

STATE BOARD OF EQUALIZATION DUTY STATEMENT

CIVIL SERVICE CLASSIFICATION Information Officer II		WORKING TITLE Information Officer II	
UNIT/DISTRICT/LOCATION Outreach Services Division		POSITION NUMBER 290-343-5595-XXX	
SEERA DESIGNATION	BARGAINING UNIT S01	WORK WEEK GROUP E	CERTIFICATES REQUIRED NONE
FINGERPRINTS REQUIRED <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		SUPERVISION EXERCISED No	

Job Requirements

Knowledge of:

- Principles, practices, and trends of public and business administration including supportive staff services
- Microsoft Excel/Word/Access/Acrobat/PowerPoint
- Program and project management techniques
- Taxpayer education products – forms, publications, notices, newsletters, presentations, etc
- Techniques and processes required to plan, write, edit, design, produce and disseminate information.
- Public speaking techniques
- Administration of the department's goals and policies
- Department's Equal Employment Opportunity objectives

Ability to:

- Use tact and good judgment in dealing with the public under stressful situations
- Consult with and advise Board Members and their staff, administrators or other interested parties on a wide variety of subject-matter areas
- Train, develop, and mentor others
- Gain and maintain the confidence and cooperation of others
- Maintain confidentiality of information and records
- Manage a complex regional outreach program
- Utilize interdisciplinary teams effectively and lead project management work groups
- Establish and maintain project priorities; review and edit written reports
- Manage multiple and/or changing priorities in a heavy workload situation
- Work independently and exercise strong organizational skills
- Assume increasing responsibility
- Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental problems
- Analyze data and present ideas and information effectively both orally and in writing
- Speak in front of a large crowd
- Ability to work effectively with tax program experts, executive management, and Board Member staff to resolve program and policy matters
- Ability to lead others and obtain their support in carrying out the goals of the Board's Outreach Services Division program elements
- Demonstrated ability to act independently, exhibit open-mindedness, flexibility and tact
- Work in a high rise building
- Travel up to 30% of the time

Desirable Qualifications

- Interpret and apply provisions of the tax laws, rules and regulations administered
- Thorough understanding of issues, strategies, and objectives related to the agency's media and taxpayer education and outreach programs
- Ability to identify challenges and opportunities related to the agency's education and outreach programs

- Thorough understanding of the techniques and processes required to plan, write, edit, design, produce and disseminate taxpayer education products – including translated documents and information appropriate for wide range media dissemination
- Knowledge of principles and practices in education outreach and media relations

Statement of Position

Under the direction of the Outreach Services Division, Staff Services Manager III, the Information Officer will manage the BOE’s regional outreach/education program. They will formulate and administer outreach programs to meet taxpayer service objectives critical to the agency’s implementation. They will facilitate the ongoing statewide outreach to taxpayers/practitioners and participate in partnership activities with stakeholders, community organizations, media outlets, and local, state, federal government agencies. Outreach activities will include conducting/planning/facilitating workshops, seminars, and participating in customer association conferences/meetings/expos.

PERCENTAGE OF TIME SPENT DUTIES

30% ***Oversees activities related taxpayer education and outreach.** Establish and maintain priorities and enlist management and program support of internal and external communications goals. Identify opportunities and challenges to the program and formulate Board-wide policy recommendations and strategies in the areas of public information and outreach needs, small business and tax practitioner communication and information needs, effective products, interagency cooperation, cost-effective production and dissemination methods, emerging technology and future program needs and trends. Establish and administer quality control safeguards to ensure proper management review. Develop program and operational plans specific to Regional Outreach. Develop partnerships with outside entities including the Franchise Tax Board, Employee Development Department, the Internal Revenue Service and other local government and non-profit entities. Develop publicity and communication plans to facilitate knowledge and understanding of the Board’s tax programs and related partnerships.

30% ***Develop and Deliver Communication and Educational Products** to BOE District liaisons, taxpayers, business owners, media outlets, tax practitioners, nonprofit entities and key partners in tax administration. Provide expert communication support and advice; write, design, develop, and implement communication/education plans and strategies. Focus on local regional engagement of the media, business, nonprofit and tax practitioner communities. Develop and implement the district’s annual regional communication plan.

30% ***Serve as the Regional Stakeholder Specialist,** be the local contact point for media outlets, tax practitioner and industry/business organizations on all non-case related matters. Maintain regular and continuing contact with the practitioners, and industry/business stakeholders who are leaders in the business community, keeping open lines of communication, identifying issues and concerns, and planning for meetings and forums. Initiate or actively participate in, and lead as appropriate the meetings and forums. Maintain a constant awareness of developments which may be of interest to the practitioner and the industry/business community. Analyze input from liaison activities for common themes and problems, develop and make recommendations for educational and/or systemic changes to address these issues.

Facilitate the interaction between the BOE, practitioners, and industry/business organizations for business and tax forums. This means working with representatives from practitioner and industry/business organizations to develop/plan/facilitate seminars, events, workshops, meetings, and outreach tools that meet the needs of all parties.

5% **Work with External Affairs Department management team**, Board Member and their staff, Board managers and program experts on special projects as required. Using project management best practices, principles, tools and methodologies, serve as Project Manager on multi-agency teams including education outreach events/conferences, joint taxpayer educational tools/products, joint-agency communications and marketing strategies/plans for OSD.

5% Other duties as required.

*Essential job functions

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
