STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 09/21/2026

HR Initials: AES

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
2526-02167	
Classification Title	**Position Number**
Analyst IV	564-189-5403-015
Working Title	**Bureau and Section**
Enterprise Procedures and Training, Team Lead	Organizational Development and Talent Management Bureau / Enterprise Talent 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 direction of the Administrator I of the Enterprise Procedures & Training (EPT) Team, in the Enterprise Talent Development Section's Enterprise Procedures & Training Program, the incumbent leads a team of Enterprise Procedures and Training Developers who are responsible for the development and maintenance of Enterprise Tax System (ETS) training and procedures materials. This effort involves monitoring system changes, analyzing impacts, integrating ETS training with division training, providing technical support, quality review and coaching, and performing and overseeing knowledge transfer activities. The incumbent is also responsible for supporting the most complex enterprise material updates and ensuring all procedures and training materials remain accurate and consistent. The incumbent is responsible for developing and implementing material standards and templates that continually meet the enterprise needs for new and existing staff. The incumbent will promote an environment and atmosphere of teamwork, collaboration, and cooperation consistent with the department's values across all workloads, interactions, and responsibilities.

Essential Functions

Percentage	Description
55%	Serves as the department's highest-level subject matter expert for enterprise tax system training and procedures, responsible for designing, developing, and maintaining all enterprise-level ETS training and procedures content— Computer Based Trainings, Job Aides, Quick Reference Guides, and the Enterprise Procedures Manual. Apply expert-level instructional design, advanced adult learning methodology, enterprise development standards, templates, and proprietary educational technology tools, such as Adobe Captivate and Vyond, and secure image and video system processes, to develop and maintain mission critical training products. Acts as the organizational senior level subject matter expert and team lead to Analyst IIs and Analyst IIIs for enterprise content quality assurance, training, establishing and enforcing standards for technical accuracy, procedural integrity, and enterprise-wide consistency across multiple tax systems and related processes. Ensures timely delivery of mission-critical materials by overseeing complex workplans, such as but not limited to monitoring all Change Requests (CRs) and Change Orders (COs) being implemented, ensuring they are accurately updated by the team in both the quarterly release and new hire/new user materials, monitoring completed staff work, and ensuring quarterly and annual project deadlines are being met. Also resolving conflicts that require expert judgment, validating, governing, and calibrating the quality and accuracy of training and procedures content across enterprise systems. Executes advanced technical evaluations, performs proprietary redaction and accuracy verification, and provides expert-level coaching. Maintains and oversees updates to all ETS training and procedures—Taxpayer Folder (TPF), Case Management (CM), Personal Income

Percentage	Description
	Tax Return Analysis (PIT RA), Business Entities Return Analysis (BE RA), MyFTB, Live Chat, Power of Attorney (POA), and related processes—requiring deep subject-matter mastery and analytical judgment at a level not replicable by any other position. Act as enterprise subject matter experts for Adobe Captivate, Vyond, and the Enterprise Procedures Manual (EPM). Additionally, must provide guidance to curriculum developers and procedures writers on teams ensuring their understanding and abilities to accurately and effectively communicate all changes impacting ETS into the materials, providing guidance and support to enterprise business partners to ensure enterprise and local efforts and materials remain aligned. Failure to do so may result in training materials being inaccurate for enterprise users causing users' inability to accurately utilize the Enterprise Tax Systems to complete the functions of their jobs, impacting enterprise revenue requirements, customer service goals, and other services supported by the day-to-day operations supported by the Enterprise Tax Systems EPT supports procedures and training for.
15%	Performs advanced, highly-specialized enterprise-level analysis of all ETS system changes and release impacts—work requiring unique expertise in ETS architecture, user workflows, and cross-system behaviors. Serves as the senior level EPT representative in Defect & Development Change Request forums; exercises expert-level discretion in prioritizing design changes and defect resolutions in products. Facilitates complex release-impact analysis meetings that require high-end interpretive skill and the ability to integrate multi-program impacts. Conducts advanced business process engineering using system design documentation to ensure training materials preserve operational integrity for the enterprise.
15%	Provides expert-degree consultative analysis to management, shaping enterprise-level training strategy, reengineering efforts, and organizational alignment. Develops complex onboarding frameworks and delivers specialized knowledge transfer requiring mastery of ETS design, functionality, and training methodologies. Serves as the enterprise's representative and subject-matter expert at Business Implementation Management (BIM), Power of Attorney, and other governance groups—roles demanding exceptionally deep understanding of ETS interactions and enterprise policy context.
10%	Operates as the enterprise's senior level subject matter expert guiding Enterprise Procedures Work Group and Training Work Group to ensure all cross-program training and procedure outputs remain synchronized, conflict-free, and strategically aligned. Executes complex governance responsibilities, including stewarding enterprise standards, approving scripts, resolving content discrepancies, and directing the synchronization of training materials independently and applying department and unit guidelines and policies. Maintains and updates the enterprise Training Materials webpage and publishes materials—tasks requiring detailed knowledge of enterprise system readiness, learning architecture, and content lifecycle management at the highest analytical tier. Participates in Communities of Practice for Instructional Design and Educational Technology, such as the California Network of Learning Professionals.

Marginal Functions

Percentage	Description
5%	Acts as the designated back-up to Administrator I, advising on enterprise risks, systemic impacts, and operational trends. Performs additional high-complexity duties, such as but not limited to templates, schedules, contingency plans, and training and development efforts appropriate to the classification to maintain continuity of enterprise training and procedural integrity.

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