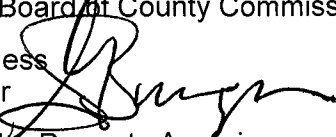


# Memorandum



**Date:** November 7, 2006

**To:** Honorable Carlos Alvarez, Mayor  
Honorable Chairman Joe A. Martinez  
and Members, Board of County Commissioners

**From:** George M. Burgess  
County Manager 

**Subject:** Resignation of the Property Appraiser

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Attached please find a letter from Mr. Frank Jacobs, Property Appraiser, who will be retiring from County service effective December 31, 2006. Frank has worked with the County for 30 years and has been the Property Appraiser since July 1, 2005.

I know you join me in expressing our sincere gratitude to Frank for his 30 years of outstanding service to this County. In addition, Frank has been very involved in developing targeted tax relief measures to help limit property value increases for affordable rental housing properties.

As Frank retires I have appointed Mr. Marcus Saiz de la Mora, Assistant Property Appraiser, as the Interim Property Appraiser for the County. Mr. Saiz de la Mora is a 23 year veteran of the Department of Property Appraisal and has accumulated a substantial level of knowledge of mass property appraisal techniques and Miami-Dade's appraisal processes. I have attached Marcus' resume for your reference.

## Attachments

c: Honorable Bennett Brummer, Public Defender  
Honorable Joseph P. Farina, Chief Judge, Eleventh Judicial Circuit  
Honorable Katherine Fernandez-Rundle, State Attorney  
Honorable Harvey Ruvin, Clerk, Circuit and County Courts  
Marvin O'Quinn, President and CEO, Public Health Trust  
Murray A. Greenberg, County Attorney  
Robert Meyers, Executive Director, Commission on Ethics and Public Trust  
Christopher Mazzella, Inspector General



DEPARTMENT OF PROPERTY APPRAISAL  
ADMINISTRATIVE DIVISION  
SUITE 710  
111 NW 1ST STREET  
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October 31, 2006

George Burgess  
County Manager  
Miami-Dade County  
111 NW 1<sup>st</sup> Street, 29<sup>th</sup> Floor  
Miami, Florida 33128

Mr. Manager;

After a great deal of contemplation and reflection, I have decided to retire from County service, effective December 31, 2006.

I would like to thank you and the Board of County Commissioners for the opportunity to serve as Miami-Dade County's Property Appraiser since my appointment on July 1, 2005. This opportunity has been the high point of my thirty year career with the County for a variety of reasons.

With your support, the Department of Property Appraisal has made tremendous progress over the past year in public service, education and outreach. Through our partnership with the 3-1-1 call center, more than 130,000 citizens have had their property assessment questions answered promptly and courteously. Using a combination of radio/TV interviews and more than forty presentations to citizen and professional organizations, we have endeavored to inform the citizens of Miami-Dade County about all property tax relief opportunities available to them.

I am proud of the efforts made by the Department to curb tax exemption abuses and provide assistance in the search for solutions to the affordable/workforce housing crisis. However, I am especially proud of the fact that these efforts were made while producing the largest assessment roll in the State's history during a period of unprecedented market value appreciation and complicated further with value reductions applied to 46,000 properties for hurricane damage.

The performance of this Department since I was appointed Director is a testament to the dedication and professionalism of the wonderful staff I have had the pleasure to work with for so many years.

I will assist in this transition in any way you deem appropriate.

Respectfully,

A handwritten signature in black ink, appearing to read 'Frank E. Jacobs', written over a large, stylized flourish.

Frank E. Jacobs  
Property Appraiser

cc: Cynthia W. Curry, Senior Advisor to County Manager

## RESUME

**MARCUS SAIZ DE LA MORA**

Tel. No.: (305) 375-4008

E-mail: jmp@miamidade.gov

### EMPLOYMENT HIGHLIGHTS:

#### **July 2005 to Present**

##### **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. Monitors production output and adjusts priorities each tax year to comply with Florida Department of Revenue statistical and procedural requirements. Additional responsibilities include 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 and 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 4<sup>th</sup> quarter of 2003. Quantitative and qualitative production measures and standards were implemented.

## **MARCUS SAIZ DE LA MORA**

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**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.

**MARCUS SAIZ DE LA MORA**

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**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:**   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:**   Accredited Senior Appraiser (ASA),  
American Society of Appraisers  
(ASA Member No. 018437)

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

**LICENSE:**           Florida Real Estate Broker, License No. 0367920

**AFFILIATIONS:**   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

Hobbies: Soccer, Jogging, Fishing, Spectator Sports