STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed
Proposed
Date Approved
10/02/2026
HR Initials
SG

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00135	**Effective Date** 11/01/2026
Classification Title Analyst II	**Position Number** 564-735-5393-001
Working Title Recruiter/DTC/Hiring Analyst	**Bureau and Section** Filing Methods and Budget Bureau e-Programs and Budget 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 direction of an Administrator I, the incumbent is responsible for providing departmental support to the Filing Division (FD) management and staff. Preparation of various documents and reports requires the incumbent to be attentive to details and produce accurate results. The incumbent's responsibilities include all tasks related to the coordination and facilitation of recruitment-related activities within the FD. The incumbent will research, review, and evaluate recruitment trends and provide analysis regarding the potential impact these trends may have on the FD's various efforts. The incumbent will also be responsible for all functions related to division training coordination, including researching, reviewing, evaluating, and submitting training requests for the FD. In addition, the incumbent is also responsible for PC Coordination activities for the division, including coordination of staff moves, access management, and related support tasks. The incumbent will be responsible to assist in performing different tasks as they relate to the hiring process within the FD. The incumbent must be knowledgeable and up to date on all procedures and policies that could impact the FD related to recruitment, hiring, training, and PC Coordination. The incumbent is required to consistently exercise independence, good judgment, and initiative in performing complex and specialized assigned tasks.

Essential Functions

Percentage	Description

35%	Filing Division Recruiter Represent FTB and the division at in-person and virtual recruitment events, job talks, roundtables, and meetings. Travel to local off-site recruitment events. Responsible for building community partnerships that foster goodwill between the community and FTB in order to facilitate quality candidate pools for hiring efforts. Analyze recruiting data, develop and evaluate alternatives to improve efficiencies, and present ideas and information effectively, both orally and in writing, to management and the Recruiting Service Team and various FTB committees. Work with managers to develop and administer the FD recruitment plans that align with the FD hiring plan. Responsible for tracking recruiting and hiring trends, including new hire recruiter survey results, and providing detailed reports to management on how these trends may impact recruitment efforts, and/or hiring efforts. Responsible to update recruiting procedures, track and maintain recruitment data, review resumes and provide feedback to potential candidates, maintain social media accounts as it relates to recruiting, and manage a recruiting email ID.
35%	Division Training Coordinator Responsible for the oversight and maintenance of all training nominations and training records for staff within FD. Coordinate, prepare, submit, and maintain records of the Training Service Agreement (TSR), out-service training requests, and educational reimbursement requests. Facilitate the employee training request process and advise employees on policies and procedures regarding training. Update and maintain the LEARN database with essential division and employee training information. Enter the training requests and track the life cycle of the request and ensure the necessary steps are taken to close out the TSR. Communicate with and obtain appropriate signatures for approval and authorization when/where required. Review and maintain record of certificates of completion. Communicate training opportunities to division employees and consult with and advise administrators, or other interested parties, on a wide variety of training and education reimbursement related issues. Communicate with external vendors to obtain required documents and signatures as needed. Perform complex analysis of division's budgeted and projected spending for training classes and education reimbursements. Maintain a log of all TSR and educational reimbursements within the FD. Communicate verbally and in writing with FTB management and employees regarding financial budget, actual and planned spending, workload activity tracking, and training requests. Work in conjunction with the FD budget analysts and complete all duties in accordance with OEDS, Cal HR, and oversight authority's policy and procedure. Participate and attend DTC related meetings.
15%	PC Coordination Serve as the Filing Division (FD) telecom representative and PC/Planning coordinator for FD staff relocations and new recruitments. Manage all stages of staff transfers within the division, collaborating closely with facilities management. Handle the completion of necessary forms and requests related to PC movement, software installation/uninstallation, and data transfers. Manage the required documentation for phone access, Genesys access, and phone relocation. Function as the access coordinator for the FD, addressing access concerns and overseeing

	the authorization of program/software access through email and online forms. Initiate requests for PC administrator rights and mirroring and process pertinent forms for a variety of system accesses, including those for new hires, existing staff, and reactivation of accounts for returning personnel. Maintain a record of staff access, perform audits, and take corrective actions such as removing staff access or software programs when necessary to ensure security of access. Coordinate and communicate verbally and in writing with management and staff in processing moves and installs.
10%	Hiring analyst Provide support to divisional hiring managers by aiding in the facilitation and evaluation of recruitment initiatives utilizing available departmental or divisional resources and staff. Collaborate with the team lead, fellow analysts, supervisors, and hiring managers to ensure efficient and precise FD hiring processes. Assist hiring managers in various hiring activities, such as advising on timelines, suggesting resource requirements, reviewing, and submitting hiring packets to initiate the Request for Personnel action (RPA) procedure, appraising applications, organizing and coordinating interviews, communicating with candidates through email and phone, conducting score analysis, and delivering general guidance and evaluation of the hiring process. Educate hiring managers on HR policies, conduct intake meetings, and maintain regular communication through emails, check-in meetings, or other appropriate channels throughout the hiring process.

Marginal Functions

Percentage	Description
5%	Represent the section on teams, committees, or group projects regarding programs, issues, and procedures related to FD Hiring and Training Team programs.

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