

Principal Tax Compliance Officer
(Class Code No. 1195)

Task List

1. Plans work of field and discovery operations, public counters discovery efforts, billing and collection efforts, or collecting delinquent tax and non-tax debt activities by establishing priorities, scheduling work, and setting deadlines in order to ensure that activities of the section are conducted in an efficient and timely manner to meet annual goals.
2. Develops section's performance metrics and modifies as necessary, evaluates section's productivity and recommends improvements/initiatives.
3. Develops, recommends and implements collection strategies to maximize revenue collections.
4. Interfaces with other divisions in the Office of Finance and other City departments regarding accounts and assigned projects.
5. Assess and determine whether personnel and equipment resources of each office or unit supervised are adequate for the workload, and recommends changes in deployment of personnel or equipment when necessary, so that activities may be conducted in an efficient and timely manner.
6. Makes recommendations on new procedures for the Office of Finance when required by changes in the law, regulations or technology in order to assure efficiency and uniformity of operations, and assists on implementation as part of a group comprised of other Principal Tax Compliance Officers and management.
7. Provides technical assistance and direction to subordinates on the more difficult and problematic taxpayer issues.
8. Organizes special field enforcement activities such as task force sweeps of a particular area in conjunction with other City departments (e.g. Police, Building and Safety, Department of Transportation) by making work assignments, disseminating instructions to participating subordinates, and writing a formal after-action report which includes a narrative and statistical data.
9. Assigns projects such as designing new billing forms, teaching a class on tax ordinances, or developing a job analysis and proficiency form to subordinate supervisors or groups of subordinates based on considerations such as employee workload, employee capabilities, and development needs of individual employees.
10. Gives instructions to subordinate supervisors or peers regarding office and/or field activities concerned with the investigation and enforcement of City tax and permit ordinances in order to ensure that these activities are carried out consistently and in compliance with the law and established policy.
11. Writes procedural memos concerning the application of new and amended laws, rules, and regulations in the day-to-day operations of the Office of Finance in order to ensure that these operations are executed consistently and in compliance with the law and established policy.

12. Evaluates section's procedures and processes and makes recommendations to management on proposed changes.
13. Meets regularly with subordinate supervisors on an individual basis to discuss their performance in order to provide feedback, improve productivity, and to identify training needs.
14. Writes responses to written grievances filed by subordinates after discussion regarding the details of the grievance with the liaison from the Personnel Department, and in accordance with City policy and applicable Memoranda of Understanding.
15. Attends formal grievance hearings, or arbitration hearings at the request of the Personnel Department.
16. Interviews and selects prospective employees for subordinate professional and clerical supervisory positions in order to evaluate their qualifications, experience in type of work desired, and other requirements of the Office of Finance.
17. Answers questions from the public and/or representatives of other City departments about complex tax and permit matters, both in person and on the telephone or email.
18. Meets with taxpayers and/or subordinates to discuss unresolved tax issues, and try to reach an agreement or resolve a complaint.
19. Reviews cases for filing at Small Claims Court or referral to the Office of the City Attorney for litigation.
20. Informs management of the activities of the units supervised, and any concerns, ideas, or suggestions from subordinates.
21. Writes extensive and complex narrative material, such as technical and administrative procedures, interpretations of ordinances, descriptions of new programs, training program objectives and specifications, budget justifications, and correspondence.
22. Acts as primary liaison with contracted outside collection agencies and reviews their performance.
23. Creates new forms, and/or recommends revisions to existing forms and designs when ordinance changes, new technology render existing forms obsolete, or as needed.
24. Organizes the activities necessary to complete short-term special projects by selecting subordinates who will participate, giving individual work assignments, checking periodically to make sure the project is proceeding on schedule, and reviewing the completed work.
25. Organizes the Office of Finance's formal ordinance training class for new employees by reviewing and updating the outline of material to be covered; preparing the instructor by discussing the outline, teaching procedures, and logistics of the training program; checking that all necessary materials are included and available (particularly those relating to recent ordinance changes); checking to be sure that students are notified; and evaluating the effectiveness of the program by reviewing trainees' scores on written tests.
26. Visits branch offices to attend meetings and to observe operations for the purpose of assuring

uniformity of operations and equitable distribution of workload and to maintain personal contact with subordinates assigned there.

27. Promptly investigates and resolves problems observed or complaints received about the personal conduct or job performance of subordinate supervisors, initiates formal disciplinary action when necessary, in order to maintain high standards for work and behavior of employees.
28. Discusses with subordinate supervisors their supervisory responsibilities in responding to improper personal conduct or job performance by their subordinates, reviews written investigations prepared by subordinate supervisors, initiates formal disciplinary action when necessary, in order to maintain high standards for work and behavior of employees.
29. Writes documents such as letters to the public, performance evaluations, suggestions for improvements, and statistical reports.
30. Reviews documents such as letters to the public, performance evaluations, suggestions for improvements, statistical reports, narrative audit requests, IOD (injured on duty) reports, and mileage reimbursement requests prepared by subordinates for completeness, accuracy, compliance with established procedures, and/or grammar.
31. Approves requests for time off, including vacation and sick leave for subordinate supervisors and changes work schedules as needed to ensure that work is completed in a timely manner.
32. Recommends requests for overtime when workload fluctuations require that subordinates work longer hours in order to complete assignments in a timely manner.