

**CLASS SPECIFICATION**  
**Tax Division Manager**

FLSA Status: Exempt  
Union Representation: Nonrepresented

**GENERAL PURPOSE**

Under policy direction, plans, organizes, directs and manages the activities of the Tax Division of the Revenue Bureau; oversees the tax and licensing policy and operations functions for various programs, including collecting delinquent accounts, identifying, locating and pursuing unlicensed or non-permitted businesses and taxpayers, and providing administrative support to the bureau through the front desk and mailroom operations; provides executive and policy support to the Revenue Bureau Director in developing programs and initiatives to meet bureau goals; and performs related duties as assigned.

**DISTINGUISHING CHARACTERISTICS**

The Tax Manager reports to the Revenue Bureau Director. The incumbent is responsible for directing and overseeing the bureau's tax and business licensing policies, activities and operations, including identifying and pursuing enforcement of the City's tax and licensing requirements with unlicensed and non-permitted businesses. The incumbent also provides strategic advice and support to the Director and serves as the Revenue Bureau Director in the Director's absence. Responsibilities and assignments are broad in scope, requiring a thorough understanding of City, bureau, other jurisdiction and client policies, practices and procedures and require the exercise of a significant degree of managerial discretion in their execution.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class. Any one position in this class may not perform all the duties listed below.

1. Plans, organizes, controls, integrates and evaluates the work of assigned staff; develops, implements and monitors work plans to achieve bureau or City program goals and performance measures; develops and monitors performance against the annual division budget; manages and directs the development, implementation and evaluation of work programs, plans, processes, systems and procedures to achieve City and bureau program objectives and performance measures consistent with the City quality, and citizen service expectations.
2. Plans, organizes, directs and evaluates the performance of assigned supervisors and staff; establishes performance requirements and personal development targets; regularly monitors performance and provides coaching for performance improvement and development; provides compensation and other rewards to recognize performance; recommends disciplinary action, up to and including termination, to address performance deficiencies in

accordance with City Charter, Code, human resources policies and labor contract agreements, and subject to director and City management concurrence.

3. Provides leadership and works with program staff to develop and retain highly competent, service-oriented staff through selection, compensation, training and day-to-day management practices that support the City's and bureau's mission, objectives and service expectations; provides leadership and participates in programs and activities that promote workplace diversity and a positive employee relations environment.
4. Directs and participates through subordinate managers and staff in the development of policies, programs and processes pertaining to the taxation, licensing and revenue collection for businesses within the City of Portland and Multnomah County.
5. Plans and directs through subordinate managers and staff the administration of the business license program and various tax programs for the City of Portland, Multnomah County or other local jurisdictions, including associated tax reporting and payment processing; researches and analyzes a variety of tax or revenue collection programs and activities (including business or personal taxes, transient lodging tax and others) and formulates recommendations for program implementation or improvement.
6. Provides executive-level policy and operational support to bureau Director in planning, directing and evaluating programs and initiatives to achieve bureau mission and goals; contributes to the development of policies, systems and procedures for the bureau; serves as bureau director in the Director's absence; performs assignments on behalf of the Director.
7. Through subordinate supervisor, provides administrative and operational support for the bureau via the front desk and mail room functions which provide customer service, imaging/scanning, printing, mailing, document retrieval and other support functions.
8. Analyzes new or proposed federal, state and local laws, codes and regulations to assess their impact on tax and revenue collection programs administered by the Revenue Bureau; advises the Bureau Director, OMF leadership, City Council and County staff, and testifies before the state legislature and other jurisdictions on potential impact of proposed legislation.
9. Directs the preparation of program revenue projections, data comparison and analysis and forecasts and participates in the development of the Bureau's revenue forecasts; directs the preparation of/or prepares periodic reports and analysis of administered programs and financial results for use by the Bureau Director and OMF, for presentation and decisions by the City Council and Multnomah County.
10. Provides tax expertise within and outside the City; represents the City with other jurisdictions in the development of tax and revenue programs; in cooperation with Bureau Director provides consultation to the Chief Administrative Officer on tax and revenue issues; represents the bureau to City Council members.
11. Represents the City with businesses, community and business groups, other public agencies, the media and others regarding City business license, County business income tax, and transient lodging tax, special event permitting, and business improvement district matters; facilitates policy and issue resolution when actions cross lines of control; facilitates broad regional interaction and policy consistency.

12. Monitors government, industry and information technology provider trends and emerging technology to make strategic, cost effective investments in technology to further improve service delivery to licensees, citizens, the City and other service customers.
13. Provides recommendations and advice to bureau Director and other supervisors and managers concerning the application of City Human Resource and Financial rules and policies.
14. Manages the Arts Tax collection program.

## **MINIMUM QUALIFICATIONS**

### **Knowledge of:**

1. Principles and practices of public administration, including budgeting, purchasing, disclosure, security and maintenance of public, private and proprietary records.
2. Principles, practices and techniques of revenue collection, reporting and forecasting, information technology development and operations, applicable to areas of business responsibility.
3. Federal, state and local laws, regulations and court decisions applicable to taxation and business licensing
4. Typical government tax functions and associated management, financial and public policy issues.
5. Political, social and environmental issues influencing program development and implementation.
6. Theory, principles and practices of business operations and financial management.
7. Research methods and analysis techniques.
8. Principles and practices of sound business communication.
9. Principles and practices of effective human resource management and supervision, including human resources policies and labor contract provisions.

### **Ability to:**

1. Plan, organize, and direct the operations of a large business licensing and revenue collection program.
2. Analyze and make sound recommendations on complex management and administrative issues.
3. Understand, interpret, explain and apply policy and procedures typical to a similar municipal jurisdiction.
4. Present proposals and recommendations clearly, logically and persuasively in public meetings.

5. Represent the City effectively in negotiations.
6. Establish and ensure compliance with appropriate procedures and controls.
7. Prepare clear, concise and comprehensive correspondence, reports and other written materials.
8. Exercise sound, expert independent judgment within broad general policy guidelines. .
9. Exercise tact and diplomacy in dealing with sensitive, complex political and confidential issues, records and situations.
10. Establish and maintain highly effective working relationships with elected officials, City managers, other elected and appointed governmental officials, industry and business executives, professional and community groups, developers, employees, media representatives and the public.

**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 administration, accounting or a closely related field; and at least five years of progressively responsible taxation, auditing, accounting or finance experience, at least two years of which were at a supervisory or management level; or an equivalent combination of training and experience. Experience in a public agency is preferred.

**Licenses; Certificates; Special Requirements:**

License as a Certified Public Accountant at time of appointment is preferred.

**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.

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Class History:

Adopted: 07-01-02 Licensing Division Manager

Class created as a result of Nonrepresented Classification & Compensation Study, 2000-2002. This class is composed of positions from the following class(es):

926 ADMINISTRATIVE SERVICES MANAGER. Adopted: 07-01-92

Revised:

11-29-04 (Updated to reflect a change in scope of classification.)

03-23-06 (Updated class spec and title to reflect movement from Bureau of Licenses to the Revenue Bureau)

June 2009 - Change Job Class number from 7415 to 30000588, due to system change.

October 2013 – change in title from License and Tax Division Manager. Updated duties.

December 2017 – Made CPA preferred rather than required.

