



Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
<u>2627-00348</u>	
Classification Title	Position Number
Adminstrator II	564-582-4357-003
Working Title	Bureau and Section
Enterprise Planning Manager	Guidance, Planning & Strategy Bureau/Enterprise Planning 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 Assistant Bureau Director of the Guidance, Planning & Strategy Bureau, the incumbent plans, organizes and directs the activities of the Enterprise Planning Section. Provide direct supervision to Section staff who perform enterprise planning services in the areas of: Strategic and Business Planning, Business Continuity Planning, Enterprise Risk & Portfolio Management, and Performance Management. The incumbent is a working manager who will provide expertise and guidance to the Governance Council (GC), Division and Bureau leadership teams and staff to align operations with strategic and business objectives. The incumbent will enhance, mature and continuously improve all enterprise programs listed above.

Essential Functions

Percentage	Description
40%	Plans, organizes, assigns and reviews the work of a team of specialists and experts over the Departments enterprise programs and functions. Provides mentoring, coaching, training and technical direction to support staff development and workforce planning. Establishes priorities and monitors workload progress to ensure assignments are completed accurately and within established internal and external oversight agencies deadlines. Conducts performance evaluations, provides ongoing feedback, and addresses performance issues in accordance with departmental policy. Communicates organizational priorities, policy changes and management decisions to staff and promotes collaboration across Section workloads. Act on behalf of the other Section Manager or supervisors as needed.
30%	Serves as the department's operational lead for the Business Continuity Program by providing direct oversight, technical leadership, and consultation to staff responsible for continuity planning and emergency preparedness activities. Oversees the management of the department's Business Continuity plans to ensure the Business Resumption Plans reflect business environment and restoration needs. Works with departmental business and IT staff to combine and strengthen the plans, conduct gap analysis to determine areas of potential weakness and leading efforts to identify and implement mitigation strategies. Works with GC and division staff to address potential limitations identified, identify policy issues and prepare recommendations and ensure timely plan revisions occur. Ensures all aspects of the Continuity Planning Program operate in compliance with State policy and procedures, develops new program strategies as necessary and coordinates with staff responsible for Emergency Response and Technology Recovery. Oversees activities to test and exercise plans and develop strategies to resume critical business functions. Serves as Business Continuity Coordinator in support of the EOC Director during activation of the EOC.

Percentage	Description
20%	Provides expert consultation and strategic guidance to executive management, program managers, and stakeholders on complex and sensitive issues impacting enterprise strategy, performance or risk. Maintains current knowledge of industry trends, emerging best practices, standards and governmental guidance applicable to Section programs, including performance management, business & strategic planning and enterprise portfolio management. Provides technical oversight of the department's critical and sensitive enterprise programs. Develops and communicates recommendations to FTB's Governance Council, Action Committees and senior management to improve and enhance Section programs.

Marginal Functions

Percentage	Description
10%	Serves as backup to Assistant Bureau Director. Participate in enterprise-wide efforts and projects, as needed.

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