



DUTY STATEMENT

SCHEDULE TO BE WORKED/WORKING HOURS Monday-Friday		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Principal Property Appraiser		WORKING TITLE Property Tax Manager	
DEPARTMENT/DIVISION/DISTRICT/UNIT CAPD/Assessment Services & Training and Certification Unit		SPECIFIC LOCATION ASSIGNED TO Sacramento	
SEER DESIGNATION Managerial	BARGAINING UNIT M01	WORK WEEK GROUP E	CERTIFICATES REQUIRED Property Tax Appraiser
FINGERPRINTS/BACKGROUND CHECK REQUIRED ☐ Yes ☒ No	BILINGUAL POSITION ☐ Yes ☒ No	SUPERVISION EXERCISED Yes	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 290-209-5455-001	

The mission of the State Board of Equalization is to serve Californians through fair and transparent administration of Property Tax, the Alcoholic Beverage Tax, and the Tax on Insurers to strengthen communities and support state and local services.

POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under administrative direction of the Chief (CEA Level) in the County-Assessed Properties Division (CAPD), the Principal Property Appraiser (PPA) over the Assessment Services Unit (ASU) and Training and Certification Unit (TCU) is responsible for the planning, administration, direction, and evaluation, through subordinate supervisors, of (1) the Assessment Services Unit, which is mandated by Government Code section 15606(d) and (f), Revenue and Taxation Code sections 63.1, 69.5, 205.6, 218.5, and 401.5, and (2) the Training and Certification Unit, mandated by sections 670-673 and Property Tax Rules 281-284. The ASU serves County Assessors and taxpayers by issuing guidance on the interpretation and application of property tax laws and rules governing property tax appraisal practices and procedures through various documents and publications. The unit provides pertinent data and information to County Assessors to promote assessment uniformity. The TCU certifies State and County Assessors' personnel performing appraisals for property tax purposes. The unit develops training material and conducts classes on various appraisal topics through classroom and online training to State and Assessor personnel throughout California. The PPA also works cooperatively with County Assessors and their staff, taxpayers, and their representatives, and is a part of the Property Tax Department's and the Board's overall management team.

Candidate must be able to perform the following essential job functions with or without reasonable accommodation.

PERCENTAGE OF TIME SPENT	DUTIES
	ESSENTIAL JOB FUNCTIONS
40%	Plans, directs, and evaluates the work of the Supervising Property Appraiser in the Assessment Services Unit to provide guidance and oversight. Oversees the program's duties and responsibilities including: responding to inquiries from County Assessors, legislators, taxpayers, and other stakeholders on property tax issues; monitoring clearinghouse functions for transfer exclusions and the homeowners' and disabled veterans' exemptions; prescribing forms for use by County Assessors' offices; issuing advisory letters to all County Assessors and interested parties that provide staff interpretations of rules, laws, and court decisions, or general information relating to property tax assessment; updating Assessors' Handbook Sections and drafting instructional manuals on various assessment and appraisal topics; addressing complex property tax issues and implementing policies and procedures due to legislation affecting property tax.
40%	Plans, directs, and evaluates the work of the Supervising Property Appraiser in the Training & Certification Unit to provide guidance and oversight. Oversees the program's duties and responsibilities for certification of State and County Assessors' personnel, including County Assessors, performing appraisals for property tax purposes, and for monitoring their annual training. Reviews training and course materials and focuses on modernized strategies to ensure program goals are met by providing adequate, high-quality training to stakeholders.
10%	Acts in a leadership role and provides guidance to local officials and taxpayers, participates in meetings relevant to property tax encompassing laws and rules, and advisory materials; presents on program policy and property tax matters at the Board Meetings, meets with County Assessors and their staff on various matters related to the administration of property tax and makes recommendations on behalf of the County-Assessed Properties Division; represents the State Board of Equalization and presents at meetings and conferences with County Assessors and their committees on property tax matters; makes recommendations and implements policy changes to align with management and department goals.

PERCENTAGE OF TIME SPENT	DUTIES
10%	MARGINAL JOB FUNCTIONS Prepares preliminary budget requests for personnel, equipment, and other expenditures; performs various personnel management tasks related to the Assessment Services Unit and Training and Certification Unit. This position acts in the absence of the Division Chief and performs other job-related duties.

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

- Office environment with artificial lighting and temperature control.

Physical Abilities:

- Transport materials, records, and business equipment to various work sites weighing up to forty pounds (40 lbs.), with or without reasonable accommodation.

Additional Requirements/Expectations:

- Possess a valid California Driver's License.
- Maintain a Board of Equalization (BOE) appraiser certification including continuing education.
- Proficient with Microsoft Office or equivalent programs.
- Knowledge of property tax laws and rules.
- Travel may be required throughout the state up to ten percent (10%) of the time by automobile or 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
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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
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HRB APPROVAL DATE 9/25/2026	C&P ANALYST INITIALS JK
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