

**State of Michigan
Civil Service Commission**
Capitol Commons Center, P.O. Box 30002
Lansing, MI 48909

Position Code 1. BUREAADMB11N

POSITION DESCRIPTION

This position description serves as the official classification document of record for this position. Please complete the information as accurately as you can as the position description is used to determine the proper classification of the position.	
2. Employee's Name (Last, First, M.I.)	8. Department/Agency TREASURY CENTRAL PAYROLL
3. Employee Identification Number	9. Bureau (Institution, Board, or Commission) Tax Compliance Bureau
4. Civil Service Position Code Description STATE BUREAU ADMINISTRATOR	10. Division
5. Working Title (What the agency calls the position) Bureau Director	11. Section
6. Name and Position Code Description of Direct Supervisor NEWTON, THERESA; REVENUE COMPLIANCE DIRECTOR	12. Unit
7. Name and Position Code Description of Second Level Supervisor WILKINSON, LANCE; SENIOR CHIEF DEPUTY DIRECTOR	13. Work Location (City and Address)/Hours of Work Operations Center, 7285 Parsons Drive, Dimondale MI / M-F 8:00-5:00 PM
14. General Summary of Function/Purpose of Position This position serves as the Director of the Tax Compliance Bureau for the Department of Treasury. The Tax Compliance Bureau is responsible for the full administration of compliance activities including taxpayer audits, voluntary disclosure, fraud prevention and tax enforcement. This position is responsible for the establishment and implementation of standards, policies, procedures and protocols to increase compliance with Michigan's tax laws. This position is also responsible for setting the strategic direction of the Bureau and ensure alignment with Treasury goals, champion efforts to continuously improve operations, customer service, and inclusion and diversity efforts.	

15. Please describe the assigned duties, percent of time spent performing each duty, and what is done to complete each duty.

List the duties from most important to least important. The total percentage of all duties performed must equal 100 percent.

Duty 1

General Summary:

Percentage: 50

Provide strategic direction and ensure the bureau achieves the goals and objectives of the Department. Set overall direction for the tax compliance efforts. Develop measures and ensure standards are met on how audits are conducted. Establish program goals that will enhance voluntary compliance with Michigan's taxes. Oversee the audit discovery functions.

Individual tasks related to the duty:

- Oversee the Field Audit Division to ensure coordination and direction of audit activity.
- Establishes direction and guidelines for audit selection and review.
- Oversee the Discovery and Tax Enforcement Division to coordinate selection of division projects.
- Evaluate and implement alternative processes to achieve greatest compliance efficiencies.
- Direct the activities of staff in the implementation of the Bureau's goals, responsibilities, and policies.
- Monitor progress/activity/backlog reports to ensure targets and metrics are being met, taking corrective action when needed.
- Oversee internal controls and implement changes as needed.
- Work closely with internal/external stakeholders, such as other tax areas, Office of Attorney General, other state agencies, Internal Revenue Service, and others regarding compliance matters.
- Monitor established standards through effective management of staff.
- Oversee sensitive issues such as taxpayer complaints, executive management referrals, potential employee integrity of performance concerns and incidents, etc.
- Direct initiatives that foster alignment between engagement efforts and the bureau's strategic objectives.
- Coordinate engagement activities to reinforce the bureau's strategic vision.
- Formulates current and long-range programs, plans and goals for the bureau.

Duty 2

General Summary:

Percentage: 25

Identify policy and legal issues that arise because of audit and enforcement activity and coordinate solutions with other Department staff.

Individual tasks related to the duty:

- Develop a program to identify issues that arise through staff activity that may have policy or legal impact.
- Communicate issues to other Department units.
- Coordinate efforts with other staff units to develop a solution to issues.
- Communicate solutions or program changes to staff and Deputy Treasurer/Executive Office
- Consult and obtain advice from the Attorney General's office on issues as needed, direct staff as needed.
- Utilize Attorney General or Prosecuting Attorney resources in litigation and criminal tax enforcement cases.
- Direct staff to analyze the impacts of proposed legislation and ensure policies, procedures and systems are revised to comply with new/revised legislation at the State and Federal level.

Duty 3

General Summary:

Percentage: 20

Oversee annual budget and develop annual plans and performance measures. Monitors Bureau compliance with budget and planning goals. Identifies and procures information technology to effectively enhance tax compliance efforts. Assists with other administrative duties as directed by the State Treasurer or Deputy Treasurer.

Individual tasks related to the duty:

- Oversee annual budgets for the Tax Compliance Bureau, coordinating issues with other bureaus and Executive staff.
- Review budget reports and establish internal controls to ensure compliance with expenditure goals.
- Develop budget recommendations and monitor the spending of the bureau.
- Review performance measurements for compliance; modifications and additions.
- Prepares annual plan for use in reviewing efforts to achieve bureau and employee performance goals.
- Develop guidelines for improving service for the public.
- Plans for information technology needs and acquire information technology equipment, software and resources necessary to meet tax compliance goals.

Duty 4

General Summary:

Percentage: 5

Represent the Bureau or the Department at professional functions regarding programs and policy issues.

Individual tasks related to the duty:

- Attend audit and enforcement seminars that impact Michigan tax laws.
- Make recommendations on the latest legal and audit efforts from tax administration consortiums.
- Make presentations on Department programs and plans for further development.
- May serve as department's point of contact in litigation arising from audit activity.

16. Describe the types of decisions made independently in this position and tell who or what is affected by those decisions.

Decisions necessary for planning and management of a comprehensive tax compliance program and related systems.

17. Describe the types of decisions that require the supervisor's review.

Recommendations on policy matters are discussed with the Deputy State Treasurer, Chief Deputy State Treasurer and/or State Treasurer regarding controversial decisions that have a major impact. Failure to reach goals are budget impact considerations also require supervisor review.

18. What kind of physical effort is used to perform this job? What environmental conditions in this position physically exposed to on the job? Indicate the amount of time and intensity of each activity and condition. Refer to instructions.

Travel, overnight stays and/or extended work hours may be required. Attend and/or participate in conferences and seminars. Meeting urgent deadlines and resolution of complex issues or problems may result in stressful situations. Work requires extensive use of a personal computer. Work performed in a typical office environment

19. List the names and position code descriptions of each classified employee whom this position immediately supervises or oversees on a full-time, on-going basis.

<u>NAME</u>	<u>CLASS TITLE</u>	<u>NAME</u>	<u>CLASS TITLE</u>
HOWE, HEATHER	EXECUTIVE SECRETARY-1A 11	THELEN, KYLE M	STATE ASSISTANT ADMINISTRATOR 15
MCCARTHY, KATHERINE	STATE DIVISION ADMINISTRATOR 17	BRANNER, ROSLYN I	STATE DIVISION ADMINISTRATOR 17
NONHOF, DAVID A	STATE DIVISION ADMINISTRATOR 17		

Additional Subordinates

20. This position's responsibilities for the above-listed employees includes the following (check as many as apply):

- | | |
|--|---|
| <input checked="" type="checkbox"/> Complete and sign service ratings. | <input checked="" type="checkbox"/> Assign work. |
| <input checked="" type="checkbox"/> Provide formal written counseling. | <input checked="" type="checkbox"/> Approve work. |
| <input checked="" type="checkbox"/> Approve leave requests. | <input checked="" type="checkbox"/> Review work. |
| <input checked="" type="checkbox"/> Approve time and attendance. | <input checked="" type="checkbox"/> Provide guidance on work methods. |
| <input checked="" type="checkbox"/> Orally reprimand. | <input checked="" type="checkbox"/> Train employees in the work. |

22. Do you agree with the responses for items 1 through 20? If not, which items do you disagree with and why?

Yes

23. What are the essential functions of this position?

This position serves as the Director of the Tax Compliance Bureau for the Department of Treasury. This position is

responsible for full administration of compliance activities including taxpayer audits, voluntary disclosure, fraud prevention and tax enforcement. Oversee the Bureau budget, technology equipment and software requirements. Foster an inclusive environment that values diverse perspectives and cultivates employee recruitment, retention, development and leadership.

24. Indicate specifically how the position's duties and responsibilities have changed since the position was last reviewed.

PD last reviewed 2013. PD is updated to reflect updated strategic goals. Generally, the essential functions of the position have not changed. Minor updates to blocks: 14, 15-1, 2, 3, 16, 17, 18, 19, 23, 25

25. What is the function of the work area and how does this position fit into that function?

The Tax Compliance Bureau is responsible for auditing taxpayers and ensuring compliance with Michigan tax laws. This position serves as Director of the bureau and is responsible for providing direction, oversight, and long-range planning of the bureau program activities.

26. What are the minimum education and experience qualifications needed to perform the essential functions of this position.

EDUCATION:

Possession of a bachelor's degree in any major.

EXPERIENCE:

Two years of administrative experience as a professional manager or equivalent experience.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Extensive knowledge of the principles and techniques of administrative management including organization, planning, staffing, training, budgeting and reporting.
- Ability to plan, direct and coordinate program and administrative activities of a complex, interrelated, and interdependent nature, where unknowns and numerous contingency factors are involved.
- Ability to communicate tactfully and effectively through both written and verbal communication throughout the Department.
- Ability to establish and maintain effective relationships and demonstrate effective leadership skills.
- Ability to lead and motivate others in the accomplishment of a task.
- Ability and willingness to delegate assignments, authority, and responsibility, to determine where a task can most appropriately be accomplished, and to establish management controls for follow-up.
- Thorough knowledge of staffing requirements and training necessary for the accomplishment of Treasury goals.
- Thorough knowledge of program planning, development, and evaluation methods.
- Knowledge of state and federal laws related to tax administration and collection practices.
- Knowledge of bankruptcy laws and security interests under the Uniform Commercial Code.
- Ability to interpret laws, rules and regulations relative to the work.

CERTIFICATES, LICENSES, REGISTRATIONS:

This position has a FTINPRINT sub-class code. The sub-class code indicates the position has access to Federal Tax Information (FTI) and requires passing of a fingerprint-based background check per IRS Publication 1075.

NOTE: Civil Service approval does not constitute agreement with or acceptance of the desired qualifications of this position.

I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.

Supervisor

Date

TO BE FILLED OUT BY APPOINTING AUTHORITY

Indicate any exceptions or additions to the statements of employee or supervisors.

N/A

I certify that the entries on these pages are accurate and complete.

SONYA CARTER

10/30/2024

Appointing Authority

Date

I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.

Employee

Date