

CLASS SPECIFICATION
Tax Supervisor

FLSA Status: Exempt
Union Representation: Nonrepresented

GENERAL PURPOSE

Under general supervision, supervises the day-to-day activities of staff engaged in performing a wide range of tax program functions and activities including collection of delinquent accounts and the location of unregistered businesses; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

The Tax Supervisor is responsible for supervising the day-to-day operations of a work section in the License & Tax Division of the Revenue Bureau engaged in reviewing tax accounts, calculating and collecting taxes, performing collections functions for delinquent taxes or outstanding assessments, and providing information to businesses and individuals on tax requirements. An incumbent is expected to exercise independent judgment while supervising field and office staff activities to ensure achievement of bureau goals and objectives. The incumbent also serves as a technical resource to staff in analyzing and resolving difficult issues and cases.

The Tax Supervisor is distinguished from License & Tax Division Manager in that an incumbent in the latter class is responsible for overseeing all division functions and activities and participating in bureau-wide policy and program development duties.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Any one position in this class may not perform all the duties listed below, nor do the listed examples of duties include all similar and related duties that may be assigned to this class.

1. Plans, supervises and evaluates the work of assigned staff; with staff, develops, implements and monitors work plans to achieve division mission, goals and performance measures; participates in developing and monitoring performance measures against the division budget; supervises, participates in developing, recommends and implements plans, policies, systems and procedures applicable to unit responsibilities.
2. Plans, organizes, controls, integrates and evaluates the work and performance of assigned staff; establishes performance requirements and personal development targets; regularly monitors performance and provides coaching for performance improvement and development; recommends merit increases and other rewards to recognize performance; recommends disciplinary action, up to and including termination, to address performance deficiencies, in accordance with the City Charter, Code, human resources policies and labor contract provisions.
3. Serves as owner for program functional processes; identifies process improvement opportunities; oversees process improvement efforts and identifies process improvement team members; approves

process improvements within the tax function; works with appropriate functional managers for approval of process improvements that impact other function processes.

4. Provides leadership and works with staff to create a high performance, service-oriented work environment that supports the City's and division's mission, objectives and service expectations; provides leadership and participates in programs and activities that promote workplace diversity and a positive employee relations environment.
5. Supervises the activities of office and field staff engaged in tax collection work, including computing and collecting taxes, penalties and interest; collecting delinquent accounts and assessments; and providing information to businesses and individuals on tax requirements.
6. Supervises activities to identify and capture base information on businesses and individuals the bureau taxes; analyzes account information and makes corrections; supervises field activities to locate businesses and individuals who are not properly registered and filing tax returns.
7. Supervises activities to monitor and manage exempt accounts.
8. Analyzes, develops, implements and directs procedures and automated systems related to the tax collection process; oversees staff involved in collection of past due accounts; reconciles discrepancies with ACH, credit card and/or other automatic payment accounts, coordinates with credit reporting companies and outside collection agencies.
9. Maintains, updates and corrects manual and electronic data records; requests refunds and credits; reviews accounts for accuracy.
10. Supervises biannual tax season processes and priorities; works with other agencies to ensure timeliness and accuracy of processes.
11. Meets with business owners to provide assistance and encourage voluntary program compliance.
12. Serves as a technical resource to staff in analyzing complex issues and identifying and resolving account errors.
13. Works with management staff to set program priorities, analyze workload issues and determine solutions.
14. Develops and prepares documentation for use in the administration of bureau programs, including work procedures and training manuals.
15. Responds to requests for study, change and creation of rules, procedures and measurements for program tracking, analysis and reporting.

16. Assists in the development and testing of new computerized information systems; assists with determining development priorities.
17. Assists in establishing and maintaining procedures to ensure confidentiality of financial and business information.

OTHER DUTIES

1. May act as backup to the License & Tax Division Manager in that individual's absence.
2. May act as backup supervisor to the Unlicensed Compliance Team in that supervisor's absence.

MINIMUM QUALIFICATIONS

Knowledge of:

1. Office administrative and operations management practices and procedures.
2. Local laws, policies, rules and procedures governing Bureau tax programs including City Business License Code, Multnomah County Business Income Tax requirements.
3. ACH, credit card and other automated financial transaction requirements and acceptance policies.
4. Federal and state law and regulations, case law and administrative rules applicable to areas of assigned responsibility.
5. Business Licenses Information System (BLIS) and its modules.
6. Methods and techniques of process improvement and reengineering including computer system improvement.
7. Standard and advanced uses of word processing, graphics, spreadsheet, database and other software.
8. Principles and practices of public administration, including budgeting, purchasing, contracting and maintenance of public records.
9. City ordinances, rules, policies, and procedures relating to the administration of a City bureau.
10. Principles and practices of sound business communication; correct English usage, including spelling, grammar and punctuation.
11. Principles and practices of effective supervision.
12. City human resources policies and labor contract provisions.

Ability to:

1. Plan, direct, supervise and evaluate the work of assigned staff.
2. Organize, set priorities and exercise sound independent judgment within areas of responsibility.
3. Define issues, analyze problems, evaluate alternatives and develop sound, independent conclusions and recommendations in accordance with laws, regulations, rules and policies.
4. Operate a computer and standard business software.
5. Communicate clearly and effectively orally and in writing.
6. Prepare clear, accurate and concise records and reports.
7. Understand, interpret, explain and apply City Code and ordinances and financial and audit information and results to business owners and concerned individuals.
8. Maintain confidential information.
9. Use tact and diplomacy in dealing with sensitive situations and concerned people and customers.
10. Work effectively as a member of a team.
11. Establish and maintain highly effective working relationships with City managers and staff, representatives of County government, license holders and applicants, business owners, residents and others encountered in the course of work.

Training and Experience:

A typical way of obtaining the knowledge, skills and abilities outlined above is graduation from a four-year college or university with a major in business or public administration, accounting or a closely related field; and at least three years of progressively responsible experience in the issuance, administration and auditing of business licenses or taxes; or an equivalent combination of training and experience.

Licenses; Certificates; Special Requirements:

A valid state driver's license may be required for certain assignments.

PHYSICAL AND MENTAL DEMANDS

Persons with disabilities may be able to perform the essential duties of this class with reasonable accommodation. Reasonable accommodation will be evaluated on an individual basis and depends, in part, on the specific requirements for the job, the limitations related to disability and the ability of the hiring bureau to accommodate the limitation.

Class History:

Adopted: 07-01-02 Licensing Operations Supervisor (7410) class created as a result of Nonrepresented Classification & Compensation Study, 2000-2002. This class is composed of positions from the following class(es):
0966 PROGRAM COORDINATOR. Adopted: 07-01-92

Revised: 05-16-06 Changed class title to License and Tax Supervisor; updated class specification to reflect the organizational change from the Bureau of Licenses to the Revenue Bureau, and the additional responsibility of supervising regulatory programs.

June 2009 - Change Job Class number from 7410 to 30000587, due to system change.

Revised: 6/29/09 Updated duties to include tax season and exempt account responsibility. Title changed from License and Tax Supervisor to Tax Supervisor.