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DUTY STATEMENT

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|  | | CURRENT |
|  | PROPOSED |

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| SCHEDULE TO BE WORKED/WORKING HOURS  **Monday - Friday / 8:00 am - 5:00 pm** | | | EFFECTIVE DATE | |
| CIVIL SERVICE CLASSIFICATION  **Senior Specialist Property Appraiser** | | | WORKING TITLE  **Senior Change in Control Examiner** | |
| DEPARTMENT/DIVISION/DISTRICT/UNIT  **County-Assessed Prop. Div/Legal Entity Ownership Program** | | | SPECIFIC LOCATION ASSIGNED TO  **Sacramento, CA** | |
| SEERA DESIGNATION  **Rank and File** | | BARGAINING UNIT  **R01** | WORK WEEK GROUP  **2** | CERTIFICATES REQUIRED |
| FINGERPRINTS/BACKGROUND CHECK REQUIRED  Yes No | | BILINGUAL POSITION  Yes  No | SUPERVISION EXERCISED  **Acts in a lead capacity** | |
| INCUMBENT | | | POSITION NUMBER *(Agency-Unit-Class-Serial)*  **290-302-5449-019** | |
| *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 the Supervising Property Appraiser, Legal Entity Ownership Program (LEOP) Section, the Senior Specialist Property Appraiser independently or acting in a lead capacity analyzes and processes statements, records, and other documents for change in control and ownership of legal entities as it pertains to the property reappraisal. The incumbent focuses on issues involving more complex real property matters in the area of change in ownership. Travel may be required throughout the state up to 20 percent of the time by automobile and airplane. | | | | |
| **Candidate must be able to perform the following essential job functions with or without reasonable accommodation.** | | | | |
| **PERCENTAGE**  **OF TIME SPENT** | **DUTIES** | | | |
|  | **ESSENTIAL JOB FUNCTIONS** | | | |
| 65% | Line Responsibilities  Independently plans, directs, and conducts reviews of statement of change in control and ownership filings from legal entities for purposes of property reappraisal. Independently analyzes the more complex filings to determine if a change in control or ownership of a legal entity has occurred that results in reappraisal of all an entity's real property in California, as of the date of change in control, for property tax purposes. Acts in a lead person capacity over the staff in the legal entity ownership program section. Directs the work of staff and provides guidance to staff in areas pertaining to transfers of ownership interests, changes in control and exclusions from change in ownership. Travel may be required throughout the state up to 20 percent of the time by automobile and airplane.  Reviews change in control and ownership determinations processed by staff to ensure correctness; and reviews the accuracy of reports transmitted to county assessors. Prepares written analysis of transactions for review by legal staff. Analyzes and evaluates merger and acquisition information as it pertains to legal entity's owning real property in California. Works with LEOP staff to conduct research and analysis for referrals by County Assessors of potential changes in control of legal entities which may result in appraising all of an entity's property in California for purposes of property taxation.  Works on the more complex and sensitive issues pertaining to the legal entity ownership program. Responds to the more difficult telephone and written inquires from the public and County Assessors’ offices relating to legal entity changes in control or ownership. Provides oral and written technical assistance to taxpayers and/or their agents, County Assessors and their staff, legislative staff, and other parties. Develops guidance in the area of change in control or ownership, in the form of Frequently Asked Questions or other written guidance. Represents the Board and the department at various conferences or workshops to discuss change in ownership matters. Conducts the review of the change in ownership topic for Assessment Practices Surveys, as needed, and trains others in this regard. | | | |
| 30% | Lead Responsibilities  Acting in a lead capacity, conducts complex research projects involving assistant/associate level appraisers, auditor appraisers, staff service analysts, and tax technicians. Reviews and edits the documents and reports written by lower-level staff, and prepares reports for the Board or management involving the legal entity ownership program. Prepares and conducts training for entry level or new staff on all aspects of the legal entity ownership program and change in ownership law. | | | |
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|  | **MARGINAL JOB FUNCTIONS** | | | |
| 5% | As necessary, performs other job-related duties to cover the workload. | | | |
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| **WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB** *(if applicable)***:** | | | | |
| Work Environment: | | | | |
| * Office environment with open cubicles, artificial lighting, and temperature control. | | | | |
| Physical Abilities: | | | | |
| * Transport materials, records, and business equipment weighing up to 25 pounds. | | | | |
| Additional Requirements/Expectations: | | | | |
| * Possess a valid California driver's license. * Maintain a Board of Equalization (BOE) appraiser certification. * Computer proficient in Microsoft Office Suite, Internet, and database system. * Travel may be required throughout the state up to 20 percent of the time by automobile and airplane. | | | | |
| *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 | | | ***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 | | | | | |
| |  |  | | --- | --- | | HRD Approval Date: 11/13/2020 | C&P Analyst Initials: JPL | | | | | |
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