



Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Information Technology Manager I	Position Number 564-201-1405-xxx
Working Title Section Manager	Bureau and Section Tax Systems Modernization TSM Requirements Analysis 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 Tax Systems Modernization CEA, the IT Manager I serves as the TSM Requirements Analysis Section Manager, working closely and effectively with Tax Systems Modernization (TSM) Directors, FTB IT Managers and Business partners, contractors, and subordinate staff to provide Project Planning & Analysis leadership and guidance in the design and function of FTB business systems. This position has significant responsibility and functions as the business expert and Section manager, assisting with various IT initiatives focused on FTB's business and IT problems in effort to modernize FTB's technology systems. They will serve as an enterprise-wide liaison with management and subject matter experts to develop and lead requirements and engineering efforts. Will evaluate and recommend conceptual designs to meet IT and business initiative solutions, working with the Senior Management to identify risks and mitigation strategies. Accountable for proactive leadership, direction, coordination, and support of TSM project planning & analysis activities, demonstrating a depth of leadership, tact, and professionalism during internal and external collaborations, engaging in continual education in leadership, industry technology and best practices. These efforts support FTB's strategic goals of Operational Excellence by driving the optimal use of FTB's information technology resources to ensure maximum efficiency and Strong Organization by valuing and welcoming input from the enterprise and working in a collaborative fashion. The position provides services primarily within the *Software Engineering* domain.

Essential Functions

Percentage	Description
45%	Management and leadership of Project Planning & Analysis Section Manage and supervise a team of senior level analysts and subject matter experts to support and partner in business problem analysis, project planning activities, and the project approval lifecycle for the various IT modernization efforts ensuring compliance with project management standards. Oversee and facilitate the identification and documentation of detailed functional, data and technical (performance) requirements utilizing standardized requirements templates and Business Analysis best practices to ensure that new solutions fully meet the department's business objectives. Work closely with business leaders and system users through Joint Application Development (JAD) sessions to assist with the validation of deliverables to ensure the conceptual solution, high level design, and final application meet the business requirements.
30%	Tax System Modernization Project Support Develop and evaluate project alternatives, make decisions, and take appropriate action on those decisions in support of Tax Systems Modernization. Establish and maintain priorities to ensure the best use of project analyst resources. Effectively develop and use interdisciplinary teams to best meet project goals and objectives throughout the project lifecycle.



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	Identify the need for, and assure the establishment of appropriate administrative project procedures, coordinate the transition of the EDR processes, system improvements and enhancements into production. Present ideas and information effectively, both orally and in writing to project sponsors and stakeholders to ensure they are informed of project activities and timelines. Translate technical data processing terms into everyday language, so it is easily understandable to project partners, sponsors and stakeholders. Work closely with project sponsors and stakeholders in the development of deployment, implementation and conversion strategies, and plan to ensure projects achieve the desired objectives. Work with project sponsors and stakeholders to ensure project activities and deliverables effectively contribute to the department's strategic goals and operational initiatives.
20%	Project Planning Participate in conducting feasibility Study Reports, Request for Proposals, Budget Change Proposals, and Legislative Proposals in the preparation of planning documentation for future TSM projects. Support all Tax Systems Modernization activities including the planning, sizing, strategizing and development of the most complex formal technical requirements documents, reviews and walkthroughs to ensure that project activities meet the departments short and long term goals.

Marginal Functions

Percentage	Description
5%	Miscellaneous Attends meetings and FTB events as required, including representing FTB's on statewide projects. As needed, act as a backup to others within the management team.

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.

VACANT

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