STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 07/13/2026

HR Initials: VT

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
2627-00079	
Classification Title	**Position Number**
Analyst IV	564-582-5403-003
Working Title	**Bureau and Section**
Enterprise Strategic Planning Specialist	Planning and Project Oversight and Risk Mgmt. Bureau / Enterprise Planning and Project Section

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 general direction of the supervisor within the Enterprise Planning & Project Section, the incumbent uses the highest level of professional and technical skills to perform the duties of program coordinator for the bureau's enterprise business programs: Enterprise Risk Management (ERM), Strategic and Business Planning, and Enterprise Project Portfolio (EPP). Supports the manager of the Performance Management program and related key performance indicator (KPIs) processes, tools, and reports that enable the department to clearly evaluate and improve overall performance.

The incumbent, working independently, leads the formulation and ongoing refinement of the department's Strategic Plan; oversees the creation of accompanying Action Plan and Accomplishments Reports; and directs the development and alignment of Division and Bureau Business Plans to ensure consistency with the Strategic Plan. The incumbent additionally provides comprehensive guidance for the ERM and EPP programs, ensuring their coordination and full integration with the Strategic Plan.

Works with the Governance Council (GC) and Action Committees to align work products to strategic goals and meeting facilitations, trainings, professional presentations for executive management, and work with internal management and staff, as well as internal and external stakeholders.

Essential Functions

Percentage	Description
35%	Serve as the Strategic Plan program coordinator, which encompasses Business Planning efforts. Duties include: Direct the enterprise-level development, continuous refinement, and governance of the Franchise Tax Board's Strategic Plan, synthesize departmental accomplishments, and advise executive and senior leadership on emerging issues, strategic risks, and long-range organizational needs. Lead complex, high-impact strategic planning engagements, provide authoritative guidance and consultation to the Executive Officer, Chief Deputy, Chief Counsel, division management, and internal/external stakeholders, and shape department-wide strategic direction through expert facilitation and analysis. Coordinate and align the work of Action Committees with enterprise strategic goals, evaluate department-wide objectives and performance outcomes, design innovative operational processes, and recommend enterprise-level solutions to advance statewide program effectiveness and strategic coherence.

Percentage	Description
	Guide the development and integration of Division and Bureau Business Plans with the department's Strategic Plan, facilitate high-complexity strategy sessions, consult with leadership teams to ensure strategic alignment, and establish methodologies for measuring business plan outcomes and organizational performance. Oversee the enterprise Action Plan through expert analysis, continuous improvement, and governance, produce department-wide Accomplishments Reports that communicate impact to executive leadership, statewide partners, and external oversight entities. Deliver high-impact, data-driven strategic presentations to the Executive Officer, Chief Deputy, Chief Counsel, Action Committees, senior management, and cross-organizational audiences, communicate complex enterprise issues with clarity, and influence executive decision-making through expert analysis and strategic insight. Design and lead comprehensive enterprise training, awareness, and change management programs that advance department-wide understanding of the Strategic Plan and Business Planning frameworks, build organizational capability, and mobilize leadership and staff to execute strategic initiatives with consistency and alignment.
30%	Perform the most complex and specialized functions as the Enterprise Risk Management (ERM) program coordinator, managing report updates, reporting on accomplishments, and supporting executive and senior management needs. Duties include: Organize and lead enterprise-level Deep Dive workshops with division executives, guide complex, risk-focused discussions, identify emerging threats, and develop integrated mitigation strategies that shape department-wide risk posture. Present comprehensive quarterly risk assessments and trend analyses to the Executive Officer, Chief Deputy, Chief Counsel, and the Governance Council (GC), interpret enterprise risk exposure, and advise leadership on mitigation effectiveness and strategic impacts. Coordinate and consult with enterprise risk owners and division contacts to ensure the accuracy, alignment, and integrity of enterprise risks, enterprise watch points, division watch points, and mitigation strategies, strengthen department-wide risk governance through expert guidance. Conduct independent, high-level risk analyses to determine when risks should be elevated, closed, or reclassified, exercise expert judgment in recommending escalation to executive management and the GC based on statewide implications and organizational impact. Lead the end-to-end development, coordination, and preparation of the State Leadership Accountability Act (SLAA) report, ensure compliance with Government Operations Agency and Department of Finance requirements, and represent the department's enterprise risk posture with precision and authority. Design and deliver enterprise training, awareness programs, and engagement strategies that cultivate a robust, proactive risk management culture, equip leadership and staff with tools, frameworks, and knowledge to integrate risk principles across all operations.
15%	Function as the Enterprise Project Portfolio (EPP) program coordinator, updating the business and information technology project portfolio report, and supporting executive and senior management needs. Duties include: Function as the Enterprise Project Portfolio (EPP) program coordinator by overseeing the end-to-end development, validation, and publication of the department's project portfolio reports, ensure alignment with enterprise strategy, and support executive and senior management in high-stakes decision-making. Coordinate and direct enterprise-level analysis and governance of the EPP, deliver comprehensive quarterly status briefings to the Governance Council and executive leadership, and advise on portfolio risks, resource strategies, and statewide impacts.

Percentage	Description
	Design and implement advanced methodologies, governance structures, and performance metrics to mature the EPP program, establish enterprise standards that elevate visibility, accountability, and strategic alignment across the organization. Lead cross-department collaboration with project sponsors, division executives, program managers, and IT leadership to ensure accurate project reporting, strategic prioritization, and timely escalation of issues; serve as the authoritative consultant on EPP governance.
15%	Provide support to the manager of the enterprise Performance Management program in effort to identify, monitor, and report on KPIs to GC and senior management. Provide analytical support for the continuing development and improvement of the methodologies, strategies, and tools for the enterprise performance measures related to cost, productivity, and outcomes. Develop and present status reports of KPIs and improvement initiatives, incorporating statistical data into appropriate documents, spreadsheets, databases, charts, tables, and/or diagrams to evaluate the effectiveness of performance measures against objectives.

Marginal Functions

Percentage	Description
5%	Assist management, and the GC Chairperson and members as needed to perform special assignments, coordinate Executive Thought Conversation (ETC) sessions and develop artifacts. Assist with special projects assigned to the Section. Develop and maintain bureau website content related to the bureau's enterprise programs and other web content needs.

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 ______________

STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 07/13/2026

HR Initials: VT

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
2627-00080	
Classification Title	**Position Number**
Analyst IV	564-582-5403-006
Working Title	**Bureau and Section**
Enterprise Strategic Planning Specialist	Planning and Project Oversight and Risk Mgmt. Bureau / Enterprise Planning and Project Section

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 general direction of the supervisor within the Enterprise Planning & Project Section, the incumbent uses the highest level of professional and technical skills to perform the duties of program coordinator for the bureau's enterprise business programs: Enterprise Risk Management (ERM), Strategic and Business Planning, and Enterprise Project Portfolio (EPP). Supports the manager of the Performance Management program and related key performance indicator (KPIs) processes, tools, and reports that enable the department to clearly evaluate and improve overall performance.

The incumbent, working independently, leads the formulation and ongoing refinement of the department's Strategic Plan; oversees the creation of accompanying Action Plan and Accomplishments Reports; and directs the development and alignment of Division and Bureau Business Plans to ensure consistency with the Strategic Plan. The incumbent additionally provides comprehensive guidance for the ERM and EPP programs, ensuring their coordination and full integration with the Strategic Plan.

Works with the Governance Council (GC) and Action Committees to align work products to strategic goals and meeting facilitations, trainings, professional presentations for executive management, and work with internal management and staff, as well as internal and external stakeholders.

Essential Functions

Percentage	Description
35%	Serve as the Strategic Plan program coordinator, which encompasses Business Planning efforts. Duties include: Direct the enterprise-level development, continuous refinement, and governance of the Franchise Tax Board's Strategic Plan, synthesize departmental accomplishments, and advise executive and senior leadership on emerging issues, strategic risks, and long-range organizational needs. Lead complex, high-impact strategic planning engagements, provide authoritative guidance and consultation to the Executive Officer, Chief Deputy, Chief Counsel, division management, and internal/external stakeholders, and shape department-wide strategic direction through expert facilitation and analysis. Coordinate and align the work of Action Committees with enterprise strategic goals, evaluate department-wide objectives and performance outcomes, design innovative operational processes, and recommend enterprise-level solutions to advance statewide program effectiveness and strategic coherence.

Percentage	Description
	Guide the development and integration of Division and Bureau Business Plans with the department's Strategic Plan, facilitate high-complexity strategy sessions, consult with leadership teams to ensure strategic alignment, and establish methodologies for measuring business plan outcomes and organizational performance. Oversee the enterprise Action Plan through expert analysis, continuous improvement, and governance, produce department-wide Accomplishments Reports that communicate impact to executive leadership, statewide partners, and external oversight entities. Deliver high-impact, data-driven strategic presentations to the Executive Officer, Chief Deputy, Chief Counsel, Action Committees, senior management, and cross-organizational audiences, communicate complex enterprise issues with clarity, and influence executive decision-making through expert analysis and strategic insight. Design and lead comprehensive enterprise training, awareness, and change management programs that advance department-wide understanding of the Strategic Plan and Business Planning frameworks, build organizational capability, and mobilize leadership and staff to execute strategic initiatives with consistency and alignment.
30%	Perform the most complex and specialized functions as the Enterprise Risk Management (ERM) program coordinator, managing report updates, reporting on accomplishments, and supporting executive and senior management needs. Duties include: Organize and lead enterprise-level Deep Dive workshops with division executives, guide complex, risk-focused discussions, identify emerging threats, and develop integrated mitigation strategies that shape department-wide risk posture. Present comprehensive quarterly risk assessments and trend analyses to the Executive Officer, Chief Deputy, Chief Counsel, and the Governance Council (GC), interpret enterprise risk exposure, and advise leadership on mitigation effectiveness and strategic impacts. Coordinate and consult with enterprise risk owners and division contacts to ensure the accuracy, alignment, and integrity of enterprise risks, enterprise watch points, division watch points, and mitigation strategies, strengthen department-wide risk governance through expert guidance. Conduct independent, high-level risk analyses to determine when risks should be elevated, closed, or reclassified, exercise expert judgment in recommending escalation to executive management and the GC based on statewide implications and organizational impact. Lead the end-to-end development, coordination, and preparation of the State Leadership Accountability Act (SLAA) report, ensure compliance with Government Operations Agency and Department of Finance requirements, and represent the department's enterprise risk posture with precision and authority. Design and deliver enterprise training, awareness programs, and engagement strategies that cultivate a robust, proactive risk management culture, equip leadership and staff with tools, frameworks, and knowledge to integrate risk principles across all operations.
15%	Function as the Enterprise Project Portfolio (EPP) program coordinator, updating the business and information technology project portfolio report, and supporting executive and senior management needs. Duties include: Function as the Enterprise Project Portfolio (EPP) program coordinator by overseeing the end-to-end development, validation, and publication of the department's project portfolio reports, ensure alignment with enterprise strategy, and support executive and senior management in high-stakes decision-making. Coordinate and direct enterprise-level analysis and governance of the EPP, deliver comprehensive quarterly status briefings to the Governance Council and executive leadership, and advise on portfolio risks, resource strategies, and statewide impacts.

Percentage	Description
	Design and implement advanced methodologies, governance structures, and performance metrics to mature the EPP program, establish enterprise standards that elevate visibility, accountability, and strategic alignment across the organization. Lead cross-department collaboration with project sponsors, division executives, program managers, and IT leadership to ensure accurate project reporting, strategic prioritization, and timely escalation of issues; serve as the authoritative consultant on EPP governance.
15%	Provide support to the manager of the enterprise Performance Management program in effort to identify, monitor, and report on KPIs to GC and senior management. Provide analytical support for the continuing development and improvement of the methodologies, strategies, and tools for the enterprise performance measures related to cost, productivity, and outcomes. Develop and present status reports of KPIs and improvement initiatives, incorporating statistical data into appropriate documents, spreadsheets, databases, charts, tables, and/or diagrams to evaluate the effectiveness of performance measures against objectives.

Marginal Functions

Percentage	Description
5%	Assist management, and the GC Chairperson and members as needed to perform special assignments, coordinate Executive Thought Conversation (ETC) sessions and develop artifacts. Assist with special projects assigned to the Section. Develop and maintain bureau website content related to the bureau’s enterprise programs and other web content needs.

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