



DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00121	Effective Date
Classification Title Program Specialist III, FTB	Position Number 564-514-4366-002
Working Title Legislative Lead Analyst	Bureau and Section Legislative Services Bureau Legislative Services

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 Bureau Director and the Assistant Bureau Director, the incumbent performs analysis of the most complex or omnibus proposed legislation relating to diversified subjects; mentor analysts and reviews all written products, including legislative analyses, special requests, projects, Summary of Federal Income Tax Changes (SOFITC) reports, tax forms, draft legislation, and legislative proposals. In addition, the incumbent acts as team leader on legislatively mandated projects and reports and provides guidance to internal and external stakeholders on technical, operational, and policy issues. The incumbent conceptually designs and drafts legislation and represents the Department before legislative committees, staff, and constituent groups.

Essential Functions

Percentage	Description
45%	Review the written products of bureau staff, including bill analyses, SOFITC reports, responses to special requests from internal and external customers, tax forms, and legislative proposals to ensure products are complete and accurate. Independently writes analyses of the most complex, sensitive, or omnibus proposed legislation that would significantly impact department wide operational processes. Serve as a team leader in the development of the most complex analyses and representing the department in meetings and negotiations with legislative staff, representatives of the Administration, and/or industry representatives. Act as a primary resource 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.
25%	Conceptually design and independently draft highly technical or politically sensitive laws at the request of legislators, Franchise Tax Board (FTB) Board members, Administration, and departmental staff relating to tax legislation, tax administration, or compliance matters that would have significant impact on departmental tax policies and administrative processes. 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. Provide mentoring to bureau staff during the review of written products, such as bill analyses, special requests, tax forms, and legislative change proposals.

Marginal Functions

Percentage	Description
5%	Act as team leader on legislatively mandated projects, reports, or other projects. Prepare talking points for testimony before legislative committees. Represent the bureau's perspective on enterprise projects. Serve as back up for colleagues that are out of the office.
5%	Develop technical training materials and presents technical tax law training, primarily in the areas of new law and federal conformity, to both internal and external customers, such as the Tax Practitioner's Institute

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

