



STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed

Proposed

Date Approved

08/27/2026

HR Initials

TM

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00041	Effective Date
Classification Title Program Specialist II, FTB	Position Number 564-514-4365-005
Working Title Legislative Analyst	Bureau and Section Legislative Services Bureau Leg Policy Development 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 leadership of the Program Manager, the incumbent performs analysis of the most complex or omnibus proposed legislation relating to diversified subjects; acts as team leader and/or a resource for the most complex or omnibus legislation having department-wide and/or statewide impact; acts as a primary resource for technical, operational, and tax policy issues relating to legislation impacting the laws administered by the department; conceptually designs and drafts the most complex law relating for new programs, tax administration, or compliance matters that would have a significant impact on operational processes department-wide and/or statewide; with respect to the department's legislative analysis and development business function, assumes responsibility for identifying the operational problems, related solutions, and opportunities for improving performance of the group's work products.

Essential Functions

Percentage	Description
40%	Provide written analysis of the most complex or omnibus proposed legislation including conformity to federal income tax law that would significantly impact department-wide operational processes. Includes serving as team leader in development of the most complex analysis and representing the department in meetings and negotiations with legislative staff, representatives of the Administration, and/or industry representatives. Serve as the subject matter

	expert for technical, operational, and tax policy issues relating to legislation impacting the laws administered by the department as well as on new or precedent-setting tax issues.
30%	Conceptually design and draft laws at the request of legislators, FTB Board members, Administration, and departmental staff relating to tax legislation, tax administration, or compliance matters that could have significant impact on departmental tax policies and administrative and operational processes, including conformity with federal income tax law. Evaluate concepts, including identifying tax policy considerations and problems as well as proposing solutions and implementing strategies, ensuring that the legislation is written and implemented as legislatively intended.
20%	Provide technical tax law expertise to Legislative staff, practitioners, and other interested parties, such as other state and federal contacts. Independently identify and monitor issues that may impact departmental tax policies, administrative process and compliance activities from a political perspective. Participate in the development of responses to these related issues as requested by the Bureau director. Provide expert-level mentoring and quality control review to bureau staff on written products, such as bill analyses, tax form, and legislative change proposals. Support Bureau leadership in preparation of briefing materials for legislative committee hearings and stakeholder presentations.

Marginal Functions

Percentage	Description
10%	Assist the Program Specialist III on legislatively mandated projects or reports. Represent the bureau's perspective on enterprise projects. Serve as back up for colleagues that are out of the Office.

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



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DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00041	Effective Date
Classification Title Program Specialist I, FTB	Position Number 564-514-4364-XXX
Working Title Legislative Analyst	Bureau and Section Legislative Services Bureau Leg Policy Development 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 leadership of the Program Manager, the incumbent performs foundation analytical work related to legislation, and policy impacting tax administration and compliance. This includes independent research, interpreting, and preparing analyses on proposed & amended legislation. Acts as a leadperson and/or acts as resource for complex legislation having department-wide and/or statewide impact; acts as a resource for technical, operational, and tax policy issues relating to legislation impacting the laws administered by the department; conceptually designs or drafts minor amendments to law relating for new or existing programs, tax administration, or compliance matters that would have a significant impact on operational processes department-wide and/or statewide.

Essential Functions

Percentage	Description
40%	Provide written analysis for complex proposed legislation that would significantly impact department-wide operational processes, including federal conformity, simple tax credits and business entity tax law. Include acting as a leadperson or member in department-wide discussion on development of analysis. Represent the department in meetings and negotiations with legislative staff, representatives of the Administration, and/or industry representatives.

30%	In collaboration with Legal staff, draft minor amendments at the request of Legislators and department staff relating to new programs, tax administration or compliance matters that could have an impact on departmental policies and administrative and operational processes. Work collaboratively with department program contacts to identify tax policy considerations and problems and proposed solutions, and implementation strategies, to ensure that the program is implemented as legislatively intended.
20%	Provide technical tax law expertise to Legislative staff, practitioners, and other interested parties. Help to identify and monitor issues that may impact departmental tax policies, administrative process and compliance activities from a political perspective. Participate in issue identification, response development, and mitigation strategies upon request from Bureau leadership. Support Bureau leadership in preparation of briefing materials for legislative committee hearings and stakeholder presentations.

Marginal Functions

Percentage	Description
10%	Represent the bureau's perspective on enterprise projects. Serve as back up for colleagues that are out of the Office.

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