



## Duty Statement

<b>Request for Personnel Action (RPA) Number</b>	<b>Effective Date</b> 07/01/2026
<b>Classification Title</b> Career Executive Assignment (CEA) – Level B	<b>Position Number</b> 564-201-7500-002
<b>Working Title</b> EDR Technical Director	<b>Bureau and Section</b> Tax Systems Modernization 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

Under the administrative direction of the Chief Information Officer (CIO), the Technical Director serves as a high-level executive responsible for the strategic leadership and oversight of enterprise-wide technology, data, cybersecurity, and systems within the Information Technology (IT) program areas of the Franchise Tax Board (FTB). The incumbent will also represent the business needs of FTB’s information technology during the planning and implementation of the Tax Systems Modernization (TSM) project, a three-phased, 20+ year approach to modernizing information technology systems to meet the business needs of FTB’s programs tasked with filing, auditing, and collecting taxes. This position is a key member of the department’s Executive Management Team and plays a critical and significant role in shaping and implementing policies that directly support FTB’s mission and California’s statewide tax administration. The role demonstrates executive-level expertise in enterprise IT strategy, modernization, and governance and requires proven experience in managing large-scale technology programs, reducing technical debt, and leading technology-related initiatives. The incumbent must possess a strong understanding of state and federal compliance frameworks, emerging technologies, and the ability to lead cross-functional teams while influencing statewide policy and innovation. The incumbent provides expert guidance on aligning technology investments with business priorities, ensures compliance with state and federal mandates, and leads enterprise modernization and innovation initiatives.

### Essential Functions

Percentage	Description
50%	<p><b>Project Oversight and Operational Accountability</b></p> <p>Provide high-level executive leadership and strategic direction for all major technology initiatives under the TSM strategy. Oversee enterprise-scale modernization efforts, including legacy system replacement, cloud adoption, digital transformation, cybersecurity, and enterprise architecture. Exercise broad administrative authority to prioritize resources, establish enterprise technology policies, and ensure statewide compliance with IT, security, privacy, and procurement requirements. Evaluate emerging technologies, approve technical strategies, and guide FTB toward long-term, sustainable technology investments supporting statewide fiscal and program goals. Ensure effective execution of multi-year, multi-vendor portfolios through enterprise-wide planning, budget oversight, and data-driven decision-making.</p>
20%	<p><b>Executive Policy Leadership and Strategic Direction</b></p> <p>Serve as the principal technical authority and executive liaison for the TSM initiative, representing FTB technology interests before the Governance Council, executive leadership, oversight entities, and statewide partners. Lead high-level negotiations and engagement with the project’s prime solution provider and other vendors to ensure adherence to contractual obligations, service levels, performance metrics, and state expectations. Develop and maintain enterprise technical strategies, policies, and roadmaps that align technology modernization with FTB’s long-term business, legislative, and operational objectives. Collaborate closely with the Business Director to ensure unified enterprise</p>



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Percentage	Description
	decision-making, consistent communication, and integrated governance. Build and sustain strong relationships with internal divisions, state agencies, legislative bodies, and external stakeholders to advance modernization, foster transparency, and support enterprise change.
15%	<p><b>Governance, Risk, and Compliance</b></p> <p>Serves as a voting member of FTB’s executive governance bodies, providing authoritative recommendations on enterprise risk, resource allocation, and technology direction. Leads the integration of governance frameworks across enterprise architecture, project management, and IT service management to promote transparency, accountability, and continuous improvement. Supports the department’s cybersecurity strategy, ensuring protection of sensitive taxpayer data and critical infrastructure. Implements and maintains security frameworks such as NIST, Zero Trust Architecture, and continuous monitoring protocols. Collaborates with the Chief Information Security Officer (CISO) to ensure proactive threat detection, incident response readiness, and compliance with cyber regulations. Ensures compliance with statewide and federal policies, including those related to data ethics, accessibility, and digital equity. Leads enterprise risk management strategies that balance innovation with public trust, privacy, and security.</p>
10%	<p><b>Executive Advisory and Interagency Collaboration</b></p> <p>Acts as a key advisor to the CIO, Executive Officer, Division Chiefs, and Bureau Directors on enterprise-wide technology strategy, innovation, and policy matters. Represents FTB in high-level interagency forums, CDT meetings, DoF meetings, legislative briefings, and statewide initiatives, influencing cross-departmental standards and advancing California’s digital government goals. Builds and maintains strategic partnerships with internal stakeholders, external agencies, and industry leaders to support collaborative innovation and shared service delivery. Leads enterprise-wide responses to complex legislative, political, and operational challenges, ensuring alignment with FTB’s strategic priorities and public accountability. Represents FTB before the Board, Legislature, and external stakeholders on matters related to enterprise technology, data, and innovation.</p>

## Marginal Functions

Percentage	Description
5%	Participates in executive-level recruitment, mentoring, and succession planning to strengthen leadership capacity within the department. Performs other related duties as required in support of the department’s mission and strategic goals.

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

Shavor, Nadean@FTB

Name (Print)	Signature	Date
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