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GENERAL PLANNING CONSULTANT:

TECHNICAL MEMORANDUM 88.4.4

STAFF REQUIREMENTS AND BUDGET FOR UPDATING
THE BENEFIT ASSESSMENT MOS-I DATA BASE

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Southern California Rapid Transit District

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STAFF REQUIREMENTS AND BUDGET FOR UPDATING THE BENEFIT ASSESSMENT DATA BASE

The initiation of Benefit Assessment Districts will require a staff to update and maintain the Benefit Assessment data base. This Technical Memorandum provides estimates of the manhours anticipated to update and maintain the data base. The exact time commitments for each task in updating the data base the first year cannot be anticipated with great accuracy. The amount of time needed to update the data base the first year may also be greater due to the "learning curve." Once the staff becomes familiar with the process, the amount of staff time needed to review, analyze and enter the data should be less.

It is anticipated that a portion of the time of three professional planners will be needed to update and maintain the Benefit Assessment data base. The Sr. Planner will supervise and oversee the task area and coordinate the changes to the data base resulting from appeals and yearly updates. The planner will compile and review the data necessary for updating the data base from changes in assessments resulting from changes of land use, ownership, etc. The planning assistant will be responsible for field surveys, monitoring permits and other public records, and researching data for updating of the data base. All staff should be familiar with the various processes so that resources can be shifted depending on needs. Position descriptions for these personnel which delineate their responsibilities in updating the Benefit Assessment data base are contained in the following pages.

SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT

SENIOR PLANNER

BASIC FUNCTION

Under moderate supervision, performs advanced professional planning duties, serves as a team leader for a work group or project team and performs other related work.

CLASSIFICATION CHARACTERISTICS

Differs from Supervising Planner in that Senior Planner designs and implements planning projects independently or within a specialized unit and serves in a lead capacity for a work group or project team, while Supervising Planner serves as a first-level supervisor for a specialized unit. Differs from Planner in that Senior Planner takes the lead in project design and has a significant training role within the unit while Planner performs journey-level planning work.

Supervision Received From: Supervising Planner

EXAMPLES OF DUTIES

Assures that all procedural requirements are fulfilled and that all deadlines are met.

Coordinates with other SCRTD Departments, the County Assessor's office and city and county agencies to assure that necessary information is provided and received.

Interprets and applies District policies and procedures to updating the data base.

Writes and modifies computer programs and uses packaged computer routines needed to maintain the data base for Benefit Assessments and for use in the analysis of assessments and appeals.

Coordinates preparation of a complete and accurate tape of Benefit Assessments to be delivered to the Tax Assessor.

Plans, organizes, assigns and reviews work related to assigned projects and studies as a team leader and project manager.

Provides on-the-job training to co-workers.

REQUIRED KNOWLEDGE AND ABILITIES

Knowledge of modern theories, principles and practices of urban and transportation planning, federal, state and local government transportation policies and regulations and statistics. Ability to set priorities and meet goals, apply planning procedures to technical projects, research, organize and analyze data, communicate effectively orally and in writing.

DESIRABLE QUALIFICATIONS

Any combination of training, education and experience which demonstrates the ability to perform the duties of the position. A bachelors degree in urban planning, economics, or a related field and three years journey-level experience in urban transportation planning involving the application of systems planning, economics, statistical methods, interpreting architectural plans or land use planning methods are preferred.

SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT

PLANNER

BASIC FUNCTION

Under moderate supervision, performs professional planning duties related to benefit assessment districts and performs other related work.

CLASSIFICATION CHARACTERISTICS

Differs from Senior Planner in that the Planner performs planning work under the direction and technical supervision of a higher level professional while Senior Planner performs advanced planning work and serves in a lead capacity for a work group or project team. Differs from Planning Assistant in that Planner performs journey-level planning work while Planning Assistant performs less complex planning duties and receives close supervision and training from higher-level planning professionals.

Supervision Received From: Supervising Planner and Senior Planner

EXAMPLES OF DUTIES

Under supervision of Sr. Planner, interprets and analyzes data collected and finalizes for entry into Benefit Assessment data base records.

Reviews and oversees data collection activities, including field survey and building and safety records.

Compares and reconciles Benefit Assessment data base with updated Assessor's data.

Verifies completeness and accuracy of Benefit Assessment data base and prepares data base for conversion to computer tape.

Uses packaged computer routines for the analysis of the Benefit Assessment data base.

Conducts site inspection of property and structures to update Benefit Assessment data base.

Compiles reports and data summaries based upon Benefit Assessment data base.

REQUIRED KNOWLEDGE AND ABILITIES

Knowledge of modern theories, principles and practices of urban and transportation planning, federal, state and local government transportation policies and regulations, and statistics. Ability to interpret building plans and related public records, research, organize and analyze data, communicate effectively orally and in writing and prepare graphs.

QUALIFICATIONS

Any combination of training, education and experience which demonstrates the ability to perform the duties of the position. A bachelors degree in urban planning, economics or a related field and two years journey-level experience performing urban transportation planning involving the application of systems planning, economics, interpreting architectural plans or land use planning methods are preferred.

SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT

PLANNING ASSISTANT

BASIC FUNCTION

Under close supervision, learns by assisting in the review and analysis of Benefit Assessment program and performs other related work.

CLASSIFICATION CHARACTERISTICS

Differs from Planner in that Planning Assistant learns and assists in carrying out portions of District planning projects, while Planner performs journey-level work.

Supervision Received From: Supervising Planner or Planning Manager

EXAMPLES OF DUTIES

Operates microcomputer to apply packaged programs to data.

Makes data entries to update Benefit Assessment data base.

Researches files from city and county agencies to obtain information to maintain and update the data base.

Performs field surveys.

Compiles and evaluates data and prepares drafts of parcel record updates.

Codes information into microcomputer and verifies output.

REQUIRED KNOWLEDGE AND ABILITIES

Knowledge of basic research methods, techniques, and practices, urban planning principles and practices. Ability to learn urban mass transit planning principles, methods and practices, compile and analyze data, apply packaged programs to perform analysis on microcomputer, personal computer, and mainframe terminal, calculate basic statistics and communicate effectively both orally and in writing.

DESIRABLE QUALIFICATIONS

Any combination of training, education and experience which demonstrates the ability to perform the duties of the position. A Bachelors degree in Planning, Architecture or related field is preferred.

STEPS FOR UPDATING THE HOS-1 BENEFIT ASSESSMENT DATA BASE
WITH AN ESTIMATE OF HOURS BY TASK

It is assumed that monitoring procedures and deadlines, coordinating assignments and organizing workflow will take about 8 person hours per week; or about 1/5 of a Sr. Planner.

A. Comparison of the Benefit Assessment data base with a current version of the Assessor's data

1. Monitor acquisition of data (computer tapes and microfiche), downloading and data conversion of computer tape data to microcomputer diskettes. Two computer tapes and 1 set of microfiche per year.

Planning Assistant 10 hrs

2. Compare the working version of the Benefit Assessment data base with the updated Assessor's Secured Basic File Abstract (computer tape). Two computer tapes per year.

Planner 40 hrs
Planning Assistant 60 hrs

3. Compare the working version of the Benefit Assessment data base with the Assessor's Cross-Reference Roll (microfiche). One copy per year.

Planning Assistant 40 hrs

4. Research and reconcile the Assessor's current data with the working version of the Benefit Assessment Data Base to produce an updated parcel list. Two times per year.

Planner 30 hrs
Planning Assistant 80 hrs

5. Research and reconcile the Assessor's current data with the working version of the Benefit Assessment Data Base to update the portion of the working data base comprising the master mailing list. Two times per year.

Planner 40 hrs
Planning Assistant 80 hrs

B. Review of Building Permit Activity

1. Review monthly reports of building activity to monitor structural changes occurring within the districts.

Screening reports 4 hours per month = 48 person hours

Planning Assistant 48 hrs

2. Review and analyze Building Permit data.

Approximately 100 permits would be expected to be identified for further review at the Department of Building and Safety after step B1 has been completed. An average of 20 permits can be reviewed per hour.

5 hrs per month times 12 = 60 person hours

Planner	10 hrs
Planning Assistant	50 hrs

3. Conduct field survey and other supporting research.

Approximately 20 % of the permits in step B2 will require further research with an average of 1 hour per permit.

20 hrs per month times 12 months = 240 person hours

Planner	60 hrs
Planning Assistant	180 hrs

C. Recalculation of Benefit Assessments and Data Entry

Planner	40 hrs
Planning Assistant	40 hrs

E. Preparation of Computer Tapes and Hard Copy for submitting Benefit Assessment to the Auditor-Controller

Planner	80 hrs
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BENEFIT ASSESSMENT DATA BASE UPDATING BUDGET

The following is an approximate annual budget for the staff needed to administer the Benefit Assessment data base updating and maintenance on a continuing basis throughout the year.

STAFF

Senior Planner

1/5 times \$43,116 = \$ 8,623

Planner

300 person hrs times 18.75/hr = \$ 5,625

Planning Assistant

588 person hrs times 16.25/hr = \$ 9,555

Total estimated annual labor budget for updating the Benefit Assessment data base \$23,803