California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION		WORKING TITLE	
Attorney		**Attorney**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
Legal Division/Administrative Oversight Team (AOT) Section			
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Rank and File	**02**	**SE**	**State Bar Membership**
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☒ Yes ☐ No	☐ Yes ☒ No	**No**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291-322-5778-XXX	

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.

POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under direction of the Attorney Supervisor of the Administrative Oversight Team (AOT) Section and Attorney IV leads, Attorney acts as counsel for the California Department of Tax and Fee Administration (CDTFA) or department on highly sensitive employment law matters. In addition, the Attorney handles or assists in handling the least difficult to average difficult complex legal work and sensitive issues arising from the administration and enforcement of programs administered by the CDTFA. Overnight travel both in and out of state may be required up to twenty (20%) of the time.

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

PERCENTAGE OF TIME SPENT	DUTIES
60%	**ESSENTIAL JOB FUNCTIONS** Under guidance of senior attorneys, performs a wide variety of legal work associated with preparing and litigating the department's employment law cases. This includes performing research and analysis to advise management and program managers on important, complex, and sensitive employment and other non-tax legal matters, including labor relations and performance management issues, other human resources issues, department administrative and personnel policies, equal employment and discrimination, Internal Affairs issues and investigations, and tort and conflict of interest issues. Handles important, complex, and sensitive employment law and other administrative litigation in California and other states, including California State Personnel Board statutory and merit appeals, and matters before the California Department of Human Resources, the Unemployment Insurance Appeals Board, the Labor Commissioner, and related venues in Texas, Illinois, and New York. Litigates, in conjunction with the Department of Justice and private counsel, important, complex, and sensitive tax and non-tax civil litigation with emphasis on employment law matters. Handles all phases of these complex civil litigation matters. Works with the lead attorneys and other senior staff as required to develop litigation strategies. Prepares witnesses, investigates facts and conducts discoveries. Drafts and/or reviews of all critical litigation documents and court filings including pleadings and briefs, discovery plans, discovery requests/responses, and motions and petitions. Maintains employment law litigation status reports. Advises management regarding significant pending litigation cases and settlement discussions, as well as significant personnel issues. Reviews and provides advice concerning employee subpoenas, and Information Practices Act and Public Records Act requests, and related records produced.
30%	Under guidance of senior attorneys, performs research and analysis to advise management and department staff on complex and sensitive administrative legal matters, including but not limited to the following subjects: ethics and conflict of interest-related issues, such as ethics training, incompatible activities and outside employment, public contract conflicts, prohibition on holding incompatible offices, and anti-nepotism policy matters; revolving door and post-governmental employment; conflict of interest and disqualifications under the Political Reform Act, such as, rules regarding gifts, travel, and honoraria; use of state resources; delegations of authority; voter registration policies; California Whistleblower Protection Act Annual Notification; basic copyright law in California, and other miscellaneous government law matters.

	Assists with drafting the Conflict of Interest Code, and amendments as required, for the department. Prepares bi-annual reports to the Fair Political Practices Commission (FPPC) and prepares related forms. Provides legal support to department staff on Statement of Economic Interest (Form 700) reporting requirements and reviews and assists in drafting Form 700 annual notices and instructions. Independently researches and advises management on administrative matters and works on special assignments, including coordinating work on issues that may affect other areas, and assists with making presentations to department's executive management. Provides legal advice to department staff on the development and drafting of CDTFA's administrative policies and procedures to ensure consistency with State and federal law. Researches, reviews, analyzes, and provides legal advice with respect to the laws, regulations, administrative opinions, and court decisions related to disclosure issues and other administrative law matters, including but not limited to the Public Records Act, Information Practices Act, Political Reform Act, the California Whistleblower Protection Act, and other provisions of state and federal law related to departmental administrative matters.
10%	**MARGINAL JOB FUNCTIONS** Perform other job-related duties as required. This includes special projects, such as advising CDTFA executive management and Chief Counsel on relevant legal issues, assignments, drafting reports, travel, speaking engagements, administrative work, and training.

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

Work Environment:

- This position may require working in a high-rise building.

Physical Abilities:

- Light office work, e.g., transporting up to twenty pounds (20lbs), typing, data entry, repositioning oneself, traversing up to one-fourth (1/4) mile at a time.

Additional Requirements/Expectations:

- Both in-state and out-of-state travel is required up to twenty percent (20%) of the time by car and/or plane.
- Work cooperatively with a variety of individuals and organizations and maintain the confidence and respect of others.

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: 11/05/2026	**C&P Analyst Initials: EH**

California Department of Tax and Fee Administration

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☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION		WORKING TITLE	
Attorney III		**Attorney III**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
Legal Division/Administrative Oversight Team (AOT) Section			
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Rank and File	**02**	**SE**	**State Bar Membership**
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☒ Yes ☐ No	☐ Yes ☒ No	**No**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291-322-5795-XXX	

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POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under general direction of the Attorney Supervisor of the Administrative Oversight Team (AOT) Section and Attorney IV leads, Attorney III acts as counsel for the California Department of Tax and Fee Administration (CDTFA) or department on highly sensitive employment law matters. In addition, the Attorney III independently handles or assists in handling difficult complex legal work and sensitive issues arising from the administration and enforcement of programs administered by the CDTFA. Overnight travel both in and out of state may be required up to twenty percent (20%) of the time.

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

PERCENTAGE OF TIME SPENT	DUTIES
60%	**ESSENTIAL JOB FUNCTIONS** Advises management and program managers on important, complex, and sensitive employment and other non-tax legal matters, including labor relations and performance management issues, other human resources issues, department administrative and personnel policies, equal employment and discrimination, Internal Affairs issues and investigations, and tort and conflict of interest issues. Handles important, complex, and sensitive employment law and other administrative litigation in California and other states, including California State Personnel Board statutory and merit appeals, and matters before the California Department of Human Resources, the Unemployment Insurance Appeals Board, the Labor Commissioner, and related venues in Texas, Illinois, and New York. Litigates, in conjunction with the Department of Justice and private counsel, important, complex, and sensitive tax and non-tax civil litigation with emphasis on employment law matters. Handles all phases of these complex civil litigation matters. Works with the lead attorneys and other senior staff as required to develop litigation strategies. Prepares witnesses, investigates facts and conducts discoveries. Drafts and/or reviews of all critical litigation documents and court filings including pleadings and briefs, discovery plans, discovery requests/responses, and motions and petitions. Maintains employment law litigation status reports. Advises management regarding significant pending litigation cases and settlement discussions, as well as significant personnel issues. Reviews and provides advice concerning employee subpoenas, and Information Practices Act and Public Records Act requests, and related records produced.
30%	Handles and advises management and department staff on complex and sensitive administrative legal matters, including but not limited to the following subjects: ethics and conflict of interest-related issues, such as ethics training, incompatible activities and outside employment, public contract conflicts, prohibition on holding incompatible offices, and anti-nepotism policy matters; revolving door and post-governmental employment; conflict of interest and disqualifications under the Political Reform Act, such as, rules regarding gifts, travel, and honoraria; use of state resources; delegations of authority; voter registration policies; California Whistleblower Protection Act Annual Notification; basic copyright law in California, and other miscellaneous government law matters.

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