



Duty Statement

Request for Personnel Action (RPA) Number 2526-00274	Effective Date
Classification Title Administrator IV	Position Number 564-514-4346-001
Working Title Assistant Bureau Director	Bureau and Section Legislative Services Bureau

Our mission is to help taxpayers file timely and accurate tax returns and pay the correct amount to fund services important to Californians. 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

The Legislative Service Bureau (LSB) provides the services needed to ensure legislation that affects the department's programs can be administered. LSB does this by: (1) maintaining positive working relationships with the Legislature, the Administration, the three-member FTB; and various other external stakeholders (2) providing timely, accurate, and objective analyses; (3) drafting technically correct legislation; and (4) maintaining an environment of responsiveness to our customers.

Under the general director of the Bureau Director, the Assistant Bureau Director plans, organizes, and directs the department's development and analyses of proposed legislation that impacts FTB, tax administration, or tax policy ensuring that the department's program managers are informed of such proposed legislation in a manner that is sensitive to the legislative process. The Assistant Bureau Director leads LSB technical responsibilities ensuring the accuracy of analyses and the drafting of legislation through LSB leads, collaboration with the Legal Division, and review. The Assistant Bureau Director oversees the implementation of new legislation via enterprise collaboration and reporting, manages other projects regarding tax and non-tax administration and tax policy as required, including Federal Conformity, and represents the department before legislative committees, and in frequent meetings with Legislators, legislative staff, constituents, and various other external stakeholders.

Essential Functions

Percentage	Description
30%	The Assistant Bureau Director coordinates, plans, organizes, and manages a team of Program Specialist III's who review analyses for proposed changes to the state's income tax laws and special requests from external stakeholders. The incumbent oversees the Administrator III and the staff that perform legislative analysis and complete special requests from external stakeholders. In addition, represent the department before legislative committees and in meetings with Legislators, legislative staff, representatives of the Administration, and constituents on the technical aspects of the personal income, corporate, and administration of franchise and income tax laws, as well as other laws impacting FTB.
30%	Review bill analyses and departmental legislative change proposals for technical correctness and tax and administrative policy issues. Resolves and/or advises on issues regarding specific bill analyses and legislative change proposals through exercise of judgment, communication, and often difficult, sensitive negotiations with departmental managers, staff attorneys, members of the Legislature, legislative committee staff, the Administration, the Department of Finance (DOF) staff, and various other external stakeholders.
20%	Provides technical guidance and facilitates technical discussions and collaboration for complex bill analyses and drafting requests. The incumbent provides coaching in developing the legislative analysis

Percentage	Description
	considering the complexities of the development of legislative analyses, the current laws and policies, external factors, and their interactions with proposed legislation.
10%	The incumbent will coordinate with the enterprise to implement new legislation ensuring appropriate and complete implementation. Advise and consult with respect to a wide range of legislative matters in connection with Board Member-initiated projects, inquiries, or other special FTB enterprise projects, as directed.

Marginal Functions

Percentage	Description
10%	In collaboration with the management team, LSB leads, and the Legal Division, develop an annual training plan for staff to maintain and enhance their technical knowledge and experience. The incumbent acts as the back up to the Bureau Director as needed.

Signature Authorization

If I choose to sign this form electronically, I agree that my electronic signature is a legally binding equivalent to my handwritten signature on a paper form.

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