



STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed

Proposed

Date Approved

08/13/2026

HR Initials

KH

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00038	Effective Date 11/01/2026
Classification Title Administrator IV, FTB	Position Number 564-622-4346-001
Working Title Assistant Bureau Director	Bureau and Section Special Programs 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 general direction of the Bureau Director, Special Programs Bureau, the incumbent serves as the Assistant Bureau Director within the Bureau. The Bureau is comprised of two sections, the Bankruptcy Section and the Specialized Collection Section. The incumbent works internally with all levels of management and staff and gains support of key individuals and teams, including the Franchise Tax Board (FTB) Governance Council, internal and external taskforces, department work groups, and FTB Action Committees. The incumbent ensures program goals and accomplishments are met and that flexible practices and procedures are in place to address and respond to a dynamic environment resulting from legislation, policy, stakeholders, overseers, and enterprise priorities. The incumbent is knowledgeable of the work performed throughout FTB and the Accounts Receivable Management (ARM) Division and understands, in detail, the activities and processes that produce FTB's products and services.

Essential Functions

Percentage	Description
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50%	Assists the departmental leadership in planning, developing, directing, managing, and organizing the strategic direction and activities of the department's Special Programs Bureau. Provides leadership in the development, evaluation, and review of collection policies and operational changes. Develops and communicates budget, planning, and operational goals and objectives via various communication methods. Establishes the review and evaluation process of the Special Programs Bureau regarding program review and analysis. Provides leadership and managerial direction to establish, reinforce, and monitor policies, business goals, strategies, priorities, and performance metrics to ensure the Special Programs Bureau staff are consistent with the departmental mission, values, and strategic plan. Assesses environmental factors and oversees program functions to ensure flexible practices and procedures are in place to address a dynamic environment resulting from legislation, stakeholders, overseers, economic fluctuations, and emerging technology.
35%	Directs the activities and advises the Bureau Director and Executive Management on best technological and operational solutions to resolve collection issues and new data sources to improve the efficiency of collecting delinquent accounts. Determines resources needed to achieve bureau and division business goals and reviews and evaluates the bureau's performance against those goals and modifies them as needed. Monitors work trends to identify potential issues that may impact resources, staffing allocation of funds or departmental programs, policies and procedures, and recommends any necessary modifications. Incumbent directs efforts to attain continuous operational improvement, including streamlining through business process and re-engineering. Serves as a department expert. Works closely with enterprise peers and the Accounts Receivable Management (ARM) Division to ensure program consistency and that departmental goals and objectives are met.
10%	Oversees and directs the transition of the major operational and policy changes with implementation to projects and studies to use new data sources and to improve the efficiency of collecting delinquent accounts. Directly involved in detailed development of business requirements and presenting the business case for policy changes. Incumbent acts as a backup and support to the Bureau Director in daily operations, such as, attending meetings, representing the bureau at hiring events, presenting on behalf of the bureau, and making operational decisions, when needed. Works in close partnership with their peer Assistant

	Bureau Directors, provides guidance on procedure development, changes, and implementation of new programs. Acts as a backup to the director of the Special Programs Bureau and performs other duties as required.
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Marginal Functions

Percentage	Description
5%	Stays abreast of collection, economic, and tax industry trends and issues. Oversees and directs methods to efficiently recruit, train, and develop all bureau staff including supervisors and managers. Demonstrates positive leadership skills by inspiring, influencing, motivating, coaching, and developing bureau managers, supervisors, and staff.

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