUS: Full-time FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application proves or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Public Health Liaison for the Monroe County Health Department responsible for providing education and outreach.

## **DUTIES**:

Provides, and promotes, outreach on public health emergency and infectious disease education, including public education, school programs, health fairs, and media messaging, and submits reports.

Tracks and analyzes public health information, public health threats, emergencies, and infectious disease reports, and monitors active outbreak case numbers, and submits reports.

Assists clinics that serve the public and school populations.

Assists with public health emergency planning, including assisting with development of emergency and safety preparedness plans, coordinating, and preparing emergency protocols, responding to public health emergencies, and ensuring compliance with regulations.

Assists community organizations and local schools with emergency response plans and ensures compliance with infection control, communicable disease reporting, and all-hazard responses to health to public health threat plans.

Collaborates with Preparedness Coordinator, ensuring compliance with established mutual aid agreements with surrounding counties and participating in state-wide public health training programs and exercises.

May serve as media liaison.

Assists and trains public and private organizations in disaster response protocols. Assists communities affected by natural disasters in finding relief, funding, and assistance.

Collaborates with community partners to ensure fatality prevention initiatives are implemented in the local community. Assists Health Administration with developing equity-focused fatality prevention strategies addressing disparities in maternal and infant mortality.

Collects and compiles data for all department's programs and provides detailed reports.

Assists with overseeing and ensuring equitable access to vaccines and other medical countermeasures needed in an emergency.

May serve as point of contact and liaison between Incident Command Participants.

Serves as liaison between the Department and external agencies.

Assists the Environmental Division with outreach and education on safe private well water quality and best practices.

Performs related duties as assigned.

## I. JOB REQUIREMENTS:

Baccalaureate Degree in related fields of public health, public policy, health science, or nursing or EMT or LPN certifications.

Ability to meet all hiring and retention requirements, including passage of a drug test and background check.

Possession of or ability to obtain and maintain CPR and Basic Life Support (BLS) certifications.

Working knowledge of and ability to make practical applications of health emergencies, and infectious diseases.

Working knowledge of maternal and infant mortality disparities.

Working knowledge of equity-focused facility prevention strategies.

Working knowledge of basic computer skills including word processing, spreadsheet, email, and Department-specific software applications with ability to apply such knowledge to a variety of interrelated processes, tasks, and operations.

Working knowledge of standard English grammar, spelling, and punctuation and ability to prepare correspondence and written reports as required.

Ability to properly operate standard office equipment, including computer, telephone, calculator, and printer.

Ability to and knowledge of data collection and clinical care.

Ability to rationally and collected in emergency situations.

Ability to provide public access to or maintain confidentiality of Department information and records according to state requirements including HIPAA regulations.

Ability to comply with all employer and Department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to effectively communicate orally and in writing with co-workers, other County departments, various organizations, schools, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to compile, collate, and classify data.

Ability to work alone with minimum supervision and with others in a team environment, work on several tasks at the same time, and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written and oral instructions.

Ability to plan and present public speaking presentations.

Ability to plan and layout assigned work projects and apply knowledge of people and locations.

Ability to count, compute, and make arithmetic calculations.

Ability to read and interpret professional journals, infectious disease references, and emergency preparedness manuals.

Ability to testify in legal proceedings and court.

Ability to occasionally work extended hours, evenings, and weekends, and travel out of town for training, sometimes overnight, and occasionally respond to emergencies on 24- hour basis and on call an on rotation basis.

Possession of a valid driver's license with a demonstrated safe driving record.

## II. DIFFICULTY OF WORK:

Incumbent's assignments are guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations.

## III. <u>RESPONSIBILITY:</u>

Incumbent is responsible for proper completion of assigned tasks where desired results are clearly indicated. On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from supervisor. Work is reviewed primarily for adherence to instructions and guidelines, compliance with Department policy and legal requirements, technical accuracy, and attainment of goals and objectives.

## IV. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent communication with co-workers, other County departments, various organizations, schools, and the public, for the purposes of exchanging information, instruct, and rendering services.

Incumbent reports directly to Administrator.

## V. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs a variety of duties in a standard office environment including sitting/walking at will, sitting/standing/walking for long periods, lifting/carrying objects weighing over 50 pounds, bending/crouching/kneeling, reaching, pushing/pulling objects, walking on uneven terrain, may work in extreme temperatures, work near fumes, odors, dust, dirt, noisy environment, in confined areas, in high places, close/far vision color/depth perception, hearing sounds/communication, speaking clearly, keyboarding, driving, and handling/grasping/fingering objects. Incumbent may wear proactive clothing or equipment.

Incumbent is occasionally required to work extended hours, evenings, and weekends, and travel out of town for training, sometimes overnight, and occasionally required to respond to emergencies on 24-hour basis and on call an on rotation basis.

## APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Public Health Liaison for the Monroe County Health Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes\_\_\_\_ No\_\_\_\_

Applicant/Employee signature

Date

Type or Print name

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

Type or Print name

## PERSONNEL ADMINISTRATION COMMITTEE

## Agenda Request Form

Complete <u>ALL</u> applicable highlighted areas below.

| DEPARTMENT:             | Health                                    | MEETING DATE RE        | QUESTED (Tentat | tive) : 11/7/2023 |
|-------------------------|-------------------------------------------|------------------------|-----------------|-------------------|
| <b>Request Presente</b> | r(s): Lori Kelley                         |                        | Phone:          |                   |
| Was the Council L       | iaison notified prior to submitting       | this Agenda Request: N | 10              |                   |
| FUND INFORMAT           | ION: (Mark with an "X" in all appl        | icable boxes)          |                 |                   |
| Fund Name:              | Health Fund                               |                        |                 |                   |
| Fund Numbe              | r: <mark>1159 Locat</mark>                | ion Number: 0000       |                 |                   |
| PURPOSE OF REQ          | <b>UEST:</b> (Mark with an "X" in all app | licable boxes)         |                 |                   |
| Creation                | of New Position Title:                    |                        |                 |                   |
| Amend 0                 | Current Position Description T            | itle: See below        |                 |                   |
| Hours:                  | PT Classification:                        | PART-TIME              | L               | evel: E           |
| Other (S                | pecify)                                   |                        |                 |                   |

Narrative: Give a **DETAILED SUMMARY** explanation for the request (purpose, action needed, etc.).

The department is requesting a review and reclassification of five positions: Administrative Assistant, Assistant Registrar, Financial Manager, Health Administrator, and Health Registrar. This is due to a restructuring in the administrative and Vital Records departments to ensure proper cross training.

Forward <u>entire</u> Request Form with all supporting documents to: <u>councilrequests@co.monroe.in.us</u>

#### **POSITION DESCRIPTION COUNTY OF MONROE, INDIANA**

| <b>POSITION:</b>     | Administrative Assistant                               |
|----------------------|--------------------------------------------------------|
| <b>DEPARTMENT:</b>   | Health                                                 |
| <b>DIVISION:</b>     | Administration                                         |
| WORK SCHEDULE:       | 8:00 a.m. – 4:00 p.m., M-F                             |
| <b>JOB CATEGORY:</b> | COMOT (Computer, Office Machine Operation, Technician) |

| DATE WRITTEN: June 2013                  | STATUS: Full-Time       |
|------------------------------------------|-------------------------|
| DATE REVISED: February 2021, August 2021 | FLSA STATUS: Non-exempt |

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Administrative Assistant to the Monroe County Health Department and is responsible for providing management and clerical support services to Administrative staff and office personnel as directed by the Administrator for special projects.

#### **DUTIES:**

Performs various clerical duties as directed by the Health Administrator. Assists the **Health** Administrator with the **summary of annual statics**/annual reports **training logs** and associated documents. **Submitting to Health Administrator for approval of completed document before submitting to printing agency for processing.** 

Maintains schedules and arranges meetings for Health Administrator, Health Officer, and Board of Health as appropriate directed. Monitors and forwards Health Department emails to the appropriate party. Assists the Health Administrator in daily operations, including monitoring of approaching board vacancies and alerts.

Prepares legal advertisements notices and meeting notices for Health Board and other public meetings in accordance with State law and collaboration with County Legal. Prepares meeting agenda and packets at the direction of the Health Administrator, Health Officer, and/or Board of Health President for approval and provides agenda/packet to Board Members prior to scheduled meeting. Drafts Board of Health meeting minutes for approval and publishes as directed.

Prepares correspondence, department meeting agendas and packets, and minutes and provides to Health Administrator for review prior to distribution to departmental staff.

Assists with releases for distribution, ordinances, contracts, and resolutions for distribution to news media, State agencies, County departments, and for Commissioners' public meetings.

**Manages the conference room schedule.** Monitors use of Conference Room and instructs users regarding proper use, communicates with Technical Services regarding requirements for meetings in conference room, coordinating with Health Administrator in maintaining and managing detailed, long range schedule for use of conference room.

Collects service statics for work performed from each Health Department section to generate a monthly report. Forwards completed report to the Health Administrator for review.

Supervises and directs interns, including providing training/instruction regarding tasks and standard office procedures, evaluating performance, and guiding the selection of future interns.

**Forwards complaints received either in Receives complaints in** writing and/or by telephone to appropriate section. , responding to questions, addressing problems, and directing inquiries to appropriate section.

Assists with supervising interns, including providing training/instruction regarding tasks and standard office procedures, evaluating performance, and guiding the selection of future interns.

Assists with receiving student internship/externship applications, forwarding for review to the appropriate parties. Assists with filing new internship/externship documentation and general onboarding procedures. Assists with preparing intern/extern work plans for department needs as directed by Health Administrator.

**Proofreads and makes suggest edits to work product of the Edits and proofreads written work of the** administrative staff **as requested**.

Assists Vital Records with receiving and opening , and recording incoming office mail, fax transmissions, email, and other correspondence to the Administrator. for the department. Provides customer service Serves as back up to Vital Records division as directed.

Assists Health Administrator in preparation of budgets to the Health Board, the County Council, or other appropriate entities, including financial reports.

Maintains, exercise care and custody of and updates official records, documents, and files relating to official actions and activities of the Health Department under the direction of the Health Administrator. Maintains departmental records in accordance with local, state and federal retention policies.

Evaluates filing procedures and makes recommendations for changes to the procedure to the Health Administrator. improvements as needed to meet changing circumstances.

Serves as a backup, in absence of, Financial Manager with preparing grant invoices for reimbursement, ledger management, and preparing internal financial reports as directed by the Health Administrator.

**Coordinates and manages website and social media posts.** Maintains Health Department sponsored web pages and social media accounts, updating pages with upcoming meetings, providing weblinks for meetings, and ensuring information is accurate and accessible.

Performs related duties as assigned.

#### I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma or GED at minimum. Previous related office and financial experience preferred.

Ability to complete all departmental hiring requirements, including passage of a drug test.

Thorough knowledge of standard office procedures and ability to apply such knowledge to a variety of interrelated tasks, processes, and operations.

Knowledge of County government fiscal structures, legal organization, public processes, and the 10 Essential Services of Understanding Public Health.

Knowledge of the role of each branch of County government.

Working knowledge of prescribed filing regulations, and ability to create and maintain accurate files and records.

Working knowledge of basic computer applications and ability to use computer software programs used by the Commissioners' Office, including Word, Excel, Outlook, and the Internet.

Working knowledge of standard English grammar, punctuation, and spelling and ability to compose, edit, and prepare correspondence and prepare detailed written reports as required.

Ability to effectively communicate in a courteous, tactful, and professional manner with co-workers, other County departments, local, state, and federal officials, and members of the general public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to operate standard office equipment, including computer, calculator, fax machine, postage meter, copier, and multi-line telephone.

## Ability to supervise and direct interns, including providing training/instruction regarding tasks and standard office procedures, evaluating performance, and guiding the selection of future interns.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to compare or observe similarities and differences between data, people, or things.

Ability to compile, collate, analyze, and evaluate data.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under deadlines.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally work extended hours and evenings and travel out of town for seminars and conferences, but not overnight.

#### II. <u>RESPONSIBILITY:</u>

Incumbent performs duties according to a formal schedule with priorities primarily determined by supervisor, service needs of the public, and seasonal deadlines. Incumbent exercises independent judgment in applying general policies and procedures in unique situations, often under conditions of uncertainty and conflict. Errors in work are primarily detected or prevented through supervisory review and/or procedural safeguards. Undetected errors could result in work delays for other County departments or officials, public embarrassment, and/or waste of County funds/materials.

#### III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent contact with co-workers, other County departments, local, state, and federal officials, and members of the general public for the purpose of explanation, interpretation, technical assistance, and non-routine problem-solving requiring coordination of varied activities.

Incumbent reports directly to the Health Administrator.

#### IV. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in standard office, involving sitting for long periods, sitting/walking at will, lifting/carrying objects weighing under 25 pounds, keyboarding, hearing communication, and speaking clearly.

Incumbent is occasionally required to work extended hours and evenings and travel out of town for seminars and conferences, but not overnight.

#### APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Administrative Assistant for the Monroe County Health Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes\_\_\_\_ No\_\_\_\_

Applicant/Employee signature

Date

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

#### **POSITION DESCRIPTION COUNTY OF MONROE, INDIANA**

| <b>POSITION:</b>     | Assistant Registrar                                    |
|----------------------|--------------------------------------------------------|
| <b>DEPARTMENT:</b>   | Health                                                 |
| <b>DIVISION:</b>     | Vital Records                                          |
| WORK SCHEDULE:       | As Assigned                                            |
| <b>JOB CATEGORY:</b> | COMOT (Computer, Office Machine Operation, Technician) |

#### DATE WRITTEN: July 2013 DATE REVISED: February 2021

STATUS: Full-Time FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application proves or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Assistant Registrar for the Monroe County Health Department, responsible for assisting the Registrar with collecting, filing, preserving, and certifying of vital records for Monroe County.

#### **DUTIES:**

Issues certified birth and death certificates as requested, including assisting individuals with completing applications, printing certificates, making and certifying copies, and collecting and receipting payments as directed. Receives and fulfills public records requests for birth and death certificates.

Assists funeral homes and/or families with processing death records as needed, including verifying accuracy of forms, filing, and preparing records for filing with Indiana Department of Health (IDOH). Affirms, registers, logs, and files daily death records. Supplies, logs, and tracks Burial Transit Permits and maintains records. Completes and submits monthly county death, substance abuse, and suicide reports. Copies and submits monthly coroner cases, minor deaths, and fetal death reports. Cross-references and logs out of county death reports. Marks birth records as deceased when appropriate. Prepares and submits death statistics for annual report. Prepares indexing accordingly.

Assists with processing new birth records with Indiana Department of Health (IDOH), including receiving birth notifications from the hospital, reviewing physician verifications, mailing, and processing birth record verifications to/from parents. Registers home births, including assisting parents with completing the home birth forms. Prepares amendments to birth records and responds to court orders for record changes as needed. Updates birth record index accordingly.

# Works with personnel from Social Security, U.S. Military, FBI, and a variety of other country and local government departments, social agencies, and professionals to request and/or provide birth/death verifications and related information.

Prepares and files paternity affidavits. Answers inquiries regarding birth records registration. Composes and enters data amendments to birth records and responds to court orders for birth record changes as needed, forwarding appropriate forms to IDOH as required.

Receives applications for food licenses, real estate, septic system, pool, trash hauler, campgrounds, and other permits. Collects and receipts fees for all permits and birth/death certificates and files documents accordingly. Totals and balances daily receipts and prepares bank deposits as directed in Registrar's absence.

Sorts and distributes daily mail. Answers telephone and receives office visitors, taking messages, directing callers to appropriate persons or department, and responding to inquires as appropriate, including explaining procedures, interpreting ordinances and regulations, providing international travel information, and tracing genealogical records. Notarizes documents as requested.

Composes and types a variety of letters, memos, reports, and other correspondence as directed by Supervisor and other department personnel. Assists with proper retrieval and filing of department records and maintains filing systems accordingly.

Works with personnel from Social Security, U.S. Military, FBI, and a variety of other country and local government departments, social agencies, and professionals to request and/or provide birth/death verifications and related information.

Ensures proper inventory of department forms and supplies and completes and forwards purchase orders/claims to Auditor as directed.

Assists Registrar with monitoring and replenishing departmental forms and supplies.

Assists Financial Manager Assumes responsibilities of the Registrar as backup to the Financial Manager in the absence of the Registrar, including but not limited to preparing and submitting accounts payable claims and/or bi-weekly departmental payroll to the Health Administrator and Health Officer for review, then documentation to Auditor's Office for processing. Maintains department payroll records and ledgers. Ensures appropriate funding sources for payroll, reconciles department ledger totals and submits to Health Administrator for review and approval. in preparing vendor claims and payroll claims, including completing the appropriate claim forms, calculating longevity, issuing purchase orders, typing, sorting, filing copies, and forwarding claims/invoices to Auditor as directed. Maintains documentation of department budget transactions as directed by the Administrator.

Serves as backup to Administrative Assistant with issuing public meeting notices, preparing board of health meeting agenda and packet, and issuing public health department notices, as directed by Health Administrator.

Attends education workshops and training seminars as required. Periodically assists with training of department personnel.

Oversees start-of-day opening and end-of-day closure, ensuring balances for all receipts with applications are accurate and locking up certified paper cash/checks and record vault in absence of Registrar.

Assists in completing accreditation processes and quality improvement projects as assigned.

Performs related duties as assigned.

#### I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma or GED. Associate Degree with previous related experience preferred.

Possession of and ability to retain possession of Indiana Notary Public License.

Possession of and ability to obtain and retain Indiana Vital Records Association (IVRA) certifications for issuing birth/death records, records retention, and preservation.

Working knowledge of and ability to make practical application of state and local rules and regulations and procedures regarding vital records, including receiving, processing, filing, certifying, releasing, and reporting information.

Working knowledge of basic bookkeeping, with ability to properly collect and receipt payments, total and balance daily receipts, and prepare bank deposits and reports as directed.

Working knowledge of standard English grammar, spelling, and punctuation with ability to type with speed and accuracy and use standard office equipment, including department computer software, computer, calculator, printer, postage meter, vehicle, keyboard, telephone, copier, laminator, paper cutter, and fax machine.

Ability to effectively communicate orally and in writing with co-workers, other county departments, funeral directors, various state and federal agencies, IDOH, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to provide public access to or maintain confidentiality of department information and records according to state and federal requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in written form.

Ability to occasionally work extended hours and travel out of town for training and conferences, sometimes overnight.

Ability to respond swiftly and rationally to emergencies on a 24-hour basis.

Possession of a valid Indiana driver's license and demonstrated safe driving record.

#### II. <u>RESPONSIBILITY:</u>

Incumbent performs a variety of bookkeeping, reception, and clerical duties according to a flexibly, customary routine with priorities determined by supervisor and service needs of the public. Errors are prevented through legally defined procedures and are detected by standard bookkeeping checks and/or notification from other departments, agencies, or the public. Undetected errors may result in loss of time to correct error, work delays in other departments/agencies, and/or inconvenience to other agencies or the public.

#### III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains frequent contact with co-workers, other county departments, funeral directors, various state and federal agencies, IDOH, and the public for the purposes of exchanging information and explaining policies and procedures.

Incumbent reports directly to Registrar.

#### IV. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in standard office environment, including sitting/walking at will, lifting/carrying objects weighing under 25 pounds, bending, reaching, keyboarding, close/far vision, crouching/kneeling, speaking clearly, hearing sounds/communication, and handling grasping objects.

Incumbent occasionally works extended hours, travels out of town for training and conferences, sometimes overnight, and responds to emergencies on a 24-hour basis.

#### APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Assistant Registrar for the Monroe County Health Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes \_\_\_\_\_ No \_\_\_\_\_

Applicant/Employee signature

Date

Type or Print name

 $\diamond$ 

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

#### **POSITION DESCRIPTION COUNTY OF MONROE, INDIANA**

| <b>POSITION:</b>     | Financial Manager                                 |
|----------------------|---------------------------------------------------|
| <b>DEPARTMENT:</b>   | Health                                            |
| <b>DIVISION:</b>     | Administration                                    |
| WORK SCHEDULE:       | As Assigned                                       |
| <b>JOB CATEGORY:</b> | PAT (Professional, Administrative, Technological) |

DATE WRITTEN: February 2021 DATE REVISED: STATUS: Full-time FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skills, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application proves or perform essential functions of the job, unless the accommodation would present an undue hardship.

Incumbent serves as Financial Manager for the Monroe County Health Department, responsible for performing financial duties of department, and assisting with reviewing completed employee onboarding new hire documentation, and supervising assigned staff and interns.

#### **DUTIES**:

Establishes accounting structures to gather new data and meet changing conditions. Prepares, analyzes and reports all Health Department budgets, including monitoring and recording expenditures, analyzing trends and identifying system dysfunctions, and recommending procedural efficiency as appropriate.

Creates projected annual budgets, including budget for annual budget hearings, reviewing with Supervisor and making adjustments.

Attends **County Council meetings**, budget <del>work</del> sessions and budget hearings as <del>needed</del> directed by the Health Administrator</del>, providing information and necessary documentation.

Prepares all requests for County Council and Commissioners meetings, provides supporting documentation, and attending meetings to answer questions regarding requests as required forwards to the Health Administrator for approval.

Prepares and submits <del>purchase orders/</del>accounts payable claims to the Health Administrator and Health Officer for review, then provides documentation to Auditor's Office for processing. <del>as required.</del> Tracks accounts payable checks accordingly.

## Prepares Worker's Compensation Claims and FMLA Claims for the Health Department employees. Submits completed forms to the Health Administrator for approval.

Obtains price quotes and prepares/submits purchase requests to appropriate agency, department, or Board as **necessary** as directed. Creates, maintains and updates vendor files, including account lines and annual appropriations for all funds, including grant funds. Communicating with vendors regarding purchases, deliveries, and payments. Balances and reconciles **all** accounts, **including grant funds**, with Auditor's records. **and R**ecommends line-item transfers as needed **to the Health Administrator** to maintain positive account balances. **Maintains accounts payable database system, tracking vendor accounts and creating new accounts as needed and updating with new line numbers and annual appropriations for both county funds and grant funds.** 

Creates, maintains, and monitors department ledgers and cash balances, providing fiscal projections and recommendations to Section Leads the Health Administrator for fee increases and/or expenditure constraints and determining appropriate and effective allocation of funds, assuring integrity within individual funds.

Prepares and presents oral or written management and budgetary reports, such as transfers, additional appropriations, and changes in salary ordinance to **the** Health Administrator **as directed**. **and other parties as requested**.

**Researches new grant opportunities.** Assists in creating and writing departmental grants as directed. Oversees the compliance of all departmental grants.

Monitors grant budgets including monitoring grant expenditures against budgets, preparing/processing grant claims for reimbursement and submitting upon Supervisor's for Health Administrator's approval. Assists in administering grants and funding contracts according to funding source requirements, Creates/maintains creating/maintaining databases and departmental grant spreadsheets, and compiles all necessary grant data. preparing.

**Completes periodic financial reporting to fulfill requirements of grant** and submits **financial** reports **to Health Administrator and granting agency as directed**. **and** Assists Auditor as needed with departmental grants.

Prepares bi-weekly departmental payroll and provides to Health Administrator for review. and Maintains department payroll records and ledgers. and prepares payroll, including recording and/or ealculating hours and days worked, pay, leave, compensatory time, and related information, Ensures appropriate funding sources for payroll, reconciles department ledger totals to Auditor's reports and submits to Health Administrator for review and approval.

Maintains payroll records of work-study employees, submitting as required.

Conducts random financial reviews of deposits and bank statements as directed by the Health Administrator to ensure accuracy. Prepares and submits monthly Report of Collections to the Health Administrator as directed. Collaborates with the Registrar, as needed, to correct any discrepancies in the monthly Report of Collections. required.

Prepares and submits financial reports and financial statements, including documentation and preparation for Annual Report and State Board of Accounts Audit as required, ensuring compliance with Federal, State and Local legal and regulatory requirements.

**Conducts fiscal and management research and compiles data for comparative analysis, including departmental cost analysis.** Completes a variety of periodic reports as required or requested by County officials and funding/licensing agencies, including conducting assessments and compiling statistics, financial information, and narratives. Periodically creates forecasts and budget summary reports for

#### Supervisor the Health Administrator and/or Auditor's Office as needed.

Prepares and submits any necessary travel requests to Supervisor.

Advertises open positions to various media sources, collecting applicant resumes/applications, preparing for the interviewing of applicants, ensuring required reference checks, educational documentation, background screenings, pre-employment physicals, pre-employment drug screenings, and other required pre-employment activities are completed prior to offering formal offer of employment. Communicates results of screening to Supervisor.

Directs assigned personnel and interns, including interviewing and making hiring recommendations, administering Phase One of new employee orientation, preparing timesheets, reviewing position responsibilities and salaries, administering personnel programs and procedures, updating staff of organizational developments, orienting new interns, assigning duties to interns, evaluating intern performance, and providing training.

In collaboration with Health Administrator, assures department compliance with all accrediting and licensing requirements in relation to personnel charts and training needs of Health Department staff.

Maintains and updates personnel files, electronic Employee Service Records, and employee records, such as tax withholding information, W-9, I-9, status change forms, new hire/termination paperwork, time slips, requests for days off, evaluations, employment verifications, and other related information, tracking and reporting longevity payments and salary step increases, submits to Health Administrator for approval and upon approval submits to the Payroll Administrator., and submitting to Auditor's Office as required or requested.

Assist the Registrar with the maintenance of, and audits quarterly the inventory of the Health Departments capital assets including assets obtained thourgh grant funds. Manages and maintains Health Department equipment asset inventory and related files, such as vendors, repair services, and maintenance contracts, assuring equipment repairs are complete.

**Collects,** prepares and submits medical billing for the department per reimbursement guidelines **including but not limited to <del>such as</del>** administration fee for immunizations, lead risk assessments, **and** lead case management, **and**/or reproductive health care services.

**Reviews Health Department policies and procedures regarding financial management and recommends changes/updates to the Supervisor.** 

Serves on Department and/or County committees and attends a variety of meetings, seminars, and professional development workshops, as required including serving as member of Accreditation team, monthly section lead and staff meetings.

Performs related duties as assigned.

#### I. JOB REQUIREMENTS:

Baccalaureate Degree in accounting, office/business administration, management, or related field or equivalent combination of education and experience.

## Practical knowledge of grant funding and management and/or ability to obtain Grant Management training and/or certification.

Thorough knowledge of standard bookkeeping principles and fund accounting, with ability to accurately maintain and reconcile ledgers and other records, and complete related financial reports and payroll records as required.

Thorough knowledge of standard office practices and procedures and ability to apply such knowledge to a variety of interrelated processes, tasks and operations.

Knowledge of and ability to operate a variety of computer software and equipment used by the department, including printer, telephone, calculator/adding machine, fax machine, copier, and postage meter, accounting, database and spreadsheets, and the ability to design and maintain data for reporting to several State and Federal agencies in order to be in compliance with their regulations.

# Ability to supervise and direct assigned staff and interns, including interviewing and making hiring recommendations, making work assignments, providing training and corrective instruction, evaluating performance, and maintaining knowledge of duties performed by supervisory personnel.

Working knowledge of Standard English grammar, spelling and punctuation, ability to prepare correspondence, documents and written reports as required, and ability to maintain complete, accurate accounting records and prepare detailed written reports and financial statements as required.

Ability to effectively communicate orally and in writing with co-workers, other County personnel, other government departments/agencies, vendors, and the public, including being sensitive to professional ethics, gender, cultural diversities and disabilities.

Ability to understand, memorize, retain, and carry out written or oral instructions. Ability to compile, analyze and evaluate data, make determinations, and present findings in oral or written form.

Ability to compute/perform arithmetic operations, such as developing budgets, calculating payroll, and monitoring all revenue and expenditures.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time, work rapidly for long periods, work under pressure of formal deadlines, work through interruptions, detect errors, and adapt to changing priorities.

Ability to occasionally work extended evening and/or weekend hours, and occasionally travel out of

#### II. <u>DIFFICULTY OF WORK</u>:

Incumbent performs a variety of regular and routine duties with priorities determined by a flexible, customary routine and Supervisor. Assignments are guided by broad policies and/or general objectives. Errors in work are primarily detected or prevented through Supervisor review and notification from other agencies, and standard bookkeeping checks. Undetected errors could result in loss of time for correction, inconvenience to other agencies, or loss of money. Work is reviewed during critical phases and upon completion for accuracy and compliance with funding source regulations.

#### III. <u>RESPONSIBILITY</u>:

Incumbent is responsible for proper completion of assigned tasks where desired results are clearly indicated. Incumbent exercises independent judgment in a variety of situations and circumstances, using departmental policies for guidance. Unusual problems or situations are discussed with supervisor, and work product is periodically reviewed for soundness of judgment and conclusions and overall adherence with departmental policies.

#### IV. <u>PERSONAL WORK RELATIONSHIPS</u>:

Incumbent maintains frequent communication with co-workers, other County personnel, other government departments/agencies, vendors, and the public for purposes of supervising and coordinating work, resolving problems and requesting and/or providing information.

Incumbent reports directly to the Health Administrator.

#### V. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in standard office environment, involving sitting/walking at will, sitting/standing/walking for long periods, lifting/carrying objects weighing up to 25 pounds, bending/crouching/kneeling, pushing/pulling objects, keyboarding, close/far vision, depth/color perception, speaking clearly, hearing sounds/communication, reaching, and handling/grasping/fingering objects. Incumbent occasionally works extended evening and/or weekend hours, and occasionally travels out of town for meetings/conferences, sometimes overnight.

#### APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Financial Manager for the Monroe County Health Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes\_\_\_\_\_ No\_\_\_\_\_

Applicant/Employee signature

Date

Type or Print name

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

#### POSITION DESCRIPTION COUNTY OF MONROE, INDIANA

POSITION:Health AdministratorDEPARTMENT:HealthDIVISION:AdministrationWORK SCHEDULE:As AssignedJOB CATEGORY:EXE (Executive)

#### DATE WRITTEN: January 2007 DATE REVISED: February 2021

#### STATUS: Full-time FLSA STATUS: Exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application process or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Health Administrator for the Monroe County Health Department, responsible for supervising Health Department personnel, maintaining and directing daily operations, and recommending and administering policies/programs on approval of Health Officer and Board.

#### **DUTIES:**

Administers department activities to effectively and efficiently provide Monroe County citizens with public health services in accordance with professionally recognized standards/practices.

Develops and implements programs and plans consistent with the Health Department strategic goals and objectives as approved by the Board of Health. Ensures strategic goals align with the accreditation process. Collaborates with local, state, and federal services to maximize programs/services including identifying programs that can be funded and sustained over time.

Performs and facilitates all employee human relations functions including overseeing the hiring process including but not limited to, advertising vacancies, conducting pre-employment screenings, and making hiring recommendations.

Supervises Directs and oversees the daily operations of department personnel, including interns/externs as necessary, interviewing candidates and making hiring recommendations to Health Officer, providing and tracking initial orientation/training, ensuring new hire documents are completed, tracking and delegating work assignment and reassigning staff as necessary to continue the essential functions of the department. Approves vacations, absences, and travel requests for department personnel. providing training, making work assignments, monitoring and reviewing daily work, evaluating performance, and providing corrective instruction.

Develops and implements Immersive Public Health Externship programming within the Health Department, utilizing Indiana Department of Health and Indiana University School of Medicine guidelines. Generates reports and documentation for this program as directed. Conducts work performance evaluations including the formation of individual development plans and provides corrective instruction in consideration and compliance with department's strategic plan.

Reviews departmental job descriptions and responsibilities, departmental organizational charts and makes recommendations to Health Officer and Board of Health for changes to ensure the efficiency of operations. Submits approved changes to respective County governmental body/committee for final consideration.

Conducts regular meetings with staff to review department operations and share professional information as appropriate.

Represents department to the public, including responding to complaints and inquiries, attending meetings and conferences with Indiana Department of Health (IDOH) other government/County agencies, and coordinating and/or resolving problems with services, responding to assistance needs, and providing information upon request.

Releases to the public information statements regarding major health threats upon Health Officer approval. Works with external stakeholders on public health matters.

Stays up-to-date of relevant health issues in the state and county, reporting findings, offering recommendations, and disseminating via various avenues.

**Coordinates with County Legal to m**onitor changes in laws, legal requirements, and services in other department/agencies affecting Health Department operations.

Works with **the** Health Officer **and Board of Health** to effectively assess operations and develop, revise, and implement new policies, procedures, and/or ordinances accordingly.

**Collaborates with the Financial Manager in Assists Health Officer in** preparing annual **county** department**al** budgets **and grant budgets** and presents to **the Health Officer and Board of** Health **Board and County officials** for approval. **Presents approved budget requests to the County Council for final review and approval and responds** to inquiries as needed.

Prepares State budgets and any required documentation for review and approval of the Health Officer and Board of Health. Submits budgets and documentation to State agencies.

**Oversees approved budget for accuracy and compliance** <u>Administers budget upon approval</u>, including reviewing and approving all department accounts payable claims, Worker's Compensation Claims, FMLA Claims, line-item transfers, payroll, longevity payments, step-increases, and grant reimbursement invoices, expenditures.

Directs preparation of budgetary and fiscal reports/requests including additional appropriations and changes in salary ordinance. Present recommendations based on reports/requests to Board of Health and directs Financial Manager to submit approved changes for County Council consideration and approval.

Directs or coordinates with the Financial Manager and/or Registrar to obtain price quotes and vendor documentation. Approves all departmental purchase requests.

## Creates schedule for financial reviews of deposits and bank statements and ensures implementation of schedule by Financial Manager.

## Establishes and maintains Vendor relationships with regards to setting up business accounts for departmental use.

**Directs personnel to e**nsure proper maintenance and filing of all Department records, including **but not limited to** reviewing **Environmental** inspection/investigation **complaints**, **files**, developing resource files, and **supervising oversees** Registrar's vital records **are filed timely. files**.

#### Maintains and updates Department's personnel files, as needed.

**Collaborates with staff on preparing Prepares** a variety of monthly, quarterly, and annual reports **including grant funds**, as required by State Board of Health, County Health Board, and other government and regulating agencies.

Ensures department compliance with all requirements and obligations of County PCB Consent Decree, including conducting and analyzing field tests, investigating, recommending, and implementing effective solutions to PCB contamination, maintaining PCB resource information files, communication and negotiating with Environmental Protection Agency (EPA) officials, and compiling and submitting all reports and documents as required.

**Reviews fiscal projections and recommendation of Financial Manager regarding Investigates** funding/program opportunities, including user fees, service charges, corporate sponsorships, and grants. **Develops report with proposed changes to present to the Health Officer and/or Board of Health for approval. Implement approved changes as directed.** 

**Creates and writes Prepares and writes** grant applications **based on identified needs** to obtain new program funding as appropriate for department goals and responsibilities. **Oversees the departments compliance of guidelines and requirements for grant funding including but not limited to reviewing and approving**. Administers grant and program funds, including ensuring compliance with guidelines and requirements of grants/funding agencies, compiling and filing required reports and reapplications. Maintains, and maintaining communications with funding agencies as needed.

Attends professional education workshops and training seminars as required.

Provides leadership support for quality improvement, performance management, and workforce develop, and all related accreditation activities that promote best practices in public health practices. **Ensures department compliance with all accrediting processes and licensing requirements.** 

Serves as a public health emergency responder, responding to and assisting in resolving public health emergencies, including serving on a 24-hour call for emergencies.

Performs related duties as assigned.

#### I. JOB REQUIREMENTS:

Master's Degree and/or equivalent experience in public health, public administration, or related field. Possession of or ability to obtain certification as a registered Environmental Health Specialist in the State of Indiana.

Possession of National Incident Management System (NIMS) certification.

Thorough knowledge of standard principles and practices of public health/environmental sanitation, with ability to effectively administer Department operations and develop/implement Department policies and procedures accordingly.

Thorough knowledge of federal, state, and local laws and regulations governing Health Department operations, with ability to effectively monitor operations, maintain records and files, and draft ordinances and department policies to assure compliance with all legal requirements.

Working knowledge of County and department budget processes and ability to properly prepare and administer department budget, including ability to effectively obtain and retain special program funding, write grants, compile required reports, and ensure compliance with grant/funding requirements.

Working knowledge of Standard English grammar, spelling, and punctuation and ability to use standard office equipment, including computer, keyboard, and telephone, copier, and fax machine. Ability to effectively communicate orally and in writing with co-workers, other County departments, Indiana Department of Health (IDOH), and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to supervise department personnel, including interviewing candidates and making hiring recommendations to Health Officer, providing training, making work assignments, monitoring and reviewing daily work, evaluating performance, and providing corrective instruction. Conducts regular meetings with staff to review department operations and share professional information as appropriate.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in written form.

Ability to respond to swiftly and rationally to emergencies on 24-hour basis.

Ability to occasionally work evenings and extended hours and travel out of town for training, sometimes overnight.

Possession of a valid Indiana driver's license and demonstrated safe driving record.

#### II. DIFFICULTY OF WORK:

Incumbent administers Health Department operations in accordance with generally applicable procedures and legal guidelines and requirements, exercising judgment to effectively supervise personnel, assess and improve department operations, respond to complaints, and ensure compliance with legal requirements. Incumbent's work includes both administrative and investigation/enforcement duties, involving a wide variety of different, individual situations and requiring careful consideration of complex circumstances and variables.

#### III. <u>RESPONSIBILITY:</u>

Incumbent makes a significant contribution to the outcomes of the department. Goals and general objectives of Incumbent's work are known, with highly unusual problems and/or sensitive problems reviewed with Health Officer and Board as needed. Work is reviewed for soundness of judgment, compliance with Department policies and legal requirements, and continuing quality of Health Department services for Monroe County.

#### IV. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains communication with co-workers, other County departments, Indiana Department of Health (IDOH), and the public for purposes of responding to complaints, ensuring compliance with laws and requirements, disseminating public health information, developing services, and supervising personnel.

Incumbent reports directly to Health Officer.

#### V. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in a standard office environment, including sitting/walking at will, lifting/carrying objects weighing up to 50 pounds, bending/crouching/kneeling, reaching, close/far vision, color/depth perception, hearing sounds/communication, and handling/grasping/fingering objects. Incumbent may be exposed to normal hazards associated with investigations of food borne illness for which safety precautions must be followed at all times. Incumbent may be exposed to potentially irate/hostile individuals.

Incumbent occasionally works evenings and extended hours and travels out of town for training, sometimes overnight. Incumbent periodically responds to emergencies on a 24-hour basis.

#### APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Health Administrator for the Monroe County Health Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes \_\_\_\_\_ No \_\_\_\_\_

Applicant/Employee signature

Date

Type or Print name

~~~~~~~~~~~

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

#### **POSITION DESCRIPTION COUNTY OF MONROE, INDIANA**

<b>POSITION:</b>	Registrar
<b>DEPARTMENT:</b>	Health
<b>DIVISION:</b>	Vital Records
WORK SCHEDULE:	As Assigned
JOB CATEGORY:	COMOT (Computer, Office Machine Operation, Technician)

#### DATE REVISED: July 2013 DATE REVISED: February 2021

STATUS: Full-time FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application proves or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Registrar for the Monroe County Health Department, responsible for ensuring proper collection, filing, preservation, and certification of vital records for Monroe County, supervising related personnel, providing prompt and accurate service to private individuals seeking vital records and other information, and providing direct support to the public.

#### **DUTIES:**

Supervises assigned personnel, including making hiring and termination recommendations, interviewing applicants, monitoring, and making work assignments and schedules, delegating responsibilities, providing training and corrective instruction, and evaluating performance.

Registers and trains new hires for access to receipt program, birth and death systems, and online ordering system. Monitors and instructs new hires on required new hire training and obtaining their notary license. Adds new hire to email distribution lists and enrolls in professional memberships.

Provides ongoing performance management, mentoring, professional development, and training of Vital Records employees. Approves conference and training requests and forwards for approval from the Health Administrator. Oversees Vital Records employee timekeeping and notifies Health Administrator of any issues.

Oversees start-of-day opening and end-of-day closure procedures, ensuring balances for all receipts with applications are accurate and makes daily bank deposits. Collaborates with the Financial Manager, as needed, to correct any discrepancies in the monthly Report of Collections.

Totals and balances daily receipts and prepares bank deposits. Prepares monthly report of collections for fees collected and deposited in general fund as requested by Health Administrator.

Receives applications for food licenses, real estate, septic system, pool, trash hauler, campgrounds, and other permits. Collects and receipts fees for all permits and birth/death certificates and files documents accordingly.

Takes applications and records food licenses and real estate, septic system, pool, solid waste, camp, and other permits; collects and receipts fees and files documents accordingly. Totals and balances daily receipts and prepares bank deposits. Prepares monthly report of collections for fees collected and deposited in general fund.

#### Oversees records retention for Vital Records according to state guidelines.

Participates in code review process and makes suggestions to the Health Administrator. Follows through on code changes affecting Vital Records and other sections as fee changes warrant. Maintains and updates internal fee collection program with any changes.

Participates in accreditation process and quality improvement projects as assigned.

## Receives and fulfills public records requests for birth and death certificates. Serves as a backup to monitors Health Department email inbox, forwarding to appropriate persons.

Prepares, records, and preserves vital records according to Indiana Department of Health (IDOH) guidelines, including ensuring proper processing and filing of all vital records, transferring records and compiling required reports, and working with IDOH personnel/officials to coordinate services and resolve problems with procedures and individual records as required.

Amends local health records according to state guidelines for amendments by notification, court order, correction affidavits, and adoptions, including locating original records in books and on computer and making appropriate amendments.

Issues certified birth and death certificates as requested, including assisting individuals with completing applications, processing certificates, making and certifying copies, and collecting and receipting payments.

Assists funeral homes and/or families with processing electronic death records as appropriate, including verifying accuracy of forms, filing, and preparing records for filing with IDOH. Prepares indexing accordingly. Assists funeral personnel and health care providers by providing current information regarding regulations and forms for death records.

Assists with preparing and processing new birth records with the state, including receiving birth notifications from hospital, reviewing physician verification, sending, and processing birth record verifications to/from mothers, and forwarding records to state. Updates birth record index accordingly. Prepares amendments to birth records and responds to court orders for birth record changes as needed; forwards appropriate forms to state agency as required.

Assists Serves as backup for the Financial Manager in including but not limited to preparing department payroll, including maintaining records of vacation, personal, and sick days, obtaining required signatures, and submitting records to Auditor's office. Assists in preparing annual department budget, submitting to Auditor. Verifies financial records as required. Prepares and submits accounts payable claims to the Health Administrator and Health Officer for review, then provides documentation to Auditor's Office for processing. Tracks accounts payable checks accordingly. Prepares bi-weekly departmental payroll and provides to Health Administrator for review. Maintains department payroll records and ledgers. Ensures appropriate funding sources

> Registrar, Original Approved 11/30/2021 Page 2

## for payroll, reconciles department ledger totals and submits to Health Administrator for review and approval.

**Directs and oversees daily operations of the Vital Record Division including but not limited to** answering telephone and receiving office visitors, taking messages, directing callers to appropriate persons or department, and responding to inquires as appropriate, **, including explaining procedures, interpreting ordinances and regulations**, providing international travel information, tracing genealogical records **and scheduling assigned personnel to sort and distribute daily mail.** 

Notarizes documents as requested.

Composes and types a variety of letters, memos, reports, and other correspondence **for approval by the Health Administrator** to be distributed to local, state, and federal agencies as required. Assists with proper retrieval and filing of **Department Vital R**ecords and maintains filing systems accordingly. Updates State Regulations books as needed.

Provides Auditor with County death reports. Provides infant mortality report and reports of minor's death to officials.

Works with personnel from Social Security, U.S. Military, FBI, Department of Immigration, U.S. Ambassadors, and a variety of other county and local government departments, social agencies, and professionals to request and/or provide birth/death verifications and related information.

Monitors and replenishes Ensures proper inventory of departmental forms and supplies. Manages supply orders by division managers and coordinates other office needs as appropriate. and completes and forwards purchase orders/claims to the Auditor. Maintains repair/maintenance contracts, orders repairs on office equipment as necessary, and recommends renewal of renews service contracts to the Health Administrator.

Manages and maintains inventory of Health Department capital assets including assets obtained through grant funds.

Attends education workshops and training seminars as required.

Serves as a public health emergency responder, responding to and assisting in resolving public health emergencies, including serving on a 24-hour call for emergencies. Activates Emergency Mass Notification System where assigned.

Participates in accreditation process and quality improvement projects as assigned.

Performs related duties as assigned.

#### I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

Associates Degree in related field or equivalent combination of education and previous work experience, including Accounting. Ability to speak additional languages preferred.

Possession of and ability to retain possession of an Indiana Notary Public license. Possession or ability to obtain possession of National Incident Management System (NIMS) certification.

Possesses or has ability to possess and maintain Indiana Vital Records Association (IVRA) certifications required to issue birth/death records, regarding record retention, and record preservation. "Capstone" Certification must be obtained within five (5) years of hire date.

Thorough knowledge of standard policies and practices of Monroe County Health Department, with ability to apply appropriate procedures accordingly.

Thorough knowledge of legal requirements and proper procedures for processing, filing, certifying, and releasing vital records information with ability to assure proper maintenance of department files, apply and interpret procedures, and complete additional training seminars as required.

Working knowledge of basic bookkeeping, with ability to properly collect and receipt payment, total and balance daily receipts, and prepare bank deposits and various financial reports as needed.

Working knowledge of standard English grammar, spelling, and punctuation, ability to type with speed and accuracy, and ability to use standard office equipment, including department computer software, computer, calculator, printer, postage meter, vehicle, keyboard, telephone, copier, and fax machine.

Ability to accurately prepare, verify and file department information and maintain complete and accurate records as directed.

Ability to use resources, including Indiana Code, Vital Statistics Manual, Monroe county maps, GIS, Indiana Birth Registration System, VitalChek Tutorials, Indiana Death Registration System.

Ability to effectively communicate orally and in writing with co-workers, other county departments, funeral homes, vendors, various state agencies, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to supervise assigned personnel, including making hiring and termination recommendations, interviewing applicants, monitoring and making work assignments and schedules, delegating responsibilities, providing training and corrective instruction, and evaluating performance.

Ability to provide public access to or maintain confidentiality of department information and records according to state and federal requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug free workplace, and personal conduct.

Ability to competently serve the public with diplomacy and respect, including occasional encounters with irate/hostile persons.

Ability to compile, collate, and classify date and take action based on data analysis.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to work on several tasks at the same time and work rapidly for long periods, occasionally under time pressure.

Ability to understand, memorize, retain, and carry out written or oral instructions and present findings in written form.

Ability to occasionally work extended hours travel out of town for training and conferences, sometimes overnight.

Ability to respond swiftly and rationally to emergencies on 24-hour basis.

Possession of a valid Indiana driver's license and demonstrated safe driving record.

#### II. <u>RESPONSIBILITY:</u>

Incumbent maintains office operations and performs regular and recurring registrar duties, exercising judgment in ensuring compliance with record and confidentiality requirements. Incumbent performs duties according to a flexible, customary routine with priorities determined by service needs of the public. Errors in work are generally detected errors may result in loss of time for correction and inconvenience to department, other government agencies, and members of general public.

#### III. PERSONAL WORK RELATIONSHIPS:

Incumbent maintains communication with co-workers, other county departments, funeral homes, vendors, various state agencies, and the public for a variety of purposes, including processing permits, applications, and vital records, collecting and receipting fees, coordinating services and procedures, and providing, requesting, and/or verifying Department information.

Incumbent reports directly to Health Administrator.

#### IV. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in standard office environment, including sitting/walking at will, lifting/carrying objects weighing under 25 pounds, bending, reaching, keyboarding, close/far vision, crouching/kneeling, speaking clearly, hearing sounds/communication, and handling grasping objects.

Incumbent occasionally works extended hours, travels out of town for training and conferences, sometimes overnight, and responds to emergencies on a 24-hour basis.

#### APPLICANT/EMPLOYEE ACKNOWLEDGMENT

The job description for the position of Registrar for the Monroe County Health Department describes the duties and responsibilities for employment in this position. I acknowledge that I have received this job description, and understand that it is not a contract of employment. I am responsible for reading this job

description and complying with all job duties, requirements and responsibilities contained herein, and any subsequent revisions.

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes \_\_\_\_\_ No \_\_\_\_\_

Applicant/Employee signature

Date

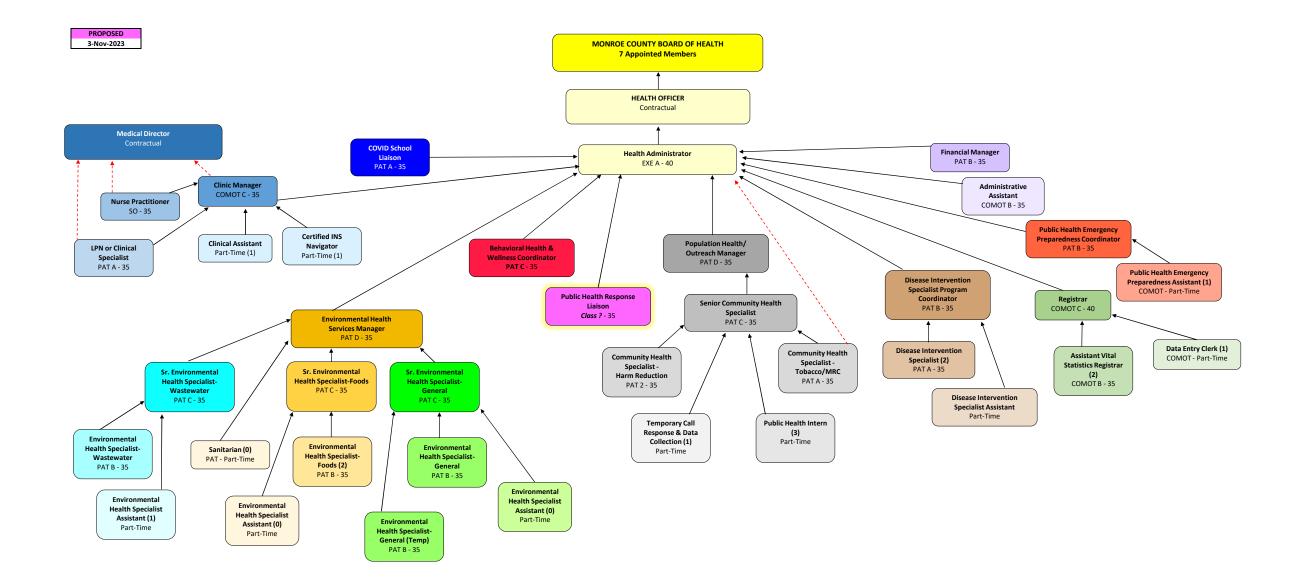
Type or Print name

 $\diamond$ 

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date



#### PERSONNEL ADMINISTRATION COMMITTEE

#### Agenda Request Form

Complete <u>ALL</u> applicable highlighted areas below.

DEPARTMENT: Veterans Affairs	MEETING DATE REQUESTED (Tentative): 11/7/2023
Request Presenter(s): Steve Miller	Phone: 812-349-2537
Was the Council Liaison notified prior to submitting	this Agenda Request: YES
FUND INFORMATION: (Mark with an "X" in all appli	cable boxes)
Fund Name: County General	
Fund Number: 10043 Locat	on Number: 012
PURPOSE OF REQUEST: (Mark with an "X" in all app	licable boxes)
Creation of New Position Title:	
Amend Current Position Description	tle: Benefits Coordinator to Deputy Director/Assistant Veteran Service Officer
Hours: 40 Classification:	PAT Level: A
Other (Specify)	
Narrative: Give a DETAILED SUMMARY explanat	ion for the request (purpose, action needed, etc.).

I am writing to formally request a comprehensive review of the enclosed job description pertaining to the Veterans Affairs position of Benefits Coordinator. Our overarching objective is to elevate this role to the PAT A level, standardize the workweek to 40 hours, and implement a title modification to Deputy Director/Assistant Veteran Service Officer.

The primary impetus behind this proposed transformation is to fortify our capacity to extend and augment our outreach endeavors, with the ultimate aim of providing an enhanced level of support to our esteemed veterans and their families. We firmly believe that the elevation of this position is essential to furnish the requisite expertise and assistance required to achieve these objectives.

Furthermore, the proposed change in nomenclature aligns with a nationwide initiative to adopt the title of Assistant Veteran Service Officer for personnel who are veterans and have attained and sustained accreditation from various Veteran Service Organizations (VSO). This accreditation significantly enhances our ability to serve our clients and their families by granting access to critical VA and VSO resources, including websites and materials. This broader access facilitates a more comprehensive and effective approach to assisting our clients.

I sincerely appreciate your valuable support in this matter, and we eagerly anticipate your input and guidance throughout the entirety of this process. Should you require any additional information or seek further clarification, please do not hesitate to contact us.

Forward <u>entire</u> Request Form with all supporting documents to: <u>councilrequests@co.monroe.in.us</u>

Contact the Council Administrator (Ext. 2516) with any questions regarding the Agenda Request Form.

#### **POSITION DESCRIPTION COUNTY OF MONROE, INDIANA**

<b>POSITION:</b>	Veterans Affairs Benefits Coordinator Deputy Director/ Assistant Veteran Service	
DEPARTMENT:	Veterans' Affairs	Officer
WORK SCHEDULE:	As assigned	
<b>JOB CATEGORY:</b>	<b>COMOT (Computer, Office Machine</b>	<b>Operation, Technician)</b> <u>PAT</u>

DATE WRITTEN: January 2007	STATUS: Full-time
DATE REVISED: April 2016, February 2021	FLSA STATUS: Non-exempt

To perform this position successfully, an individual must be able to perform each essential function of the position satisfactorily. The requirements listed in this document are representative of the knowledge, skill, and/or ability required. Monroe County provides reasonable accommodations to qualified employees and applicants with known disabilities who require accommodation to complete the application proves or perform essential functions of the job, unless those accommodations would present an undue hardship.

Incumbent serves as Veterans Affairs Benefits Coordinator Deputy Director/Assistant Veteran Service Officer for Monroe County, responsible for providing benefit information and assistance to veterans, their dependents, and survivors.

#### **DUTIES**:

Assists Veterans' Service Officer/ Director and assumes all responsibilities in his/her absence including overseeing and directing general operations of the Veteran's Affairs Office.

Provides veterans' benefits information to veterans, their dependents and survivors, local government agencies, and the media by responding to inquiries in person, by mail, by telephone, and email.

Assists eligible veterans in procurement and proper completion of federal veterans' benefit application forms. Researches and determines applicable laws, precedent cases, eligibility requirements, and monitors claim status, as necessary. Assists clients' designated veterans' organization representative as Power of Attorney on claim matters.

Responsible for outreach efforts, attends Veteran Service Organization meetings, attends coalition meetings, and participates as board or committee member for veteransveterans' organizations and groups.

Completes Veterans' initial benefit application or reopens existing claims for compensation or pension.

Prepares or assists Veterans in preparation of appropriate benefits claim forms and other documentation.

Files application for eligible veterans for education and vocational rehabilitation.

Assists in resolving problems encountered by veterans by searching information and filing appeals with Federal Veterans' Administration for denied benefits.

Researches medical conditions and obtain necessary medical records and statements form physicians to support claims.

Obtains necessary financial information and corroborating information and documents through contact with friends, family members, and/or other sources.

Prepares department correspondence, agendas, vouchers, requisitions, and related documents, as required. Orders office supplies, monitors office supply budget, and processes all claims.

Maintains and updates department records and files, ensuring convenient retrieval.

Attends Veterans Service Officers' meetings and training seminars as required by IDVA.

Performs related duties as assigned.

#### I. JOB REQUIREMENTS AND DIFFICULTY OF WORK:

High school diploma or GEDAssociate degree (A.A.orAB.S.) in Human Services, Social Work, Medical Sciences, Public Affairs, Military Science or similar or equivalent knowledge gained through experience and/or education.

One to two years related experience and/or training.

Ability to attend and successfully complete conferences and trainings for County Service Officer as required.

Thorough knowledge of federal, state, and county veterans' benefits, eligibility criteria, and application procedures.

Working Thorough knowledge of Microsoft Office, Excel, Word, Outlook, and PowerPoint, and ability to learn and use institutional software systems.

<u>Thorough Kk</u>nowledge of military documents, acronyms, and order formats, medical terminology, and categories of active and reserve duty. Knowledge of military retirement pay and medical benefits.

Ability to effectively counsel potential clients from a wide range of ethnic backgrounds, age groups, educational levels, disabilities, and wartime or peacetime backgrounds, and to deal with veterans and their families in a sincere and helpful manner.

Ability to accurately research benefit issues, interpret sources such as federal and private web pages and gauge reliability, and apply case law regarding county, state, and federal veterans' programs' intent, legislative history, eligibility criteria, application, and appeal procedures.

Ability to maintain accurate records and prepare necessary activity reports. Ability to copy data from one document to another and interview to obtain information. Ability to provide supportive documentation, including trend analysis, for budget requests.

Ability to properly operate standard office equipment, including computer, printer, calculator, fax machine, and VOIP telephone.

Ability to provide public access to or maintain confidentiality of department information and records according to state requirements.

Ability to comply with all employer and department policies and work rules, including, but not limited to, attendance, safety, drug-free workplace, and personal conduct.

Ability to effectively communicate orally and in writing with co-workers, other County departments, IDVA, <u>US Department of Veterans Affairs</u>, and the public, including being sensitive to professional ethics, gender, cultural diversities, and disabilities.

Ability to gain and maintain Accreditation from the Indiana Department of Veterans Affairs, National Association of County Veteran Service Officers, and other Veteran Service Organizations to have access to Veterans Benefits Management System and to Act as Power of Attorney for Veterans Claims.

Ability to work alone with minimum supervision and with others in a team environment.

Ability to understand, retain, and carry out written or oral instructions and present findings in oral or written form.

Ability to occasionally work extended hours and travel out of town for training seminars, sometimes overnight.

#### II. <u>RESPONSIBILITY</u>:

Incumbent applies standard practices of the field in providing assistance to clients, maintaining records and ensuring accurate and timely completing of forms and applications. Incumbent develops own objectives for area of responsibility, exercises independent decision-making, and discusses interpretations for objectives with supervisor. Incumbent contributes to overall departmental operations by applying departmental objectives to specific cases and circumstances. Incumbent's work is primarily reviewed for attainment of objectives and soundness of judgment.

#### III. <u>PERSONAL WORK RELATIONSHIPS</u>:

Incumbent maintains frequent contact with co-workers, other County departments, IDVA, <u>US</u> <u>Department of Veterans Affairs</u>, and the public for a variety of purposes, including obtaining and exchanging information and completion of ongoing in-service training.

Reports directly to Veteran's Service Officer/Director.

#### IV. PHYSICAL EFFORT AND WORK ENVIRONMENT:

Incumbent performs duties in a standard office environment, including sitting/walking at will, sitting for long periods, lifting/carrying objects weighing less than 25 pounds, close vision, keyboarding, speaking clearly, and hearing sounds/communication.

Incumbent occasionally works extended hours and travels out of town for training seminars, sometimes overnight.

#### APPLICANT/EMPLOYEE ACKNOWLEDGMENT

Is there anything that would keep you from meeting the job duties and requirements as outlined? Yes\_\_\_\_\_ No\_\_\_\_\_

Applicant/Employee signature

Date

Type or Print name

~~~~~~~~~~~

I have reviewed the job duties, requirements and responsibilities contained herein with the employee.

Department Head/Supervisor signature

Date

Date 10/3/2023

## **Employee Job Questionnaire**

#### COUNTY OF MONROE, INDIANA

The County of MONROE, Indiana has retained Waggoner, Irwin, Scheele & Associates to update the County's job descriptions, which includes an updated description of your position. The information you supply on this questionnaire will be used to draft that description.

| Position Title: | Veterans Affairs B | enefits Coordinator |
|-----------------|--------------------|---------------------|
| Department:     | Veterans Affairs   |                     |
| Employee Na     | me: Andrew Blake   |                     |
| FLSA Stat       | us: OExempt        | • Non-exempt        |
|                 |                    | • Purpose •         |

This questionnaire is intended to secure accurate information regarding essential elements of your position, including

- the duties you currently perform
- the requirements (skills, education, etc.) of your position
- the nature of your responsibilities
- the nature of supervision over your work
- the nature of your communication with others

This questionnaire is not

- an efficiency analysis
- a department reorganization study
- · a measure of how well you perform your duties

#### • Instructions •

- 1. Please read the entire questionnaire carefully before answering any questions to avoid duplicating your responses. If you need more space on any question, please attach additional pages.
- 2. Take time to answer each question carefully and completely. It is essential that your responses be clear, concise, and thorough to ensure that the job description prepared for your position will accurately describe your duties and responsibilities.
- 3. Please include an explanation of abbreviations, technical language, or specialized references you use on this questionnaire to ensure our understanding of them.
- 4. Please feel free to use any existing job description for reference purposes or completing the duties section. Please attach any referenced job description and respond to questions in the remaining sections of the questionnaire.

#### DO NOT DETACH THIS INSTRUCTION SHEET

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### Helpful Hints for Completing the Job Questionnaire

Please be aware that this project does <u>NOT</u> involve performance evaluations of individuals. We aren't collecting information about <u>how</u> you perform, only <u>what</u> you perform. This questionnaire is designed to help you identify and describe important aspects of your job.

If you do not understand something or have a question, write a note directly on the questionnaire and a *Waggoner*, *Irwin, Scheele & Associates, Inc.* staff member will discuss it with you.

Keep in mind that a job description provides a "snap shot" of the basic functions of a position – it is <u>not</u> a procedural manual with excess detail of every step in a process. In other words, a job description should provide just enough information that the reader understands <u>the essential functions and the skills necessary to perform the job</u>.

It may help to imagine you have been promoted, and this questionnaire will be used to train the new employee in this position. Begin with the tasks on which you spend most of your time, or that are of greatest importance, then work your way through your basic duties until you describe periodic tasks. Following are some hints for writing clear duty statements:

• You may use abbreviations or acronyms, but please write the full term at the top of the page, or the first time you use them; for example, "Maintains statistics on computer for Indiana Department of Environmental Management (IDEM)."

 $\circ$  Also, explain any terminology that may be unique to your department, such as report names and form numbers. For example, "Complete XQ325 forms" may be something you do every day, but it is very likely that no one outside your department would have any idea what is involved. It would be better to say, "Complete payment assistance application forms."

• Are machines, equipment, or special tools involved in accomplishing tasks? For example, "*Post payments*" could involve a computer or writing in manual ledgers, and "*Update maps*" could be done with drafting tools or a computer.

Throughout the remainder of the questionnaire, read and follow directions carefully. Use **specific examples** to illustrate your answers whenever possible, and remember to note any questions you have.

Thank you for your valuable time!

Section I

# **Essential Functions of Position**

# 1. Please summarize, in one sentence, the primary purpose of your position as you understand it.

Works through various federal, state and local agencies to assist veterans and their eligible dependents in obtaining the benefit--CONTINUED

2. Describe in detail the primary duties and functions of your position. Those duties which you perform daily or that require a substantial portion of your time should be listed first, with the duties that are performed less frequently or that require lesser portion of your time listed last. Please attach a copy of existing job description, if applicable.

# If Duties Section of your existing job description is accurate please note "see existing description' and/or add any additional duties NOT listed on your existing job description.

Below is a scale that rates how essential a job duty/function is to your position and how frequent that duty/function is performed. Once you have described the primary duties and functions of your position, please indicate the essentiality and frequency. For example,

| essentiality and nequency. For example,                             | Essentiality                                                                                    | Frequency                                               |
|---------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|---------------------------------------------------------|
| Supervise subordinate personnel                                     | <u>_B</u>                                                                                       | <u> </u>                                                |
| <b>ESSENTIALITY</b>                                                 | <b>FREQUENCY</b>                                                                                |                                                         |
| A= Marginal function of the job<br>B= Essential function of the job | C= Perform annua<br>D= Perform quart<br>E= Perform mont<br>F= Perform week<br>G= Perform on reg | erly at a minimum<br>hly at a minimum<br>y at a minimum |

# List Primary Duties:

 Provides veterans' benefits information to veterans, their dependents and survivors, local government agencies, and the media by responding to inquiries in person, by mail, by telephone, and email.

2. Assists eligible veterans in procurement and proper completion of federal veterans' benefit application forms. Researches and determines applicable laws, precedent cases, eligibility requirements, and monitors claim status, as necessary. –CONTINUED



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claims for compensation or pension.

Completes Veterans' initial benefit application or reopens existing

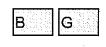
3.

- <sup>4.</sup> Prepares Veterans in preparation of appropriate benefits claim forms and other documentation.
- <sup>5.</sup> Files application for eligible veterans for education and vocational rehabilitation.
- Assists in resolving problems encountered by veterans by searching information and filing appeals with Federal Veterans' Administration for denied benefits.
- Researches medical conditions and obtain necessary medical records and statements form physicians to support claims.
- Obtains necessary financial information and corroborating information and documents through contact with friends, family members, and/or other sources.
- 9. Prepares department correspondence, agendas, vouchers, requisitions, and related documents, as required. Orders office supplies, monitors office supply budget, and processes all claims.





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|                 | a second individual se                |









- 10. Maintains and updates department records and files, ensuring convenient retrieval.
- 11. Conducts community outreach to maximize awareness of services and resources available to veterans and their family members.
- 12. Attends Veterans Service Officers' meetings and training seminars as required by IDVA.
- 13. Responsible for outreach efforts, attends Veteran Service Organization meetings, attends coalition meetings, and participates as board or committee member for veterans organizations and groups.
- <sup>14.</sup> Assist with annual budgeting process.

# Section II

# Job Requirements/Training/Certification

1. Check level of formal education that is <u>required</u> for your position. When specifying college degrees, please identify acceptable fields of study.

High school diploma/GED 🗹 Associate Degree 🗌 Baccalaureate Degree 🗌 Masters Degree

Other (Please describe):

Acceptable fields of study: Human Services, Social Work, Medical Sci, Public Aff, Military Sciences or similar,

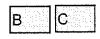
# 2. Specialized training, certification, and/or specific experience <u>required</u> for your position (such as Certified Public Accountant).

Accreditation by Indiana Department of Veterans Affairs. National Association of Veteran Service Officers, and other --CONTINUED

ВЕ

ВС

B





3. Describe the required knowledge, skills, and abilities necessary to perform your duties effectively (such as budgeting, grant writing, public speaking).

Knowledge of Military Terminology, VA Terminology and VA process as well as VA programs, public speaking, medical terminology.

4. Briefly list those information sources that you use regularly in the performance of your duties (e.g. professional journals, reference works, textbooks, legal codes, technical manuals).

38 Code of Federal Regulations, VA Manual M-21, Indiana Code for Veterans (and Survivors) Benefits, VetraSpec Users Manual.

- 5. Does your position require that you have a valid driver's license? Yes O No If yes, for which duties? Required for outreach efforts and for visiting clients at nursing homes and other off site locations.
- 6. Does your position require you to be at least 21 years of age? Yes No

# 7. Does your position <u>require</u> passage of a:

| Medical exam?       | OYes         | ⊙No  |
|---------------------|--------------|------|
| Drug test?          | OYes         | ⊙ No |
| Psychological exam? | OYes         | ⊙ No |
| Written exam?       | <b>O</b> Yes | • No |

Other tests:

# 8. Check and list equipment you operate as a regular part of performing your duties:

| Computer     | Typewriter       | Calculator      | Transcriber/dictaphone | ✓ Vehicle |
|--------------|------------------|-----------------|------------------------|-----------|
| Other (Pleas | e describe) Tele | ephone, VPN, Sc | anner and Fax          |           |

# 9. Your fundamental job duties may involve some relationship between you and <u>data</u> (i.e. information, facts, figures, measurements, statistics, notes, reports). Check the following statements that <u>most accurately</u> describe your involvement with data.

Compare or observe similarities and differences between data, people, or things.

Compute, perform arithmetic operations, such as measuring, figuring, tabulating test/survey results, developing \_\_\_\_\_ operating budget, determining charges.

- Compile, collate, or classify data.
- Analyze, evaluate, observe, diagnose, investigate.

Coordinate, place, make determinations, take action based on data analysis.

Fabricate data to discover facts or develop concepts or interpretations.

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# 10. Your fundamental job duties may involve the ability to deal with spoken and written materials, from simple instructions to complex sources of information or ideas. Check the following statements that <u>most accurately</u> apply to your job responsibilities.

- Understand and follow oral or written instructions; write notes; request information or supplies in writing or orally (example: copy a list of names and addresses; discuss work instructions with supervisor, enter data on computer from a report).
- File, post, mail materials; copy data from one document to another; interview to obtain information (example: keep record of purchase orders; discuss list of products with customers, take phone messages/customer complaints).
- Read work rules; use standard English grammar, spelling, pronunciation; speak clearly, with poise (example: read copy to type letters, prepare written reports, greet customers and answer their questions).
- Write/edit reports/news releases/contracts/leases; prepare/give presentations; interview/counsel/advise people (example: prepare and evaluate technical data; write proposals; counsel clients, negotiate contracts, edit newsletter).

# Section III

# **Difficulty of Work/Responsibility**

- 1. Which of the following phrases <u>best</u> describes the type of supervision you receive?
- Immediate supervision. Assignments performed according to specific detailed instructions for easily learned, non-specialized or repetitive duties. No flexibility in the job.
- Assignments and objectives set jointly by immediate supervisor and myself. Follow standard operating procedures or policy and procedural manuals. Must have supervisor's permission to deviate from standard operating procedures. Some flexibility in the job.
- Indirect or occasional supervision. Assignments guided by definite objectives using a variety of methods or procedures. Plan and arrange own work and only refer to supervisor for unusual matters, such as policy interpretations. Moderate flexibility in the job.
- General supervision. Assignments guided by broad policies and/or general objectives. Establish procedures and performance standards and interpret policies. Refer to supervisor when interpretations of departmental policies, programs, expenditures, are thought necessary. Have a high degree of flexibility in the job.
- Administrative or advisory direction from a board or CEO. Develop own objectives for area(s) of responsibility. Establish major administrative unit/departmental policies, procedures, and performance standards. Accountable for department/unit results. Almost total autonomy in the job.

#### 2. Which of the following phrases <u>best</u> describes the criteria for which your work is reviewed? Work is reviewed primarily for

| work is reviewed primarily.   |                                                                           |
|-------------------------------|---------------------------------------------------------------------------|
| Attainment of objectives      | Appropriate supervision or direction of assigned operations               |
| Compliance with precedent     | Adherence to instructions/guidelines I Compliance with legal requirements |
| Technical accuracy            | Compliance with Department policy Effect on Department goals/objectives   |
| Soundness of judgment         | Other (please describe):                                                  |
| If you checked more than two, | please provide explanation:                                               |

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# 3. Check one of the following statements that <u>most accurately</u> describes the judgment you use in performing fundamental job duties.

- O Decisions are always determined by specific instructions or existing, well established policies and procedures.
- On rare occasions, decisions are made in the absence of specific policies and procedures, and/or guidance from my supervisor.
- O Periodically, decisions are made in the absence of specific policies, and/or guidance from my supervisor.
- Frequently, decisions are made which are restricted only by organization-wide policies. Little direct guidance from supervisor.
- O Decisions are restricted by only the broadest policy and/or guidance from supervisor.
- O Regularly make decisions in absence of policy; subject only to guidance from board/CEO.

# 4. Which of your duties requires the most judgment and adaptation of your position's guidelines? *Please* explain and provide examples.

Assists eligible veterans in procurement and proper completion of federal veterans' benefit application forms. Researches and determines applicable laws, precedent cases, eligibility requirements, and monitors claim status, as necessary. Assists clients' designated --CONTINUED

# 5. What programs, persons and/or functions are directly affected by the decisions you make?

Veterans, families and surviving spouses are financially affected by the decisions I make.

6. Give an example of the highest level decision you can make and what person or body (e.g., Board of Directors, Vice President) can overrule your decision.

I can make decisions about how I perform work functions and how I schedule my clients. Additionally I am able to commit to after-hours functions and appointments to assist clients and organizations.

# Section IV

# Personal Work Relationship/Supervisory

# 1. What is the name and position title of your immediate supervisor?

Supervisor: Steven Miller Title: Veteran Service Officer/Director

# 2. Complete A) and B) only if you supervise or direct the work of others:

# A) List names and position titles of employees you supervise or direct as a regular part of your duties.

# B) Check which statements most accurately describe your managerial/supervisory responsibilities. Analyze periodically the workload and the human resource needs of my organizational unit. Recommend increases and decreases in staff.

- Review position documentation for newly created or significantly revised positions. Obtain approval of supervisor.
- Interview candidates for openings and make hiring recommendations.
- Make hiring decisions.
- Orient new subordinates in the department regarding department policies/procedures and what is expected of them in the way of performance results.
- Plan, delegate and control work assignments and special projects to assigned staff.
- Establish specific work goals or quantitative and qualitative standards to be achieved by assigned staff.
- Train/develop/motivate assigned staff to improve performance and prepare for higher-level positions.
- Determine significant changes in responsibilities and major tasks of assigned staff by reviewing their position responsibilities on a regular basis.
- Evaluate the performance results of assigned staff. Discuss present and past performance with each person. Keep supervisor informed of performance discussion results.
- Review salaries of assigned staff and recommend changes when warranted.
- Recommend personnel actions, such as promotions, transfers, demotions.
- Keep supervisor and assigned staff informed of organization developments they need to know to carry out their position responsibilities.
- Maintain discipline and recommend corrective action as warranted.
- Communicate and administer personnel programs and procedures for my area in accordance with approved policies.
- 3. List other departments, agencies, organizations, and others with whom you regularly communicate.

Department of Veterans Affairs, Indiana Department of Veterans Affairs, Doctors officies, Local Government Offices, Community Organizations, Veteran Service Organizations, Nursing Homes, Members of the Public

4. Check which statements <u>most accurately</u> describe your contact with employees, customers, governmental officials, or the general public.

- Cooperative Work Relationship: Give and receive information; Give factual information, test results, etc.; make referrals to other organizations.
- **Render Service:** Explain and interpret policies and procedures. Execute policies; maintain coordination of department/division operations.
- **Instruct:** Teach or present subject matter to others through explanation, demonstration and supervised practice.
- **Negotiate:** Exchange ideas, information and opinion with others to form policies, products, programs, and/or arrive jointly at decisions or solutions to problems.

Mentor: Deal with individuals in terms of their total personality in order to advise, counsel and/or guide them with regard to problems that may be solved by legal, scientific, engineering, clinical, spiritual, or other professional principles.

# Section V

# **Physical Effort/Work Environment**

| 1. Which of the following best describes your <u>primary</u> working environment? |                       |                |                |           |  |  |  |
|-----------------------------------------------------------------------------------|-----------------------|----------------|----------------|-----------|--|--|--|
| Laboratory                                                                        | ☑ Standard office     | Storeroom      | U Vehicle      | Outdoors  |  |  |  |
| Garage/shop                                                                       | Manufacturing setting | ☑ Other (pleas | se describe):  |           |  |  |  |
|                                                                                   |                       | Work off site  | at alternative | locations |  |  |  |
| If you checked more than one, please provide additional explanation.              |                       |                |                |           |  |  |  |
|                                                                                   |                       |                |                |           |  |  |  |

**Essentiality** 

В

В

В

B

В

В

2. Which of the following best describes your primary working conditions? **ESSENTIALITY** 

> N/A= Not Applicable to job A= Marginal requirement of job **B**= Essential requirement of job

# Essentiality

В

B

B

B

В

В

В

В

В

В

В

B

В

|  | work alone | with | minimum | supervision |
|--|------------|------|---------|-------------|
|--|------------|------|---------|-------------|

work under time pressure

work on several tasks at the same time

read/carry out simple written instructions

apply knowledge of people, locations

|       | plan | and    | layout | assigned  | work projects | s |
|-------|------|--------|--------|-----------|---------------|---|
| and d | Pran | ~~~~~~ | 10000  | abbiginea | nom project   | Ģ |

compute/calculate, such as interest

count, make simple arithmetic additions/subtractions

read/interpret detailed prints, sketches, layouts, specifications, maps

prepare detailed reports, such as financial statements, sales activity, product feasibility

plan and present public speaking presentations, fund raisers, special events

sitting & walking at will

standing/walking for long periods

sitting for long periods B

walking on uneven terrain

work with others in a team environment

understand and carry out oral instructions

present findings in oral or written form

work rapidly for long periods

memorize and retain instructions

testify in legal proceedings/court

| A work in extreme hot or cold temper                                       | atures                                          | N/A work                | n wet/icy surroundings                                  |
|----------------------------------------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------------------------------|
| N/A respond to emergencies from off-du                                     | ıty status                                      | N/A work                | with or near chemicals (please list)                    |
| N/A work near fumes, odors, dust, dirt (j                                  | please describe)                                |                         | ite veterans and family                                 |
| N/A work in a noisy environment (descr                                     | ibe noise source)                               | for VA benef            | ome have been turned down<br>its for may be upset/irate |
| N/A work in confined areas (please desc                                    | ribe)                                           | from mental             | or physical disabilities.                               |
| N/A wear protective clothing or equipme                                    | ent (please describe                            | •                       |                                                         |
| N/A work in high places, such as ladders                                   | s, roofs, bucket truc                           | k (please descril       | pe)                                                     |
| A work with or exposed to violent/irat                                     | e individuals (plea                             | se describe)            |                                                         |
| N/A respond to situations involving pote                                   | ntial physical harm                             | to self and othe        | rs (please describe)                                    |
| B lifting under 25 pounds N/A                                              | lifting 25 to 50 pou                            | nds N/A                 | lifting over 50 pounds                                  |
| A pushing/pulling objects A                                                | carrying objects                                | Α                       | crouching/kneeling                                      |
| A bending at waist N/A                                                     | reaching                                        | Α                       | driving                                                 |
| B close vision N/A                                                         | far vision                                      | N/A                     | color perception                                        |
| N/A depth perception B                                                     | speaking clearly                                | В                       | hearing sounds/communication                            |
| N/A handling/grasping objects N/A                                          | fingering objects (p                            | oicking, pinching       | )                                                       |
| 3. List the three most physically demand                                   | ding activities you                             | regularly perfo         | rm in your job.                                         |
| Lifting boxes of files or paper                                            | te state en |                         |                                                         |
|                                                                            |                                                 |                         |                                                         |
|                                                                            |                                                 |                         |                                                         |
| 4. List the three most emotionally dema<br>Irate Veteran or Family Members | nding activities yo                             | ou <u>regularly</u> per | form in your job.                                       |
|                                                                            |                                                 |                         |                                                         |
| Engaging with veterans over stressor situations (retel                     | ing stones of compations                        | ex assault) or other er | notionally draining situations.                         |
| 5. What is your normal work schedule (                                     | example, 8 a.m. 4                               | p.m. M-F)?              |                                                         |
| 8-4 M-F                                                                    |                                                 |                         |                                                         |
| 6. Are you required to:                                                    | Never                                           | <u>Regularly</u> O      | ccasionally                                             |
| a. work extended hours                                                     | 0                                               | 0                       | ٢                                                       |
| b. work weekends                                                           | 0                                               | 0                       | ۲                                                       |

|                                          | <u>Never</u> | <u>Regularly</u> ( | <u> Occasionally</u> |
|------------------------------------------|--------------|--------------------|----------------------|
| c. work evenings                         | 0            | 0                  | ۲                    |
| d. travel out of town, but not overnight | 0            | ۲                  | 0                    |
| For what purpose?                        |              |                    |                      |
| Conferences or trainings                 |              |                    |                      |
| c. travel out of town overnight          | 0            | 0                  | ۲                    |
| For what purpose?                        |              |                    |                      |
| Conferences or trainings                 |              |                    |                      |
| f. respond to emergencies on 24-hr basis | •            | 0                  | 0                    |
| g. on call on rotation basis             | ۲            | 0                  | $\odot$              |

7. Provide any other examples/information which would be helpful in understanding the physical and mental requirements of your job.

8. Is your position politically appointed by a recognized Department Head or Elected Official according to= IC 36-2-16-4? Yes  $\bigcirc$  No  $\bigcirc$ 

# Section VI

# **Certifications**

Employee: I certify that the above statements are an accurate and fair description of my position.

| Name    | (print or type)    | Andrew Blake        | Hire date  | 6-4-2012         |
|---------|--------------------|---------------------|------------|------------------|
| Title [ | Veterans Affairs E | enefits Coordinator | Department | Veterans Affairs |
| Signat  | ure                | <                   | Date       | 10-4-23          |

*Supervisor:* I have reviewed the contents of this questionnaire and find the responses to be accurate. Any additions or modifications I made have been initialed by me and have been discussed with the employee.

Is the position described above, politically appointed by a recognized Department Head or Elected Official according to IC 36-2-16-4? Yes O No O

Signature 🖯

Date 10/4/2023

Please refer any major concerns or questions regarding this questionnaire to

Waggoner, Irwin, Scheele & Associates, Inc. 118 South Franklin Street Muncie, IN 47305 Phone: (765) 286-5195 Fax: (765) 286-2824

# JOB CLASSIFICATION REVIEW FORM

# **County of Monroe, Indiana**

An Equal Opportunity Employer

This form is to be completed by the employee holding the position and/or the Elected Official/ Department Head having hiring, promotion, and termination authority for the office/department. This form is intended to serve as a classification evaluation instrument for the Monroe County Council and Personnel Administration Committee in reviewing requests for classification of jobs.

Review the "Job Classification and Compensation Maintenance Plan" prior to completing this form to ensure the proper procedures have been taken regarding adding or reviewing a position.

• Attach additional pages as needed; return completed form to the COUNCIL ADMINISTRATOR

| Job title Benefits Coordinator                                                                                                                                                                                                                                                                   | Fund-Account-<br>Location <b>1000-0012-10043</b> |  |  |  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|--|--|--|
| Department Veterans Affairs                                                                                                                                                                                                                                                                      | Date 10/04/2023                                  |  |  |  |
| Full-time Part-time Exempt Non-<br>Current Classification                                                                                                                                                                                                                                        | exempt _ Requested Classification                |  |  |  |
| Current Classification <u>control</u> <u>bound</u><br>Current pay <u>\$</u> 21.93 per hour                                                                                                                                                                                                       | Proposed pay \$26.15 per hour                    |  |  |  |
| Employee(s) in this position: (attach supplemental sheet if necessary) Andrew Blake                                                                                                                                                                                                              |                                                  |  |  |  |
| TYPE OF ACTION REQUESTED         Create position       Seniority review         ✓ Qualifications requirements review       Pay policy application/interpretation issues         ✓ Reclassification due to change in duties, responsibilities, work conditions, etc.       Other Please describe: |                                                  |  |  |  |
| Questions 1 through 3 to be completed jointly by the employee and/or<br>Elected Official/Department Head initiating the review                                                                                                                                                                   |                                                  |  |  |  |
| 1. Describe why this new position/added emplo<br>This classification review is necessary due to increased responsibility                                                                                                                                                                         |                                                  |  |  |  |

increases the overall responsibility of the position and adds in substantial new requirements of out reach and community involvement. It also required additional

training and accreditation which will allow the employee to operate at a higher level, thereby increasing the ability of the office to support our veteran and family clients.

| If yes, describe da                                                                                                                                                                                                                                                                                                                                  | te and outcome of that request:                                                                                                                                                                          |                                                                                                                                                                           |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| f this is a request for classification review of an existing position, review the current job<br>escription and make any revisions that are necessary to describe the job being performed.<br>Ittach a copy of the existing job description with your revisions marked with <b>Bold Red</b> for<br>additions and <b>Strikethrough</b> for deletions. |                                                                                                                                                                                                          |                                                                                                                                                                           |
|                                                                                                                                                                                                                                                                                                                                                      | constitute <i>additional</i> duties and r<br>ption?                                                                                                                                                      | esponsibilities since the adoption of the                                                                                                                                 |
| If not, explain why the existing description is no longer accurate:                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                          |                                                                                                                                                                           |
| Are the job function                                                                                                                                                                                                                                                                                                                                 | ons described on this form current                                                                                                                                                                       | Elected Official/Department He                                                                                                                                            |
| Are the job function<br>department?<br>Job title                                                                                                                                                                                                                                                                                                     | ons described on this form current<br>s no If <i>yes</i> , name those job<br>n Service Officer/Director                                                                                                  | ly being performed by your office/<br>title(s) and classifications:<br>*Classification PAT B                                                                              |
| Are the job function<br>department?<br>Job title<br>Job title                                                                                                                                                                                                                                                                                        | ons described on this form current<br>sno If <i>yes</i> , name those job<br>n Service Officer/Director                                                                                                   | y being performed by your office/<br>title(s) and classifications:<br>*Classification<br>*Classification                                                                  |
| Are the job function<br>department?  ve<br>Job title<br>Job title<br>Job title                                                                                                                                                                                                                                                                       | ons described on this form current<br>sno If <i>yes</i> , name those job<br>n Service Officer/Director                                                                                                   | ly being performed by your office/<br>title(s) and classifications:<br>*Classification PAT B                                                                              |
| Are the job function<br>department? Vereral<br>Job title Veteral<br>Job title<br>Job title<br>* Current classified<br>another position.<br>Is this request a re                                                                                                                                                                                      | ons described on this form current<br>s no If yes, name those job<br>n Service Officer/Director<br>cation of position may be impacted<br>sult of new legislation, a mandate<br>ute citation and/or case: | ly being performed by your office/<br>title(s) and classifications:<br>*Classification<br>*Classification<br>*Classification<br>by the creation of or reclassification of |

7. If you answered *yes*, to question 6, are there existing technologies that could lessen the volume for this or related positions? yes no If *yes*, please describe, including estimated costs:

N/A

8. State specifically how creation of a new position/added employee/reclassification of this position would benefit the County:

By making this job description change, the office will better be able to serve our veterans and families by

adding the requirements for accreditation. Additionally the added requirement of our reach and community involvement will allow our office to better serve our clients by increasing our education and our reach efforts,

# **AUTHORIZATION BY EMPLOYEE:**

Signature of employee(s) assigned to the position being considered for reclassification.

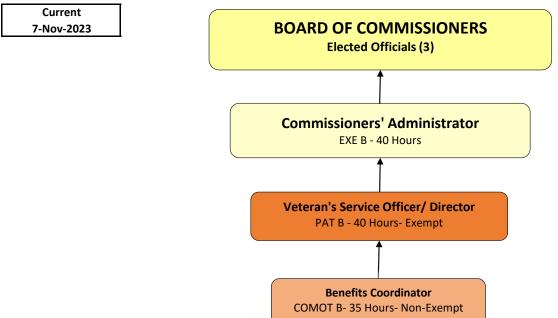
I understand that this request in no way jeopardizes my employment, and that if the reclassification review proceeds, it may result in the position being upgraded, downgraded, or remaining classified the same.

|                                                                                                  | 10/04/2023      |
|--------------------------------------------------------------------------------------------------|-----------------|
| Employee signature                                                                               | Date            |
| AUTHORIZATION BY APPOINTING AUTHORITY:<br>Signature required by Elected Official/Department Head |                 |
| I have reviewed this reclassification request with the employee(s), and                          | Agree disagree. |

If *disagree*, please comment:

I understand this request is subject to an organizational assessment of my office/department employment operations, and that I will be available to personally participate and provide requested information to the County Council, Personnel Administration Committee, and consultants of the Council.

|                                               | 10/04/2023 |
|-----------------------------------------------|------------|
| Signature of Elected Official/Department Head | Date       |
| STEVEN MILLER (Affiliate)<br>                 |            |
| Name typed or printed Steven Miller           |            |



# VETERAN'S AFFAIRS DEPARTMENTAL ORG CHART DETAIL



# PERSONNEL ADMINISTRATION COMMITTEE

Monroe County Courthouse, Room 306 100 W Kirkwood Avenue Bloomington, Indiana 47404 Office: 812-349-7312 CouncilOffice@co.monroe.in.us Peter Iversen, Chair Marty Hawk Geoff McKim

# PERSONNEL ADMINISTRATION COMMITTEE Summary Minutes Tuesday, October 3, 2023 at 12:00 PM (Noon) HR-Council Conference Room and Zoom Connection

#### **MEMBERS**

Present – IN PERSON – Peter Iversen, Chair Present – IN PERSON – Marty Hawk Present – IN PERSON – Geoff McKim

#### **STAFF**

Present – IN PERSON – Kim Shell, Council Administrator Present – IN PERSON – Molly Turner-King, County Legal Present – IN PERSON – E Sensenstein, Personnel Administrator

# 1. CALL TO ORDER

Iversen called the meeting to order at 12:01 pm. All PAC members were present in person in the HR-Council Conference Room.

# 2. ADOPTION OF AGENDA 12:01 PM

No changes.

# 3. SURVEYOR'S OFFICE, Trohn Enright Randolph 12:02 PM Review of WIS Recommendation -Survey Technician

Trohn Enright Randolph, Surveyor, spoke on the WIS recommendation for the Survey Technician position. He is satisfied with their review and recommendation to a PAT B, Non-Exempt.

McKim moved that PAC forward the updated Survey Technician job description and classification as a PAT B, Non-Exempt, to the Council. Hawk seconded.

Iversen asked for a Voice Vote:McKimYesHawkYesIversenYesMotion passed; 3-0; Unanimous

# 4. YOUTH SERVICES BUREAU, Vanessa Schmidt 12:05 PM Review of WIS Recommendation -Data Specialist

Vanessa Schmidt, YSB Deputy Director, spoke in support of the WIS recommendation for the Data Specialist as a PAT B, Non-Exempt.

McKim moved that PAC forward the updated Data Specialist job description and classification as a PAT B, Non-Exempt, to the Council. Hawk seconded.

Iversen asked for a Voice Vote:McKimYesHawkYesIversenYesMotion passed; 3-0; Unanimous

Α.

# 5. HEALTH DEPARTMENT, Lori Kelley 12:07 PM

Review of WIS Recommendation -Behavioral Health and Wellness Coordinator

Lori Kelley, Health Administrator, spoke in support of the WIS recommendation for the Behavioral Health & Wellness Coordinator as a PAT C, Non-Exempt.

McKim moved that PAC forward the job description for the Health Department Behavioral Health and Wellness Coordinator, classified as a PAT C, Non-Exempt, to the Council.

Iversen asked for a Voice Vote:McKimYesHawkYesIversenYesMotion passed; 3-0; Unanimous

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# B. Request to Create a New Position

-Public Health Response Liaison

The Department is requesting approval of a position that will be needed to provide services under the new core service requirements as part of the new state funding Health First Indiana.

Kelley spoke on the request for a new position for a Public Health Response Liaison. The correct title for this position is Public Health Liaison.

McKim moved that PAC forward the questionnaire for the Public Health Liaison to WIS for classification. Iversen seconded.

Α.

# 6. HIGHWAY DEPARTMENT, Lisa Ridge 12:23 PM

#### **Review of WIS Recommendation** -Highway Administrative Assistant

Lisa Ridge, Highway Director, spoke on the WIS recommendation for the Highway Administrative Assistant as a COMOT D, Non-Exempt. PAC discussion ensued.

McKim moved that PAC forward the updated Highway Administrative Assistant job description and classification as a COMOT D, Non-Exempt, to Council. Hawk seconded.

Iversen asked for a Voice vote:McKimYesHawkYesIversenYesMotion passed; 3-0; Unanimous

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B. Request to Amend Position Descriptions -Highway Director -Highway Superintendent

The Department is requesting the reclassification of two (2) positions to fix the organizational flow of the department. Currently, the Highway Director is classified as an EXE B. The Department currently has two positions classified at EXE A, Highway Superintendent and MS4 Coordinator. The Superintendent is responsible for management of the department under the Director, especially in the absence of the Director. The request is for the Director to be reclassified as an SO (no salary change request) and for the Superintendent to be reclassified as an EXE B, with the MS4 Coordinator remaining as an EXE A. The only salary increase involved in the request is the reclassification of the Superintendent from an EXE A to an EXE B. The Department can financially support this increase. The Commissioners and Legal Department agree with the proposed changes.

Ridge spoke on the reclassification of two positions: Highway Director and Highway Superintendent. PAC discussion ensued.

McKim moved that PAC forward to Council the recommendation to move the Highway Director from EXE-B to SO (Special Occupation) and to move the Highway Superintendent from EXE A to EXE B. Hawk seconded. This will be forwarded to WIS for informational purposes.

Iversen asked for a Voice vote:McKimYesHawkYesIversenYesMotion passed; 3-0; Unanimous

# 7. CLERK'S OFFICE, Nicole Browne 12:32 PM Request for a Second Review of Position Description -Election Supervisor

On June 13th, Council approved WIS conducting a desk audit of the Election Supervisor position due to the difficult of retaining employees. On July 12th a zoom meeting was conducted between WIS and the Chief Deputy. Following the audit, WIS forwarded a description to the Clerk for review. The Clerk is requesting to amend the title and to update the description to include additional responsibilities and education requirements.

Nicole Browne, Clerk, could not be present. Ryan Herndon, Election Supervisor, read a statement from Clerk Brown on her behalf to PAC regarding the WIS response to the desk audit of the Election Supervisor.

McKim moved to forward to WIS the updated job description for the Election Director, including the statement on project management requirements. Hawk seconded.

Iversen asked for a Voice vote:McKimYesHawkYesIversenYesMotion passed; 3-0; Unanimous

# 8. JAIL/CORRECTIONAL CENTER, Kyle Gibbons and Jordan Miller 12:39 PM Request to Create New Positions

The Department is requesting eight (8) correctional facility transition team members in order to effectively transition the correctional facility. These members will be led by the Correctional Facility Transition Team Director. The duties and responsibilities of this position would mirror that of a correctional officer.

Phil Parker, Chief Deputy, and Jordan Miller, Jail Financial Manager, spoke on the request and requested PAC's input on next steps.

This is not a PAC issue. Chief Deputy Parker will work with Kim Shell to get this on the Council's agenda.

# 9. APPROVAL OF SUMMARY MINUTES AS PRESENTED -September 5, 2023

#### No changes.

10. ADJOURNMENT 1:05 PM

The Summary Minutes of the Personnel Administration Committee (PAC) held on **October 3, 2023** were presented and approved on **November 7, 2023**.

# PERSONNEL ADMINISTRATIVE COMMITTEE

| Aye     | □Nay | Abstain | Not Present_  | Peter Iversen, PAC Chair |
|---------|------|---------|---------------|--------------------------|
| Aye     | Nay  | Abstain | □Not Present_ | Marty Hawk, Councilor    |
| ПАуе    | □Nay | Abstain | □Not Present_ | Geoff McKim, Councilor   |
| ATTEST: |      |         |               |                          |

Catherine Smith, Auditor Monroe County, Indiana Date