

STATE BOARD OF EQUALIZATION DUTY STATEMENT

CIVIL SERVICE CLASSIFICATION Business Taxes Specialist III		WORKING TITLE Technical Advisor to the Chief Deputy Director	
UNIT/DISTRICT/LOCATION Executive Office		POSITION NUMBER 290-301-4378-001	
SEERA DESIGNATION Rank and File	BARGAINING UNIT 01	WORK WEEK GROUP E	CERTIFICATES REQUIRED None
FIGNER PRINTS REQUIRED <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		SUPERVISION EXERCISED None	

Job Requirements

Knowledge of:

- General accounting and auditing principles and procedures, and business law.
- Specialized practices and procedures used in tax auditing, compliance and collection.
- Provisions of the tax laws and regulations administered by the State Board of Equalization, related legal opinions and court decisions, and departmental policies, rules and regulations.
- Principles of policy formulation and development, and personnel management techniques.
- Departmental administrative goals and policies.
- Principles, practices and trends of public administration, organization and management.
- Organization of the State Board of Equalization.
- Organization and functions of California state government, including the organization and practices of the Legislature, Executive Branch.
- Legislative and budgetary processes.
- Sales and Use Tax audit and compliance functions.

Ability to:

- Apply the required knowledge correctly and effectively.
- Interpret and apply Sales and Use Tax laws, regulations, and compliance and audit procedures objectively and without bias.
- Write technical analyses and letters having major tax program administration policy ramifications.
- Act as the highest level technical expert, providing guidance and advice on research techniques, law interpretation, and policy and procedures development.
- Work effectively under pressure; handle multiple tasks and numerous priority deadlines.
- Make effective presentations.
- Analyze data, situations, administrative policies, and organization procedures and practices accurately.
- Independently analyze complex and/or sensitive taxpayer Sales and Use Tax issues/complaints and take effective courses of action for resolution.
- Draw sound conclusions, and take effective action.
- Prepare clear and concise reports, policies, and legislation, including those related to unprecedented tax issues or programs.
- Communicate effectively, verbally and in writing, including making effective presentations and preparing clear and concise reports.
- Coordinate projects and extensive tracking systems.
- Create and maintain cooperative working relationships with elected officials, executive management, industry members, staff and the public at large.
- Work with confidential and politically sensitive material and maintain confidentiality.
- Independently coordinate and lead specific complex Board of Equalization projects.
- Represent the Chief Deputy Director at various meetings, conferences and with other agencies.
- Represent the Chief Deputy Director at Board hearings.
- Work in a high-rise building.

Statement of Position

Under the general supervision of the Chief Deputy Director, the Business Taxes Specialist III serves as the highest level technical resource on matters concerning Sales and Use Tax policy issues, including the analysis of legislation, the evaluation and development of tax policies and procedures for handling unprecedented tax issues, the development of tax policy for specific industries, and policy/procedure development and oversight responsibilities for precedent-setting tax issues. The nature of the issues may be politically sensitive or confidential. Coordinates and oversees enterprise agency wide projects on behalf of the Chief Deputy Director. Coordinates assignment tracking on behalf of the Chief Deputy Director, and serves as liaison for the Chief Deputy Director as directed.

Candidate must be able to perform the essential job functions (*) with or without reasonable accommodations.

PERCENTAGE OF TIME SPENT	DUTIES
40%	<p>*Serves as the highest level technical Sales and Use Tax specialist and advisor to the Chief Deputy Director. Serves as the liaison for the Chief Deputy Director with internal and external departments or agencies, Board Members, and the public; acts for the Chief Deputy Director as directed, and represents him in meetings, hearings, and conferences. Reviews material on behalf of the Chief Deputy Director and briefs the Chief Deputy Director on emerging issues within the Sales and Use Tax department or public sector that may affect the program area.</p> <p>*Participates in the development of departmental policies, procedures, practices and legislation. Provides consultations and presentations to executive, program, and legal management on the most sensitive and complex audit and compliance policies and procedures. Reviews completed assignments submitted by program areas, makes recommendations, and coordinates tracking and follow-up of assignments on behalf of the Chief Deputy Director to ensure timely submission.</p>
30%	<p>*Prepares or coordinates the preparation of reports on a variety of technical, fiscal, or Board Member requested subjects. Prepares or coordinates the preparation of reports for management, including analysis and recommendation, to assist in the development of more efficient means of administering the program. Coordinates and oversees enterprise agency wide projects on behalf of the Chief Deputy Director.</p>
15%	<p>*Drafts and reviews correspondence for the Chief Deputy Director and department management. Drafts, reviews, or coordinates development of agency level Budget Change Proposals, Feasibility Study Reports, Rules and Regulations, Training Programs, Audit and Compliance Manuals, Operations Memorandums or other policy documents. Act as team leader on various projects, both in and outside the Board of Equalization. Perform other duties of a highly technical, time-critical and/or politically sensitive nature.</p>
10%	<p>*Advocate the position of the tax program before the elected Board of Equalization members as directed by the Chief Deputy Director. Handles constituent issues directed from Board Members' offices and creates and maintains goodwill in negotiating sensitive contacts with taxpayers and elected officials. Acts authoritatively with management, taxpayers, and other professional entities and their staff as directed by the Chief Deputy Director.</p>
5%	<p>Performs/coordinates miscellaneous projects as requested by the Chief Deputy Director. As needed, performs other job related duties to cover workload. (5%)</p>

* These job duties are essential in performing the work functions as a Business Taxes Specialist III.

I have read this duty statement and fully understand my assigned duties.

EMPLOYEE'S SIGNATURE

DATE

I have reviewed these duties with the above named employee.

SUPERVISOR'S SIGNATURE

DATE