



California State Board of Equalization

DUTY STATEMENT

☐ CURRENT
☒ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS Monday - Friday		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Attorney III		WORKING TITLE Attorney III	
DEPARTMENT/DIVISION/DISTRICT/UNIT BOE/Legal Department		SPECIFIC LOCATION ASSIGNED TO Sacramento, CA	
SEERA DESIGNATION Rank and File	BARGAINING UNIT 02	WORK WEEK GROUP SE	CERTIFICATES REQUIRED CA State Bar Membership
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 None	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 290-311-5795-001	
<p><i>The mission of the State Board of Equalization is to serve the public through fair, effective and efficient tax administration.</i></p>			
<p>POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS</p> <p>Under the general direction of the Chief Counsel, the Attorney III will be responsible for coordinating all phases of litigation with the Attorney General's office, in all matters within the substantive jurisdiction of the Board of Equalization (BOE) and personnel matters. The Attorney III will also participate in administrative appeals of substantive tax areas under the Board's jurisdiction. Substantive areas of responsibilities include state assessment, various programs related to county-assessed property taxation, tax on insurers, and alcoholic beverage tax law. Responsibilities will include overseeing all aspects of litigation assignments from case initiation and answer, discovery, dispositive motion practice, trial, and appeals. The Attorney III will also provide legal services to the Board and Board staff with respect to assigned subject matter areas, with a heavy emphasis on conducting research, drafting opinions, and answering oral and written inquiries from the staff, the Board, other governmental entities, and the public. This position will be a part of a small legal department, and will also make a significant contribution to Board governance and public disclosure law.</p> <p>Candidate must be able to perform the following essential job functions with or without reasonable accommodation.</p>			
PERCENTAGE OF TIME SPENT	DUTIES		
40%	<p><u>ESSENTIAL JOB FUNCTIONS</u></p> <p>Litigation- Coordinate with Attorney General's office representing the BOE in litigation primarily at all levels of California trial and appellate courts. Assist the Attorney General's office in preparing cases in trial and appellate courts, including assembling and evaluating evidence, and obtaining and interviewing expert witnesses. Evaluate and recommend to the chief counsel, executive director, and at times Board Members, a course of action based upon an evaluation of evidence in each case. Communicate with outside counsel and opposing parties, including at times negotiating to seek resolution of assigned cases. Coordinate with Legal support staff as needed. Effectively manage caseload to meet all imposed deadlines. Inform Board Members, agency staff, and/or stakeholders about the status of litigation, including potentially in presentations and publications.</p> <p>Administrative Appeals- review and evaluate state assessment appeals and conduct appeals conferences. Review submitted documents and prepare hearing summaries and summary decisions to provide a recommendation on the outcome of adjudicatory matters for Board consideration. Present hearing summaries or summary decisions at board meetings. Appeal subject matter primarily relates to Property Tax, Tax on Insurers, and Alcoholic Beverage Tax matters that are heard by the Board.</p>		

40%	Subject Matter Law Support - research, draft, and render oral and written legal advice to Board of Equalization staff and stakeholders in relation to Property Tax, Tax on Insurers, and Alcoholic Beverage Tax matters. Engage in rulemaking and legislative processes and analysis.
15%	Public Agency and Disclosure Law - Research, prepare, review, and provide oral and written opinions to the public, Board staff and management, and Board Members on selected administrative matters of a high degree of difficulty or sensitivity. These selected administrative matters include, but are not limited to the following subjects: confidentiality and disclosure of records under the Board's tax laws, the Quentin L. Kopp Conflict of Interest Act, the Political Reform Act, the Bagley-Keene Open Meeting Act, Incompatible Activities, Public Agency, Post-Governmental Employment, Misuse of Public Resources, Mass Mailing at Public Expense, Delegations of Authority, Local Tax Resolutions, and Oaths of Office. In addition, provides support to the Chief Counsel and Attorney IV in relation to these legal issues that may arise in the context of preparation for and during Board of Equalization meetings.
5%	<p><u>MARGINAL JOB FUNCTIONS</u></p> <p>Trainings and Meetings - Travels to attend or provide in-state training classes and off-site meetings. Attends meetings and host trainings to provide immediate advice on tax and complex administrative questions including but not limited to Public Agency Law, the Bagley-Keene Open Meeting Act, the Political Reform Act, and other issues of law and policy related to the Board and the agency.</p> <p>Performs analytical assignments and works on special projects, including administrative reports.</p> <p>Performs other job-related duties as required.</p>

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

- Standard office environment with artificial lighting and temperature control.

Physical Abilities:

- Requires daily use of a personal computer and related software applications.
- Requires ability to complete tasks that typically may require making repetitive hand movements in the performance of daily duties, with or without reasonable accommodations and modifications to facilitate such tasks.
- Transport equipment or files weighing up to twenty pounds (20 lbs.).

Additional Requirements/Expectations:

- California State Bar Membership.
- Experience advising on complex technical applications of California property tax law.
- Statewide travel may be required up to ten percent (10%) of the time.

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: 9/15/2025

C&P Analyst Initials: JK

