STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 09/02/2021

HR Initials: alc

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title	**Position Number**
Career Executive Assignment, CEA B	564-184-7500-001
Working Title	**Bureau and Section**
Director/Chief Security Officer/Information Security Officer	Privacy, Security and Disclosure Bureau

Our mission is to help taxpayers file timely and accurate tax returns, and pay the correct amount to fund services important to Californians. In order to support this mission, FTB employees strive to develop in CalHR's Core Competencies: Collaboration, Communication, Customer Engagement, Digital Fluency, Diversity and Inclusion, Innovative Mindset, Interpersonal Skills, and Resilience. Core competencies are the knowledge, skills, and behaviors which are foundational to all state employees regardless of classification.

General Statement

Under the administrative direction of the Chief, Administrative Services Division, the incumbent directs the department's Privacy, Security, and Disclosure Program and serves as the department's Chief Security Officer (CSO). As required by state law, the incumbent receives technical guidance from the Chief Information Officer (CIO) on policy matters that have an information technology (IT) focus. The incumbent also reports to the Executive Officer (EO) on the most critical and sensitive matters impacting the department. The CSO serves as a member of the department's Senior Management Team and chairs the Privacy & Security Action Committee. The incumbent is responsible for developing and implementing information security, physical security, and privacy policies. The incumbent also develops policies to protect confidential data owned by the department. The director will have interactions with both internal and external entities in the development of security and privacy policies, processes and procedures. This position also serves as the Information Security Officer (ISO) for the Government Operations Agency.

Essential Functions

Percentage	Description
30%	Researches and evaluates existing and emerging technology, methodologies, and industry best practices to keep abreast of appropriate information security and privacy controls in order to make viable policy recommendations. Plans, organizes and directs the Information Security and Oversight Section, Worksite Security Section, Privacy, Disclosure and Data Resources Section, and any other programs to ensure the safeguarding of data information and privacy, physical assets and people. Ensures the Department is in compliance with the Information Practices Act (IPA), the Public Records Act (PRA), and the disclosure provisions in the Revenue and Taxation Code. Develops, recommends and implements policies associated with information and physical security, privacy, data retention, and risk management.
20%	Identifies security risks and recommends appropriate security measures that will help executive management understand the risks and the need to reduce them to acceptable levels. Ensures the integrity and security of the department's information security assets and automated systems applications, projects and facilities, and the appropriate use of these assets are properly maintained by establishing policies and monitoring the activities of internal and external parties who have a need to have access to them.
20%	As the department's CSO, the incumbent acts as the subject-matter expert on data information and privacy issues. Identifies, reviews, and makes policy recommendations to the Executive Officer and/or the Executive Management Team regarding sensitive and emerging data information and privacy issues and recommends appropriate courses of actions. Identifies information security and privacy weaknesses and proposes solutions to appropriate project, IT, or program management.

Percentage	Description
10%	Serves as Chair of the Privacy and Security Action Committee. As the Chair, the incumbent informs and advises executive, business, and IT management on security plans, operations, and metrics to ensure the information security program adapts to the evolving business needs of the FTB. Consults with the EO and the CIO on policies and procedures applicable to business need or technical solution to protect the confidentiality and security of information assets.
10%	Consults with and provides recommendations to the CIO on policy matters that pertain to the protection of all IT resources and information from unauthorized use, access, modification, loss, or destruction, or disclosure. Represents the department with federal, state, and other stakeholders on security, privacy and disclosure issues. Represents the department on any external committees regarding data information and privacy.

Marginal Functions

Percentage	Description
10%	Responds to written and verbal inquiries from department management and external parties on security, privacy, disclosure or resolution management issues. Performs special assignments or projects for the Executive Officer, CIO, and/or the Administrative Services Division Chief on matters dealing with privacy, security, and disclosure. Serves as the Information Security Officer (ISO) for the Government Operations Agency.

Employee: I confirm that I have read and understand the described duties and functions of this position.

Name (Print)	Signature	Date

Supervisor: I certify that the above information accurately represents the described duties and functions of this position.

Name (Print)	Signature	Date