



## DUTY STATEMENT

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| <b>Request for Personnel Action (RPA) Number</b><br>ERPA-2627-00065 | <b>Effective Date</b><br>10/01/2026                                                      |
| <b>Classification Title</b><br>Program Specialist I, FTB            | <b>Position Number</b><br>564-760-4364-004                                               |
| <b>Working Title</b><br>Program Specialist                          | <b>Bureau and Section</b><br>Processing Services Bureau<br><br>Business Entities 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 Administrator I, independently audit the more complex exempt and nonprofit organizations. Provide technical and procedural guidance to the members of the unit when necessary. Present and/or develop training materials for the staff as well as fulfilling speaking engagements or consulting with various stakeholders on an as-needed basis.

## Essential Functions

| Percentage | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 50%        | Independently work the complex exempt organization audit workloads. Utilize Case Management for inventory management. Research, analyze and interpret tax law, revenue rulings, legal opinions, and write initial contact letters, follow up and position letters. Conduct all aspects of identifying the audit issues and complete the audit effectively and efficiently. Correspond and confer with attorneys, CPAs and other representatives of these organizations regarding complex technical issues relating to requirements for exemption. |
| 20%        | Analyze the most complex applications for exemption from tax to determine whether those organizations qualify for exemption under the Corporation Tax Law                                                                                                                                                                                                                                                                                                                                                                                         |

|     |                                                                                                                                                                                                                                                                                                                                                                     |
|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|     | and handle denials of exempt status. You utilize Case Management to manage the applications and inventory.                                                                                                                                                                                                                                                          |
| 10% | Perform lead duties including mentoring, reviewing audit work papers, and exemption application determinations of Associate Tax Auditors.                                                                                                                                                                                                                           |
| 10% | Develop and update technical and procedural manuals for use within and outside the section. Work on special projects that promote or enhance the Exempt Organization Unit's workflow process. Participate in public and private forums to discuss compliance program policies and gather information for policy consideration, legislative proposals, and training. |

## Marginal Functions

| Percentage | Description                                                                                                                                                                                                           |
|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5%         | In addition to the essential functions, perform other duties as required, including responding to special assignments and striving for professional development through self-study and departmental training classes. |
| 5%         | Do public presentations at various Non-Profit Seminars, educating the public on Filing Requirements for Tax Exempt Organizations.                                                                                     |

### 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