


Memorandum



Date: September 26, 2007

To: Honorable Chairman Bruno A. Barreiro
and Members, Board of County Commissioners

From: 
Carlos Alvarez
Mayor

Subject: Mayoral Appointment – Property Appraiser

Pursuant to the authority vested in me under the provisions of Sections 2.02 C and D of the Miami-Dade County Home Rule Charter, I hereby appoint Marcus Saiz de la Mora to the position of Property Appraiser.

In 1984, Mr. Saiz de la Mora began his career as a Real Estate Evaluator I, and since then has been promoted to various technical and supervisory positions in the Department including Deputy Director and Interim Property Appraiser since January 1, 2007. In his various capacities, Mr. Saiz de la Mora has acquired the leadership skills and accumulated substantial knowledge in the field of mass appraisal to ensure that the tax rolls produced by Miami-Dade County meet or exceed all statistical and procedural requirements necessary for assessment roll certification by the Florida Department of Revenue (FDOR). In the past year, as Interim Property Appraiser, he led the Department in the data gathering, roll analysis, preparation, and submission of the assessment roll to FDOR by the July 1 statutory date. The 2007 assessment roll exceeded FDOR requirements, and FDOR certified the Miami-Dade County 2007 roll on July 20, 2007. On August 22, 2007 over 955,000 Notices of Proposed Property Taxes were mailed to Miami-Dade County property owners.

Mr. Saiz de la Mora played a vital role in tracking and analyzing the impacts of all the Florida House and Senate tax reform bills during this past year's regular and special legislative sessions. He was instrumental in providing the County, municipalities, and taxing authorities with essential preliminary assessment roll information to accurately estimate the assessed value and fiscal impact of the various proposed bills. Additionally, to inform property owners on the newly passed tax reform bill (HB 1B), he has, in a collaborated effort with various County departments, provided property owners with information to determine the individual effects of this bill through the homestead exemption comparison estimator on the County's website.

Mr. Saiz de la Mora has also worked to enhance the Department's efforts to educate the public on the Property Appraiser's statutorily mandated functions, focus on completing the implementation of the Computer Aided Mass Appraisal system, develop a department-wide staff training program on roll preparation and certification, and improve customer service.

Please join me in congratulating Mr. Saiz de la Mora. His resume and charge memorandum from the County Manager is attached for your reference.

Attachments

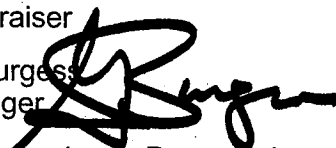
c: Honorable Harvey Ruvin, Clerk, Circuit and County Courts
Honorable Joseph P. Farina, Chief Judge, Eleventh Judicial Circuit
Honorable Kathy Fernandez-Rundle, State Attorney
Honorable Bennett Brummer, Public Defender
Robert A. Cuevas, County Attorney
George M. Burgess, County Manager
Denis Morales, Chief of Staff, Office of the Mayor
Marvin O'Quinn, President, Public Health Trust
Robert Meyers, Executive Director, Commission on Ethics and Public Trust
Christopher Mazzella, Inspector General

Memorandum



Date: September 26, 2007

To: Marcus Saiz de la Mora
Property Appraiser

From: George M. Burgess
County Manager 

Subject: Charge Memorandum – Property Appraiser

Congratulations on your permanent appointment as Miami-Dade County's Property Appraiser. Over the past year you have demonstrated tremendous leadership and teamwork skills that I expect for you to continue in your permanent position.

As a veteran in the department, you have developed the necessary skills to run the day-to-day operations of the department; however, I task you with accomplishing these key objectives during your tenure:

- Continue the aggressive tracking and analyzing all legislative items that will impact the County and bring them to the immediate attention of the Office of Strategic Business Management and this office;
- Develop the Workplan to comply with the five-year re-inspection mandate per Florida Statue 193.023;
- Expand on our customer focused and user-friendly initiatives like the Department's partnership with 3-1-1 and the advancements to the Property Appraiser's website to improve customer service, such as the electronic filing of exemptions and tangible personal property tax returns;
- Continue the Department's efforts to outreach and educate the public on the Property Appraiser's statutorily mandated functions;
- Complete implementation of the Computer Aided Mass Appraisal (CAMA) system;
- Continue to curb tax exemption abuses, and engage as a key member of the Mayor's Mortgage Fraud Taskforce; and
- Ensure that Property Appraiser staff is adequately and continuously trained to ensure annual compliance with roll assessment and certification.

As Interim Director, you lead the department through an unprecedented year and I expect that we will continue to experience challenges in the future. I have no doubt that you will continue to advance the goals I have set forth for you, and tackle any issues that arise during the course of the year. On behalf of our entire management team, I wish you the best in this endeavor.

c: Honorable Carlos Alvarez, Mayor
Denis Morales, Chief of Staff, Office of the Mayor
Cynthia W. Curry, Senior Advisor to the County Manager

RESUME

Marcus Saiz de la Mora
Tel. No.: (305) 375-4008
E-mail: jmp@miamidade.gov

QUALIFICATIONS:

Professional executive manager and designated property appraiser with over 23 years experience in the field of mass appraisal. Specialized skills in the preparation of annual property tax rolls and meeting Florida Department of Revenue (FDOR) statistical and procedural review requirements. Proficient at effectively leading, managing and directing over 280 employees engaged at all levels of the Florida ad valorem property tax process. Possess a thorough understanding of applicable Florida Statutes, Department of Revenue Rules and Regulations and a comprehensive understanding of property valuation theory and the tax exemptions afforded to property owners under Florida law.

PROFESSIONAL EXPERIENCE:

January 1, 2007 to Present
Interim Property Appraiser
Miami-Dade County

As interim Property Appraiser, direct and oversee all policy, management and operational aspects of the County's Property Appraisal Department in accordance with the State of Florida's Constitution, Statutes and Department of Revenue Rules and Regulations. Responsible for the production of the County's property assessment roll based on a valuation date of January 1 reflecting market value. Successfully directed the analysis, review, production, completion and submission of the 2007 assessment roll to the FDOR by the July 1st statutory date. The 2007 Miami-Dade County assessment roll is the State's largest and most complex, with a taxable value of \$245.3 billion and containing more than 955,000 real and tangible personal property parcels. The Department's operational budget is \$25.2 million employing a current staff of 283.

Challenged staff at the outset of the interim appointment to refocus on improving work product quality and enhancing the equity of the roll by setting stretch goals exceeding the FDOR statistical equity measures of coefficient of dispersion (COD) and price related differential (PRD). Results exceeded FDOR minimum requirements and culminated with the FDOR's July 20th roll approval and certification.

Formed an integral part of the County's team assisting with the analysis and assessed value impact for the numerous legislative tax reform bills proposed during the 2007 legislative sessions. Collaborated with County Departments to provide Miami-Dade County residents with information to determine individual effects of the 2007 legislative Tax Reform bill HB 1B. Provided a detailed question and answer outline on HB 1B and deployed a Homestead Exemption Comparison Estimator on the County's web site. Enhanced the Department's efforts to inform the public on the Property Appraiser's statutorily mandated functions by aggressively increasing the Department's presence at community outreach events, attending professional and industry related speaking opportunities and partnering with the County's 311 Answer Center and other County departments to provide critical assessment and property tax exemption information to Miami-Dade County residents.

July 2005 to December 2006
Deputy Property Appraiser
Property Appraisal Department, Miami-Dade County

Responsible for the assessment production process including: property inspections; construction cost analysis; sales and rental data acquisition; statistical financial and economic data analysis; application of appropriate methods of valuation; and consideration of statutory standards. Monitored production output and adjusted priorities each tax year to comply with Florida Department of Revenue statistical and procedural requirements. Additional responsibilities included community outreach meetings and informational conferences to industry professionals, and county residents regarding the property appraisal assessment process. The position requires comprehensive understanding of property valuation theory and the experience for proper application to real world scenarios.

January 1998 to June 2005
Director, Real Estate-Residential Division
Property Appraisal Department, Miami-Dade County

Responsible for preparing the division's yearly assessment cycle plan. Coordinated and planned the work and assessments of 2 division assistants, 5 support supervisors and 50 support staff members and approximately 403,000 parcels representing \$90.8 billion in market value throughout Miami-Dade County. Reviewed the Division's assessment policies and procedures for compliance with Department directives, Florida Statutes and Florida Department of Revenue rules. Coordinated meetings and conferences with the department's assistant county attorney and reviewed existing and new statutory requirements affecting real property assessments. Additional duties involved conferring with property owners or their legal representatives to explain assessment valuation methods relating to real property. Reviewed Value Adjustment Board reductions for possible circuit court challenge and assist legal counsel with property valuation and case preparation for court cases.

Implemented the table based "market" valuation system for new single family subdivisions. This system was previously developed within the Condominium Division. New residential subdivision "new construction" field operation efficiency was increased 10 fold. "Market" or total value parcels account for 75% of the division's yearly new construction.

Directed and co-developed with division staff and Department IS programmers the division's Field Tracking Database. System allows the tracking of all aspects of the division's field activity. Implementation and production began in mid 2004. The database facilitated the development of production measures and establishment of standards for the various types of field inspections.

Assisted in a team effort, with the development of a joint Property Appraisal Department, Clerk of the Courts and a private vendor, to create a paperless title (deed) transfer process. The system tracks all recorded property appraisal related documents. Recorded title transfers are processed electronically. System also tracks all clerical data entry related to the document. Eight core group clerks processed 104,000 2004 recorded deeds. Implementation and production began in the 4th quarter of 2003. Quantitative and qualitative production measures and standards were implemented.

April 1992 to December 1997
Director, Condominium Division
Property Appraisal Department, Miami-Dade County

Prepared the division's yearly assessment cycle plan. Coordinated and planned the work and assessments of 2 supervisory assistants, 14 support staff members and approximately 250,000 total value parcels totaling \$20.1 billion in value. Reviewed the division's assessment policies and

procedures for compliance with Department directives, Florida Statutes and Florida Department of Revenue rules. Coordinated meetings with the department's assistant county attorney and reviewed existing and new statutory requirements affecting real property assessments. Reviewed existing production standards and developed new standards and processes for the division's sections. Conducted market studies for total value assessments; assigned, directed and reviewed same. Additional duties involved selection of applicants for division positions, conferred with property owners or their legal representatives and explained assessment valuation methods relating to real property.

Directed and co-developed with staff and ITD programmers, the division's mainframe table based "market" valuation system for single family cluster and townhouse parcels. Implementation resulted in increased accuracy of property records, reduced paper flow and time to process assessment changes, allowed two clerks to process and edit the division's 1700 yearly new construction parcels. Developed and implemented "same day deed entry and on-line verification" procedures. Procedure allowed 7 Clerical staff employees to process 30,000 of the departments 67,000 yearly title transfers.

Coordinated and directed the division's storm damage assessment in south Miami-Dade County. Developed a bar coded "repair assessment" field inspection report. Process allowed one clerk to process all of the division's 60,000 "repair assessment" inspections.

Additional responsibilities included my assignment by the Department Director to a joint department and Department of Audit & Budget Management to study the department's IT systems and Real Estate Division clerical processes. The "as is" business processes were documented. Process constraints and improvement opportunities were identified and recommended.

July 1984 - March 1992

**Real Estate Evaluator I, II and Income Evaluation Specialist Real Estate Division
Property Appraisal Department, Miami-Dade County**

Primary Duties involved in-depth analysis of residential and commercial real estate properties throughout Miami-Dade County for ad valorem taxation purposes. Property analysis required using the three traditional approaches to value real estate. This entailed research and analysis of large dollar value real estate market transactions. In depth review and analysis of market information concerning commercial property rental rates, operating expenses and derivation of capitalization rates, and discounted cash flows. Research also involved comprehensive review of property leases for various types of commercial properties. Exercised considerable independent judgment for recommending appropriate market value for multi-million dollar properties. Additional duties included defending and explaining real property assessment criteria for the department's commercial property assessments before the Value Adjustment Board.

EDUCATION

1982 – 1985	FLORIDA INTERNATIONAL UNIVERSITY Bachelor of Arts in Economics Minor in Finance
1980 – 1982	MIAMI DADE COMMUNITY COLLEGE Associate Arts in Business Administration
1978 – 1979	WOFFORD COLLEGE, Spartanburg S.C. Transferred

1978

MIAMI CORAL PARK SENIOR HIGH SCHOOL
High School Diploma

COURSES: Various real estate appraisal courses and recertification.

CERTIFICATION: Certified Florida Appraiser (CFA)
Certified by the Florida Department of Revenue and approved
by Governor Charlie Crist.
(January 2007 to Present)

Driving Government Performance – Executive Education, November 2006
Harvard University, John F. Kennedy School of Government

Academy for Strategic Management
Florida International University/Miami-Dade County
(Completed 12/2001)

Executive Development Program
Florida International University/Miami-Dade County
(Completed 12/94)

Supervisor Certification Program
Metro-Dade County (Completed 3/94)

**DESIGNATIONS
ATTAINED:** Accredited Senior Appraiser (ASA),
American Society of Appraisers

Certified Florida Evaluator (CFE), Professional
Appraisers Association of Florida

LICENSE: Florida Real Estate Broker, License No. 0367920

AFFILIATIONS: Past President, National Association of Hispanic
Public Administrators (NAHPA)

Florida International University, Alumni Assoc.

Florida Youth Soccer Assoc., Licensed Soccer Coach

PERSONAL: Married, two children.

Fluent in English and Spanish.

Church member.

Hobbies: Soccer, Jogging, Fishing, Spectator Sports.