

California State
Board of Equalization
DUTY STATEMENT

CURRENT
PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Supervising Property Appraiser		WORKING TITLE Supervisor, Welfare Exemption Section	
DIVISION/OFFICE/UNIT Property Tax Department/CAPD/Welfare Exemption Section		SPECIFIC LOCATION ASSIGNED TO Sacramento	
SEERA DESIGNATION Supervisory	BARGAINING UNIT 01	WORK WEEK GROUP E	CERTIFICATES REQUIRED Property Tax Appraiser
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☐ Yes ☒ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED First Level Supervision	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 290-302-5454-	
<i>The mission of the California Department of Tax and Fee Administration is to make life better for Californians by fairly and efficiently collecting the revenue that supports our essential public services.</i>			
POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under the general direction of the Principal Property Appraiser (PPA), Welfare Exemption Section (WES) and Legal Entity Ownership Program (LEOP), County-Assessed Properties Division (CAPD), the Supervising Property Appraiser (SPA) plans, organizes, directs, and evaluates as a first-level supervisor the work of the staff in the examination of Organizational Clearance Certificate (OCC) and Supplemental Clearance Certificate (SCC) claims that are associated with the welfare exemption and veterans' organization exemptions. Organizational Clearance Certificate claim reviews, mandated by Revenue and Taxation Code section 254.6, are compliance audits of an organization's formative documents, tax-exemption status, and activities to ensure they conform to the statutory requirements for exemption. SCC claim reviews, required by Regulation 140.2, are compliance audits of a low-income housing limited partnership's (LP) formative documents and regulatory agreements to ensure the requirements of Regulation 140.1 are met as to the managing general partner's (1) qualification for an OCC, (2) material participation in the control, management of the LP business, and (3) performance of substantial management duties for the LP. The Board issues certificates to qualifying organizations and notifies assessors of eligibility. Organizations holding certificates are subject to audit periodically to ensure continued qualification for the welfare and veterans' organization exemptions. Candidate must be able to perform the following essential job functions with or without reasonable accommodation.			
PERCENTAGE OF TIME SPENT	DUTIES		
80%	<u>ESSENTIAL JOB FUNCTIONS</u> Plans, organizes, and directs the work of the Welfare Exemption Section; determines priorities for the various projects assigned to the section; and provides review and guidance on examination of Organizational Clearance Certificate and Supplemental Clearance Certificate claims that are associated with the welfare and veterans' organization exemption. Exemption activities include examination of claims and supporting documents for exemption eligibility for compliance with statutory and regulatory provisions, providing oral and written assistance to claimants, and conducting periodic reviews or audits of organizations that have previously been issued a certificate to ensure continued qualification for exemption.		
10%	Reviews and analyzes claimant's activities to ensure qualification for exemption and coordinates with legal staff on exemption claim matters. Responsible for handling the most difficult and/or politically sensitive topics and issues in exemptions. Responds to highly technical issues identified in findings issued to claimants. Assigns speakers to present material on the welfare exemption at nonprofit seminars hosted by Board Members throughout the state. Determines staffing needs for the section and group audits, develops and sets priorities; interviews and hires new employees; maintains and reviews measures of employee performance and output; takes necessary actions to ensure adequate performance and output; evaluates work performance, prepares performance evaluations, and handles corrective action issues appropriately; prepares monthly production reports and maintains production records		

10%

MARGINAL JOB FUNCTIONS

Participates in the evaluation and formulation of division and departmental policies as a member of the management team. Represents the division in meetings of the Board and Board committees, the California Assessors' Association and its committees, other governmental agencies, and taxpayers' groups.

Performs other duties as required.

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

- Office environment with open cubicles and offices, artificial lighting and temperature control.

Physical Abilities:

- Transport materials, records, and business equipment to various work sites weighing up to twenty pounds (20 lbs.), with or without reasonable accommodation
- Access and utilize personal computer, office equipment, and telephone daily.
- Remain in a stationary position, consistent with office work, for extended periods of time.

Additional Requirements/Expectations:

- Communicate professionally and effectively with all levels of staff and the public.
- Demonstrate a high degree of professionalism, courtesy, and consideration in all phases of work with both internal and external customers.
- Computer proficient in Microsoft Suite, Internet, and database system.
- Possess a current California driver's license.
- Maintain a Board of Equalization Appraiser Certificate, including continuing education.
- Travel may be required throughout the state up to ten percent (10%) 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

HRB Approval Date: 8/17/2026

C&P Analyst Initials: MM