

DUTY STATEMENT

SCHEDULE TO BE WORKED/WORKING HOURS Monday through Friday 8 am - 5 pm		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Supervising Property Appraiser		WORKING TITLE Supervisor, Assessment Practices Surveys, Sacramento	
DEPARTMENT/DIVISION/DISTRICT/UNIT County-Assessed Properties Division		SPECIFIC LOCATION ASSIGNED TO Sacramento	
SEERA DESIGNATION Nonrepresented	BARGAINING UNIT S01	WORK WEEK GROUP E	CERTIFICATES REQUIRED Property Tax Appraiser
FINGERPRINTS REQUIRED <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	BILINGUAL POSITION <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	SUPERVISION EXERCISED Yes	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 290-302-5454-XXX	

The mission of the State Board of Equalization is to serve the public through fair, effective and efficient tax administration.

POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under the general direction of a Business Taxes Administrator III (BTA III), Assessment Practices Surveys Section, County-Assessed Properties Division (CAPD), the Supervisor, Assessment Practices Surveys, plans, organizes, directs, and evaluates the work of staff in the completion of assessment practices surveys. The supervisor manages multiple compliance audits at one time as they go through the various phases of the assessment practices survey process and cycle, and is responsible for the completion of multiple county assessment practices surveys per year. The supervisor also serves as a key member of the CAPD management team and is a part of the Property Tax Department's and Board's overall management team. Travel to in-state locations may be required up to 50 percent of the time by automobile and airplane.

Assessment Practices Surveys, mandated by Government Code Sections 15640 through 15646, are on-site compliance audits of the assessment practices of the 58 California county assessors' offices and programs and are required to be completed every five years. The surveys also include the performance of a statistical sampling of county assessment rolls throughout the state and the production of a written public report that summarizes staff's findings and provides recommendations for improvement.

Candidate must be able to perform the following essential job functions with or without reasonable accommodation.

PERCENTAGE OF TIME SPENT	DUTIES
45%	<p><u>ESSENTIAL JOB FUNCTIONS</u></p> <p>Plans, organizes, directs, and evaluates the on-going work of assessment practices survey teams responsible for the completion of compliance audit surveys, sample audits and appraisals, and written reports. Ensures staff complies with established policies and procedures and survey compliance audits are conducted in compliance with property tax law and regulations. Reviews, analyzes, and edits written drafts of the various portions of the compliance audit report prepared by staff; reviews research and work papers completed by staff to ensure that all necessary steps were conducted during the survey, that the recommendation or lack of one is supported by the work papers, that the survey draft write-up reflects the findings of the review and is written in a clear and concise manner, and that the proper authoritative citations are used; providing input, questions, and feedback to staff on their draft sections and providing recommendations to BTA III on compliance audit survey report findings; and preparing the final written assessment practices survey reports for publication. Travel to in-state locations may be required up to 50 percent of the time by automobile and airplane.</p>
30%	<p>Reviews audits and appraisals completed by staff in the statistical sampling of property assessments portion of the assessment practices survey, ensures that the appraiser or auditor reviewed the county's appraisal or audit and appropriately completed the appraisal summary worksheets used in the sample process, and verifies the appraiser's or auditor's final fair market value estimate. Verifies that the appraiser or auditor appropriately checked the base year value, looked for any changes in ownership and new construction, identified any decline-in-value for the property, and entered any appropriate comments on the appraisal summary forms.</p>

10%	Responsible for handling the most difficult and/or politically sensitive topics and sample assessments in the assessment practices surveys. Prepares general correspondence to county assessors and/or property owners on issues affecting assessment practices surveys. Schedules and conducts conferences with county assessors and their staffs regarding recommendations and suggestions made by the survey team in the assessment practices survey report. Responds to and negotiates highly technical issues contained in recommendations and comments in the survey report to which the county assessor and/or his/her staff has objections.
10%	Determines staffing needs for each assessment practices survey; develops and sets priorities; interviews and hires new employees; ensures that employees take mandatory training classes and provides training or oversight of training of new and current employees; maintains and reviews measures of employee performance and output; evaluates employee work performance, prepares performance evaluations, and handles corrective action issues appropriately; and prepares and maintains monthly production reports.
5%	<p><u>MARGINAL JOB FUNCTIONS</u></p> <p>Participates in the evaluation and formulation of division and department policies as a member of the Property Tax Department management team. Represents the division in meetings of the Board and Board committees, the California Assessors' Association and its committees, other government agencies, and property taxpayers' groups. Performs other duties as required.</p>

WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB (if applicable):

Work Environment:

- Communicate effectively, both orally and in writing.
- Create and maintain cooperative working relationships with coworkers, representatives of all levels of government, the public, and the Legislative and Executive Branches.

Physical Abilities:

- Plan, organize, and direct the work of multidisciplinary professional and administrative staff engaged in tax auditing and tax compliance.
- Develop the skills and abilities of staff.
- Motivate staff to develop group and organizational goals.
- Resolve complex supervisory and managerial problems.
- Work cooperatively with taxpayers subject to tax/fee or regulation.
- Analyze data and draw sound conclusions.
- Handle situations accurately and take effective action.
- Prepare clear, complete, and concise reports.
- Handle shifting priorities, meet deadlines, work under pressure, and perform special assignments.

Additional Requirements/Expectations:

- Knowledge of organization and functions of the Board of Equalization (Board) and Property Tax Department.
- The tax laws, rules, and regulations, including related legal opinions and court decisions pertaining to the programs administered by the Board.
- Departmental administrative policies and procedures.
- General accounting and auditing principles and procedures and business law.
- General collection principles, procedures, and techniques.
- Specialized collection and compliance practices and procedures used in tax administration.
- Principles, practices, and trends of public and business administration.
- Principles and techniques of personnel management, supervision, and employee-employer relations.
- The Board's administrative goals and policies.
- The Board's Equal Employment Opportunity Program goals and objectives.
- A manager's role in the Equal Employment Opportunity Program and the processes available to meet the objectives.
- Advanced appraisal principles and standards.
- Travel to in-state locations may be required up to 50 percent of the time by automobile and airplane.
- Maintain a Board of Equalization appraiser certification.
- Possess a valid California driver's license.

I have read this duty statement and fully understand that I must perform the Essential Job Functions of my position with or without reasonable accommodation.

PRINT EMPLOYEE NAME	EMPLOYEE'S SIGNATURE	DATE
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I certify that the above accurately represents the duties of the position and that I have reviewed these duties with the above named employee.

PRINT SUPERVISOR NAME	SUPERVISOR'S SIGNATURE	DATE
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HRD Approval Date:	C&P Analyst Initials:
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