



## Job Description

<b>Working Title:</b> Deputy Assistant Director, Tax Policy		<b>Job Code:</b> UN07979	<b>Reports To:</b> Assistant Director
<b>Job Code Descr:</b> Deputy Assistant Director		<b>Position Number/s:</b> SRV000001521	
<b>Division/s:</b> Taxpayer Service	<b>Department Name/s:</b> Taxpayer Executive & Legal Issues	<b>Law Enforcement:</b> No	
<b>Pay Schedule/Grade:</b> AREG 29	<b>FLSA Status:</b> Exempt	<b>EEO Class:</b> First/mid-level officials and managers	
<b>Prepared By:</b> A Sloat/H Pai /J Brown	<b>Approved By:</b> J Brown	<b>Last Update:</b> 11/12/2024	

### Position Summary:

The Deputy Assistant Director (DAD) oversees and evaluates the operations, productivity, staff resources, budget, and strategic goals for the Taxpayer, Executive, and Legislative Issues (TEL) district. The DAD directly supervises, manages, and provides direction to the administrators of the various units within the district, which encompass tax administration, licensing and registration, enforcement, policy, and controversy functions. This position reports to the Assistant Director of the Taxpayer Services division. In addition to the Assistant Director, this position receives direction from, and provides advice and recommendation to, the Director, Deputy Director, General Counsel, and Director of Legislative Affairs regarding policy matters involving all tax types and general tax administration. This position requires subject matter expertise in Arizona state and local taxation matters, including knowledge of the legislative and regulatory rulemaking processes in this state and tax controversies in both administrative hearing and court settings.

### Supervision:

This position currently has 7 supervisory and non-supervisory direct reports, who oversee a total team of 36 - 42 staff members.

<b>Essential Functions:</b>	<b>% of Time</b>	<b>Essential/ Non-essential</b>
<p><u>Leadership</u> Working in partnership with the Executive Leadership Team (ELT), develops the strategic direction and implementation plan for the TEL district to align with enterprise objectives and to drive organizational value. Partners with the Assistant Director of Taxpayer Services and other Division DADs in creating operational objectives relevant to their Division/Districts/Offices. Works cross-functionally with other DADs/leaders throughout the agency and with cities and other external stakeholders and partners.</p> <p>With a focus on leadership, mission, vision, culture, strategy, best practices, and continuous improvement, performs the following:</p> <ul style="list-style-type: none"> <li>● Leads and directs the planning, design, scoping, functional analysis, development, implementation, and support of the District's operations and service delivery, including:               <ul style="list-style-type: none"> <li>○ Appeals &amp; Protest</li> <li>○ Disclosure and Records Office</li> <li>○ Income Tax Policy</li> </ul> </li> </ul>	35%	E 1, 2, 3, 4, 5



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<ul style="list-style-type: none"> <li>o Transaction Privilege Tax Policy</li> <li>o Tobacco Tax Audit &amp; Compliance</li> <li>o Enforcement &amp; Criminal Investigations</li> <li>● Ensures that technical and quality standards (including those for audit readiness) meet the needs of taxpayers and applicable federal and state laws, are enforced throughout work processes and lifecycles, and comply with other applicable regulatory and/or program requirements.</li> <li>● Leads and directs the District’s resource planning and allocation for optimal capacity, utilization, and performance.</li> <li>● Works collaboratively with other divisions and districts to ensure organizational alignment.</li> <li>● Has budget, finance, and procurement responsibilities, including:             <ul style="list-style-type: none"> <li>- Providing input to the Assistant Director/Deputy Director for a single and multi-year budget for one time and ongoing expenditures.</li> <li>- Engaging with the Budget Office for monthly ongoing monitoring, maintaining and revising budget spending plan forecasts.</li> <li>- Adhering to the Arizona Procurement Code by working under the guidance of the Procurement Office for any and all procurement related activities.</li> <li>- Engaging with Financial Services to ensure unit/district/division is complying with the State of Arizona Accounting Manual policies, e.g. ensuring invoices are paid in a timely manner per A.R.S. § 35-342.</li> </ul> </li> </ul>		
<p><b>Talent Management</b></p> <p>In collaboration with executive leadership and Talent, develops and executes a plan for retaining and developing talent to meet current and future business objectives to include:</p> <ul style="list-style-type: none"> <li>● Engaging in performance management calibration and talent review evaluations</li> <li>● Collaborating with direct reports on their professional development and growth</li> <li>● Inspiring staff to continue to build their skill and craft while keeping ahead of the curve for the future challenges</li> <li>● Training, mentoring, and coaching employees</li> <li>● Assisting with developing leadership succession plans for the department</li> </ul>	10%	E 1, 2, 3, 5
<p><b>Supervisory</b></p> <p>Carries out supervisory responsibilities in accordance with ADOR’s core values, agency policies, applicable standard work, and applicable laws. Responsibilities include:</p> <ul style="list-style-type: none"> <li>● Planning, assigning, coordinating, and overseeing the daily work of direct reports in alignment with strategic, operational, and tactical priorities of the organization.</li> <li>● Conducting regular one-on-one meetings in which constructive, balanced, and regular performance feedback, coaching, and mentoring are provided.</li> <li>● Setting and monitoring reasonable stretch performance goals and conducting mid-year and annual performance appraisals.</li> <li>● Effectively and appropriately delegates responsibilities to and among subordinate staff to ensure that deliverables requested of the position or from the District are provided in a timely and efficient manner.</li> <li>● Recognizing and rewarding performance excellence, culture championship, and continuous improvement efforts where resources and opportunities exist</li> <li>● Effectively communicating and enforcing agency policies and programs.</li> </ul>	15%	E 1, 2, 3, 5



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<ul style="list-style-type: none"> <li>Applying corrective action, addressing complaints, and resolving problems in a timely fashion, involving and collaborating with leadership and Human Resources as appropriate.</li> </ul>		
<p><b>Functional/Operational</b>  <i>Carries out the following duties personally and through subordinate staff</i></p>		
<p><u>Subject Matter Expertise, Performance and Champion/Liaison</u>          Is a subject matter expert for Tax Policy on behalf of the agency, which includes:</p> <ul style="list-style-type: none"> <li>Providing general litigation support and as-needed legal research and analysis to the General Counsel, including drafting of legal memoranda and review of briefs and motions from the Attorney General's office or outside counsel.</li> <li>Assisting in the development and review of substantive policy statements and legal guidance on complex tax matters and tax administration by the district or as needed by the General Counsel and other units within the agency.</li> <li>Reviewing and providing legal analyses of proposed and enacted legislation on an as-needed basis; accompanies leadership or the legislative liaison to meetings with stakeholders, legislators, legislative staff, and lobbyists regarding potential or pending legislation as needed; proposes legislation to agency leadership and recommends proposals for legislative changes as needed.</li> <li>Representing the agency with other SMEs and ELT members before such bodies as the Multistate Tax Commission and Federation of Tax Administrators in a substantive capacity.</li> </ul>	10%	E 3, 5
<p><u>Projects Engagement</u>          Engages as project sponsor, leader, project business lead, and SME as applicable to ensure the successful execution of all mandated and non-mandated projects.</p>	10%	E 2, 5
<p><u>Agency/Department Compliance &amp; Continuous Improvement</u></p> <ul style="list-style-type: none"> <li>Remains current on all laws, regulations, policies, and best practices related to taxation through regular engagement in activities such as: self-directed research, conferring with other practitioners and technical experts; subscriptions to regulatory/legal/industry newsletters and briefs; membership in industry associations and attendance at meetings/events; and participation in training and others continuing education opportunities</li> <li>Participates in the creation of policies and procedures that align with statutory, regulatory, and agency requirements, and meets with ELT members to discuss the legal interpretations and positions taken by the agency in policy statements and tax controversies</li> <li>Actively contributes to team and individual effectiveness through the following:             <ul style="list-style-type: none"> <li>Regularly attends and leads (as applicable) staff meetings and huddles within the District</li> <li>Completes all required training in a timely manner</li> <li>Prepares for and actively participates in 1:1 coaching with the Assistant Director</li> </ul> </li> <li>Directs, leads, and manages the development, implementation, maintenance and evaluation of continuous improvement principles and projects to maximize work processes and deliverables through lean principles within the Arizona Management</li> </ul>	15%	E 1, 2, 3, 5



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System (AMS); and provides recommendations for process improvement, and engages in continuous improvement efforts as assigned		
<ul style="list-style-type: none"> <li>Actively contributes to problem solving efforts and activities within the agency and ensures that the District mirrors the agency's overall strategic direction</li> </ul>		
Other duties as assigned	5%	NE

### Requirements

#### *Education & Experience*

- Any combination that meets the knowledge, skills and abilities (KSAs); typical ways KSAs are obtained may include but are not limited to: a relevant degree from an accredited college or university such as a Master's Degree (e.g., M.A), training, coursework, and work experience relevant to the assignment.
- Minimum of 8 years related experience in municipal, state, or federal government tax
- Minimum of 2 years in leadership capacity leading leaders

#### *Licenses & Certifications*

Member in good standing with the State Bar of Arizona or equivalent body of another U.S. state that is responsible for the admission and disciplining of attorneys. If a successful candidate is an inactive member of such a body, ADOR will work with the candidate to ensure they reactivate their license within a twelve-month period or such time agreed upon between the candidate and the agency.

#### *Knowledge and Understanding*

- In-depth knowledge of state income tax, state and local transaction privilege tax and related excise taxes, luxury taxes, property tax, administrative rulemaking, and tax information confidentiality statutes, including relevant case law, tax rulings, tax procedures, and regulations.
- Knowledge of federal, state, and local laws.

#### *Skills*

- Exceptional verbal, written, and listening communication skills
- Excellent interpersonal skills and demeanor
- Strong legal research skills
- Strong organization and time management skills with the ability to manage multiple projects simultaneously and work in high-pressure situations
- Effective project management skills with the ability to lead, direct the work of teams without formal supervisory authority
- Proficient in the use of a PC in a Windows environment; in the use of the Internet; in the use of MS Office applications such as Outlook, Word, Excel, and PowerPoint; and in the use of Google Suite applications such as Gmail, Sheets, Docs, and Drive.

#### *Abilities*

- Ability to clear a comprehensive background and clearance process that includes an Arizona tax compliance verification, and a criminal background check through the FBI via level one fingerprint clearance through the Arizona Department of Public Safety
- Ability to build strong stakeholder partnerships with professionalism, credibility, initiative, self management, and reliability
- Ability to work with a high degree of autonomy and also participate collaboratively as part of a team
- Ability to consistency demonstrates a high level of emotional intelligence and political savvy



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- Ability to understand and solve problems by applying advanced analytical skills to include collecting, integrating and analyzing all relevant data and information and reduced that information down to manageable components and/or charts, diagrams or graphs; identifying a number of solutions to complex problems integrating findings from several different disciplines, identifying and evaluating the various options developed and selects the most effective solution; drawing logical and objective conclusions from the data and validates them as the prime cause and contributing causes; identifying a number of solutions to the problem by identifying and evaluating the various options developed and selects the most effective solution.
- Willingness and ability to embody ADOR's core values of Do the Right Thing, Commit to Excellence, and Care About One Another

### ***Additional Job Demands***

- In the course of performing essential duties, one must be able to exert up to 20 pounds of force occasionally, and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects.
- No substantial exposure to adverse environmental conditions (such as in typical office or administrative work.)
- Travel up to 5% of the time

### **Selective Preferences**

Juris Doctor or Master of Laws