

# DUTY STATEMENT

CURRENT  
 PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS <b>Monday - Friday/8:00 a.m. - 5 p.m.</b>		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION <b>Senior Specialist Property Appraiser</b>		WORKING TITLE <b>Senior Change in Control Examiner</b>	
DEPARTMENT/DIVISION/DISTRICT/UNIT <b>BOE/County-Assessed/Legal Entity Ownership Program</b>		SPECIFIC LOCATION ASSIGNED TO <b>Sacramento, CA</b>	
SEERA DESIGNATION <b>Rank and File</b>	BARGAINING UNIT <b>01</b>	WORK WEEK GROUP <b>2</b>	CERTIFICATES REQUIRED <b>Property Tax Appraiser</b>
FINGERPRINTS/BACKGROUND CHECK REQUIRED <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	BILINGUAL POSITION <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	SUPERVISION EXERCISED <b>Act in a lead capacity</b>	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) <b>290-302-5449-019</b>	

*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 (SPA) of the Legal Entity Ownership Program (LEOP) unit, the Senior Specialist Property Appraiser (SSPA) independently or acting in a lead capacity reviews, analyzes, and processes statements, records, and other documents for change in control or changes in ownership of legal entities as it pertains to the property reassessment. The incumbent focuses on issues involving most complex real property matters in the area of change in ownership.

Travel may be required throughout the state up to twenty percent (20%) 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:
65%	<p><b><u>ESSENTIAL JOB FUNCTIONS</u></b></p> <p>Independently plans, directs, and conducts reviews of statements of change in control and ownership filings from legal entities for purposes of property reassessment. Independently analyzes the most complex filings to determine if a change in control or ownership of a legal entity has occurred that results in a reassessment of all an entity's real property in California as of the date of the change in control or change in ownership for property tax purposes.</p> <p>Acts in a lead person capacity over the LEOP staff in determining if their examination of filings and analysis of the entity's responses to the questions on the form as to interests transferred and the nature of the transaction, and application of any statutory exclusions from reassessment are correct. Directs staff work and provides guidance to staff about transfers of ownership interests, changes in control, and exclusions from changes in ownership 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 pertaining to the legal entity 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 a reassessment of all an entity's property in California for property taxation purposes.</p> <p>Works on the most complex and sensitive issues of the LEOP unit. Responds to the most challenging telephone and written inquiries from the public, as well as from County Assessors and their staff, and provides information regarding legal entity changes in control or changes in ownership, filing requirements, and notification of County Assessor reassessments. Gathers information and research to assist LEOP staff in determining appropriate action on filings.</p>

**290-302-5449-019**

30%

Acting in a lead capacity conducts complex research projects involving junior/assistant/associate level 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 LEOP 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.

5%

**MARGINAL JOB FUNCTIONS**

As necessary, performs other job-related duties to cover the workload.

**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 twenty-five pounds (25 lbs.), with or without reasonable accommodation.

**Additional Requirements/Expectations:**

- Possess a valid California driver's license.
- Maintain a California 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 twenty percent (20%) 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: 10/31/2022****C&P Analyst Initials: HSA**