



Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
2627-00345	
Classification Title	Position Number
Administrator IV	564-582-4346-002
Working Title	Bureau and Section
Assistant Bureau Director	Guidance, Planning and Strategy 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 Director, Guidance, Planning and Strategy Bureau, the incumbent provides senior leadership and oversight of enterprise programs, including IT Project oversight and governance, Business Continuity, Risk and Portfolio Management, Strategic and Business Planning, and Performance Management. The incumbent works with Bureau Director to formulate and implement policies related to all of these areas, and ensures that all policies, standards, guidelines; procedures and practices are developed and implemented in compliance with statewide and departmental policies and procedures. The incumbent works closely with the department's Governance Council and Action Committees on emerging and sensitive issues. Responsible for cultivating and maintaining collaborative relationships with external oversight partners and presents to the FTB Board as needed.

Essential Functions

Percentage	Description
40%	Secures and ensures enterprise alignment by collaborating with the Governance Council, Action Committees and FTB's senior management to understand business needs and strategic priorities. Ensures FTB's large scale and high impact technology solutions and projects are aligned with unified business priorities. Establishes and governs enterprise business processes to support strategic planning, portfolio management, and technology investment decisions. Leads executive level decision resolution where competing operational needs impact enterprise direction, resource allocation or project outcomes. Directs integration of business continuity and enterprise risk management activities with organizational strategy and governance frameworks. Represents and is primary liaison for FTB with external oversight partners, including California Department of Technology, Government Operations Agency and Department of Finance.
30%	Exercises full management duties to direct, mentor and evaluate subordinate managers responsible for critical enterprise program areas, including Enterprise Performance Management, Business Continuity, Enterprise Portfolio Management, and Business & Strategic Planning. Provides ongoing performance feedback and ensures accountability for meeting established goals, deadlines and service expectations of internal and external stakeholders, including the California Department of Technology, the Government Operations Agency and the Department of Finance. Reviews and approves staff decisions, workload distribution, and resource prioritization across program areas. Promotes a culture of accountability, collaboration and continuous improvement across managed programs.

Percentage	Description
20%	Establish Enterprise Performance Management framework that is aligned with the Strategic Plan, strategic objectives and executive direction. Directs the development of Key Performance Indicators, metrics and reporting across program areas. Ensures performance data is standardized, validated and suitable for executive decision making and FTB Board level reporting. Translate strategic priorities into measurable outcomes and performance indicators. Monitor key indicators and quarterly business reports to identify shortfalls and successes within each strategic goal and objective. Provides reporting to senior leadership, Governance Council and FTB Board as needed. Collaborate with the Bureau Director to develop and implement policies, procedures and standards.

Marginal Functions

Percentage	Description
10%	Act as backup for the Bureau Director. Participate on Action Committees and enterprise efforts, 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