

## **TAX MANAGER**

### DEFINITION

To plan, direct and manage the treasury and property tax division of the Department of Finance; or to perform a variety of technical accounting and bookkeeping work in the processing, maintenance and review of property taxes and trust fund accounts.

### DISTINGUISHING CHARACTERISTICS

Positions in the class of Tax Manager are assigned to manage either the tax collection or tax disbursement activities of the Department of Finance. Tax collection activities are performed under the Treasury/Tax Collection Division of the Department of Finance and tax disbursement responsibilities are performed under the Accounting Division.

### SUPERVISION RECEIVED AND EXERCISED

Tax Manager (assigned to collections); Receives direction from the Assistant Director of Finance/Treasury, Assigns, reviews and coordinates the work of clerical and technical personnel.

Tax Manager (assigned to disbursements); Receives direction from the Assistant Director of Finance/Auditor; as required, Assigns, reviews and coordinates the work of clerical and technical personnel.

### EXAMPLES OF DUTIES -- Duties may include, but are not limited to, the following:

Consults with department administration in the development and implementation of policies and procedures.

Coordinates division functions with other County departments and agencies as required.

Consults with subordinates and superiors regarding administrative, personnel and technical problems as they arise.

Performs general administrative work as required, including but not limited to preparing reports and correspondence, entering computer data, etc.

Receives and responds to inquiries from other departments and personnel.

### When Assigned to Collections:

Plans, directs and manages staff activities; provides leadership, advice and assistance to subordinates as needed.

Performs general accounting billing and collection work, daily bank activities and deposits, and tax roll tape copies as necessary.

Participates in employee interviewing, selection, training, work assignment and performance evaluation of subordinate staff; implements disciplinary action as required.

Receives, balances, manages and disburses cash and checks from tax payments, deposit permits, and receivables in cash box.

Plans, coordinates and manages activities related to the of property tax system.

Supervises and/or performs necessary accounting/bookkeeping tasks to complete tax cycle.

Prepares and balances bank account, all property tax collections, all trust accounts and other ledger accounts pertaining to the Treasurer/Tax Collector division.

Modifies, develops, maintains and monitors automated systems operations for effective and efficient tax collection and record-keeping; assists other staff in system use.

Analyzes new or proposed legislation, county policy and procedures; determines impact on operations and interprets effects to the staff and public.

Performs related duties as assigned.

When Assigned to Disbursements:

Prepares tax bills from the tax rolls received from the County Assessor.

Creates and updates tax rate files.

Releases appropriate taxes apportioned for public agencies including cities, counties, school and special districts.

Processes corrections to secured and unsecured property tax rolls.

Coordinates activities with the treasury/tax division of the department.

Interprets and applies Federal, State laws and regulations relating to property taxes.

Calculates and apportions property tax receipts.

Updates, balances and reconciles financial statements including tax rolls and funds, fund schedules and trust fund accounts.

QUALIFICATIONS:

Knowledge of:

California tax code, tax collector manual and applicable state and federal regulations.

County Treasury functions.

Collection and billing principles, practices and procedures.

Laws and regulations related to the collection and disbursement of property taxes

Principles and practices of organization, administration and personnel management.

Basic accounting principles and procedures.

Accounting mathematics and statistical analysis.

Modern office procedures, methods and technology.

Principles and application of data processing systems.

English usage, spelling, grammar and punctuation.

Ability to:

Understand, interpret and apply pertinent Federal, State and local laws, rules and regulations.

Analyze complex tax refund and correction situations.

Effectively plan, organize and direct tax accounting activities.

Provide effective leadership and supervision of assigned personnel.

Think analytically and critically.

Make sound, educated decisions and work independently with limited direct supervision.

Perform accounting and mathematical calculations with speed and accuracy.

Proficiently use personal computers and common office equipment .

Prepare required reports accurately and in a timely manner.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain cooperative working relationships with those contacted in the course of work.

Proficiently use complex computer software programs related to the disbursement of property taxes.

EXPERIENCE AND TRAINING GUIDELINES

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience:

Five years of experience involving California county property tax collection or disbursement functions, including at least one year in a lead or supervisory capacity.

Training:

Equivalent to the completion of the twelfth grade, supplemented by course work in bookkeeping, accounting or related field. Bachelor's degree in accounting, business management, public administration or related field desirable.

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Bargaining Unit:	12
FLSA Status:	Y
Workers' Compensation Code:	8810
Pay Table:	CNTY
Range:	Refer to current "Class Range Sort List"