



Course 400 – Assessment Administration

Course Description

Course 400 provides fundamental management concepts for management and supervisory personnel in the assessor's office. The course begins by emphasizing the need for management, and the various roles placed on the assessor and all supervisory personnel. The course then introduces the four major management functions (planning, organizing, directing, and controlling). Although the four functions are interrelated, a separate chapter is devoted to each one. This provides for a greater understanding of the major functions. Topics such as setting goals and objectives, and budget development are included in Chapter 2. The major topics for Chapter 3 are such things as developing the structure for the organization, division of tasks, and developing comprehensive job descriptions. Chapter 4 addresses directing the organization and the major topics deal with leadership and motivational strategies. Chapter 5 addresses controlling and the major topics focus on personnel issues and ensuring that the objectives established in the planning stage are being accomplished. Chapter 6 provides a brief introduction to public relations, with the major topics being recommendations for improving a jurisdiction's public image.

Objectives

Upon completion of Chapter 1, you will be able to:

- Understand that all assessment jurisdictions, large or small, are expected to provide leadership, make decisions, and get results.
- Be familiar with the attributes of an effective assessment system.
- Identify the role of the assessor in an effective assessment system.
- Understand the need for management in an organization.
- Understand the meaning of management.
- Know the basic managerial functions.
- Understand the different levels of management.
- Understand the various roles of a manager.
- Know the different management skills.

Upon completion of Chapter 2, you will be able to:

- Understand that planning is the process of determining how an organization can accomplish its goals and objectives.
- Allocate resources effectively and efficiently.
- Determine the status of your organization.
- Define and develop a mission statement for the assessor's office.
- Develop a strategic plan that encompasses the organization's future course.
- Develop operational plans for the accomplishment of specific tasks.
- Develop written objectives, to be included in the operational plans that contain quantitative measurable terms, stating the results to be achieved within a given time frame.

- Utilize scheduling tools in developing and implementing a plan.
- Determine personnel requirements and time allocation for various tasks.
- Have a basic understanding of the different types of budgets.
- Be familiar with some strategies necessary for a good budget presentation.

Upon completion of Chapter 3, you will be able to:

- Understand how the coordination of efforts and activities fits into the management function.
- Develop an organizational structure by allocating responsibilities, specifying lines of authority, and providing for horizontal and vertical communication.
- Recognize internal and external factors that influence the assessor's office.
- Develop divisions within the office utilizing functional division or geographic division.
- Analyze task requirements and develop staffing patterns that maximize the efficiency of the division of labor.
- Develop performance standards, including standards for quality and production standards.
- Develop a personnel policy manual that contains the rules, jurisdictional policies, an organization chart, and any other pertinent policy information.
- Develop an organization chart that shows the division of work and the functional chain of command.
- Develop a clear and comprehensive job description.
- Know the proper steps to follow in new employee selection.
- Know the different methods of compensation and the advantages and disadvantages to each one.

Upon completion of Chapter 4, you will be able to:

- Understand the process of appropriately guiding the activities of the assessor's office in order to accomplish objectives.
- Define leadership and be able to contrast with directing.
- Identify the most effective approach of today's leaders.
- Understand the relationship of leadership with management, and how managers can become better leaders.
- Define and understand the degrees of delegation and know how to use this management tool.
- Define motivation and understand the primary components of motivation.
- Understand the various aspects of motivation.
- Understand the basics of communication.
- Define upward, downward, horizontal, and lateral communication.
- Understand the various aspects of empathic listening.
- Recognize the importance of effective listening for the assessor/manager.

Upon completion of Chapter 5, you will be able to:

- Understand the general process of evaluating current operations in an assessor's office.
- Understand that performance evaluation must be based on predetermined objectives.
- Develop an effective system for evaluating employee performance.
- Take the appropriate steps in addressing employee grievances.
- Use the proper procedures when disciplining an employee.
- Know when to terminate, and how to effectively terminate an employee.
- Effectively control the quality of the assessment process.
- Understand sales ratio study statistics, and the various applications of ratio study statistics.
- Understand the use of Geographic Information Systems (GIS) with ratio study data.
- Know the advantages and disadvantages of placing assessment data on a website.

Upon completion of Chapter 6, you will be able to:

- Develop methods by which the assessor’s office can promote favorable relationships with the public.
- Understand how a fair, open, and efficient administration fits into a public relations program.
- Understand how to utilize the various publics served by the assessor, as a positive communications network that informs the general public about the assessor’s office.
- Utilize the employees of the office as public relations people.
- Communicate and translate technical information relative to the assessor’s office into meaningful news data.
- Provide information to the news media in the traditionally summarized format.
- Take a proactive approach to public relations.
- Use your web site for public relations.
- Develop printed information to inform the public of the responsibilities of the assessor’s office.
- Prepare for speaking engagements, which provide another avenue of access to the public.
- Develop a more cooperative relationship with other public officials.

Timetable

Topic	Time Requirement	Day Covered
Chapter 1		
Introduction	10 Minutes	Monday AM
Attributes of an Effective Assessment System	15 Minutes	Monday AM
Role of the Assessor	15 Minutes	Monday AM
Management from the Past	20 Minutes	Monday AM
Perspectives of Management	15 Minutes	Monday AM
Why Managers are Needed	10 Minutes	Monday AM
What is Management	15 Minutes	Monday AM
Management Roles	10 Minutes	Monday AM
Necessary Management Skills	10 Minutes	Monday AM
Current Management Trends in the Private Sector	15 Minutes	Monday AM
Review Questions	30 Minutes	Monday AM
Chapter 2		
Planning Defined, Context of Planning, Basic Terms	15 Minutes	Monday AM
Purpose of Planning	15 Minutes	Monday AM
Current Status of the Organization	30 Minutes	Monday AM
The Planning Process	75 Minutes	Monday PM
Visual Aids for Planning and Scheduling	15 Minutes	Monday PM

Topic	Time Requirement	Day Covered
Determining Personnel Requirements	75 Minutes	Monday PM
Budgeting, Budget Types, Budget Presentation	15 Minutes	Monday PM
Review Questions	30 Minutes	Monday PM/Tuesday AM
Chapter 3		
Definition of Organizational Structure	15 Minutes	Tuesday AM
Factors to Be Considered in the Organization's Structure	30 Minutes	Tuesday AM
Development – Organization Charts	45 Minutes	Tuesday AM
Statement of Duties and Responsibilities	20 Minutes	Tuesday AM
Development and Uses of a Job Description	30 Minutes	Tuesday AM
New Employee Selection and Development	30 Minutes	Tuesday AM
Employee Compensation	20 Minutes	Tuesday AM
Problem 3-1	225 Minutes	Tuesday AM/PM
Review Questions	20 Minutes	Tuesday PM
Quiz 1	30 Minutes	Wednesday AM
Review Questions	30 Minutes	Wednesday AM
Chapter 4		
Definition of Directing	15 Minutes	Wednesday AM
Definition and Discussion of Leadership	30 Minutes	Wednesday AM
Leadership's Relation with Management	30 Minutes	Wednesday AM
How Managers Can Become Better Leaders	30 Minutes	Wednesday AM
Delegation	45 Minutes	Wednesday AM
Motivation	60 Minutes	Wednesday AM/PM
Communication	60 Minutes	Wednesday PM
Listening – Empathetic Listen	30 Minutes	Wednesday PM
Listening As an Important Facet of Management	30 Minutes	Wednesday PM
Review Questions	75 Minutes	Wednesday PM
Chapter 5		
The Control Process	15 Minutes	Wednesday PM

Topic	Time Requirement	Day Covered
Performance Evaluation	60 Minutes	Wednesday PM/Thursday AM
Grievances & Discipline	45 Minutes	Thursday AM
Controlling the Quality of the Assessment Process	30 Minutes	Thursday AM
Controlling the Quality of the Product	90 Minutes	Thursday AM
Various Uses of GIS	15 Minutes	Thursday AM
Placing Assessment Data on the Web	15 Minutes	Thursday PM
Review Questions	10 Minutes	Thursday PM
Chapter 6		
Definition of Public Relations	15 Minutes	Thursday PM
Assessor/Manager in Public Relations	15 Minutes	Thursday PM
The Assessor's Public	15 Minutes	Thursday PM
Planning a Public Relations Program	60 Minutes	Thursday PM
Cooperation with Other Public Officials	15 Minutes	Thursday PM
Review Questions	30 Minutes	Thursday PM
Quiz #2	30 Minutes	Thursday PM