

California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Career Executive Assignment (CEA), Level A		WORKING TITLE Assistant Deputy Director, FOD - Audits	
DIVISION/OFFICE/UNIT CDTFA/Field Operations Division (FOD)/Audit		SPECIFIC LOCATION ASSIGNED TO	
SEERA DESIGNATION Managerial	BARGAINING UNIT 01	WORK WEEK GROUP E	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☒ Yes ☐ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED Yes	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 291-440-7500-005	
<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 Deputy Director, Field Operations Division (FOD) of the California Department of Tax and Fee Administration (CDTFA), the Assistant Deputy Director of Audits manages and directs the tax program activities as they relate to auditing functions of the FOD, which includes statewide offices, branch offices, and out-of-state offices, as well as the Computer Audit Specialist (CAS) and Audit Review Section (ARS), to ensure that tax revenues are assessed in an equitable, effective, and efficient manner to provide General Fund and special fund revenue for state and local jurisdictions. In coordination with the Deputy Director and executive management, the incumbent provides consultation and advice and develops and recommends statewide sales and use tax policies and procedures, tax programs, and administrative issues related to overall field office operations, as well as the Computer Audit Specialist (CAS) and Audit Review Section (ARS). In addition, the incumbent develops and provides consultations and advice to the Deputy Director of FOD, as well as the Chief Deputy Director and Director of CDTFA, on sales and use tax statewide policies and procedures, tax programs, and administrative issues relative to the overall operations of the field offices as they relate to the audit functions of the department. The incumbent develops or assists the Deputy Director in developing and implementing a statewide strategic plan to improve efficiencies and reach the Field Operations Division's goals, as well as ensure consistency with the Department's Business Plan Initiatives and Strategic Goals. The Assistant Deputy Director reviews, evaluates, and implements tax program effectiveness and operational efficiency with specialization and focus on auditing functions. Candidate must be able to perform the following essential job functions with or without reasonable accommodation.			
PERCENTAGE OF TIME SPENT:	DUTIES:		
35%	<u>ESSENTIAL JOB FUNCTIONS</u> In coordination with the Deputy Director: plans, organizes, directs, and oversees the activities and tax program functions of the FOD as they relate to audit functions. These activities include functional guidance on audits, review of audits, administrative appeal of audit findings, allocation of audit resources, enforcement, advisory services, special revenue related projects, and exploring new uses of technology in tax programs; identifies inconsistencies in policy and procedure throughout the division; develops and implements strategies for effective and efficient administration of the tax programs; provides guidance to, oversees, and evaluates the activities of the administrators within the division with an emphasis on aligning executive direction and departmental goals with outcomes.		
25%	Develops, formulates, and recommends statewide audit program policies, procedures, and practices on statewide audit program issues; assists the Deputy Director of FOD with presenting before the legislature, various industries, tax practitioners, and consumer groups; serves as liaison with internal and external departments or agencies and the public.		
20%	As a key member of the FOD executive team, constantly provides advice, expertise, and assistance to the Director and Chief Deputy Director on tax issues and statewide sales and use tax program policies and procedures. Maintains an extensive working knowledge of all aspects of the Sales and Use Tax Law and Regulations, as well as extensive knowledge and high-level expertise in audit policies and procedures.		

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10%	Actively participates in strategic planning efforts which include formulating and implementing the Department's Business Plan Initiatives and Strategic Goals that complement the overall objectives of CDTFA; participating in fiscal, legislative, and regulatory activities and the clearance of publications and forms that impact FOD as well as all of CDTFA; reviewing and approving budgetary, personnel, and organizational changes involving all FOD field offices.	
10%	<u>MARGINAL JOB FUNCTIONS</u> Represents the Deputy Director of FOD and the Director and Chief Deputy Director of CDTFA in Field Operations matters in meetings, hearings, and conferences.	
WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB (if applicable):		
Work Environment: - May work in a high-rise building. - Standard office environment. - Daily use of a personal computer, office equipment, and/or telephone. - Requires being in a stationary position, consistent with office work, for extended periods of time.		
Physical Abilities: Ability to work a changing and flexible schedule both in person and virtually to meet operational needs.		
Additional Requirements/Expectations: Travel up to twenty-five percent (25%) of the time.		
<i>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.</i>		
PRINT EMPLOYEE NAME	EMPLOYEE'S SIGNATURE	DATE
<i>I certify that the above accurately represents the duties of the position and that I have reviewed these duties with the above named employee.</i>		
PRINT SUPERVISOR NAME	SUPERVISOR'S SIGNATURE	DATE
HRB Approval Date: 09/02/2026		C&P Analyst Initials: HSA