STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed
Proposed
Date Approved
10/21/2026
HR Initials
CB

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00124	**Effective Date**
Classification Title Analyst IV	**Position Number** 564-184-5403-004
Working Title Worksite Security Project Manager	**Bureau and Section** Privacy, Security and Disclosure Bureau Security Services and Compliance 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 Worksite Security Supervisor, within Security Services and Compliance Section, the incumbent serves as the Project Manager (PM) for critical, sensitive, and complex Physical Security and IT Security Technology infrastructure projects across the enterprise. The incumbent will also provide consultative services as it relates to enterprise security requirements, physical security technology equipment, and technical requirements to integrate existing infrastructure, and will maintain and update data to determine risk.

The incumbent will regularly contact and meet with customers, departmental Information Technology (IT) staff, vendors, and external entities to coordinate services, proactively conduct research and identify methods to improve departmental security measures and promote policy and procedural compliance. The incumbent will consult/assist/lead and coordinate activities in the preparation of feasibility study reports, cost/benefit analysis, annual licensing renewals, funding strategies and the analysis of budgetary and resource issues.

All duties are performed within the framework of the Department's mission and values, and in accordance with law, policy, standards, and procedures.

Essential Functions

Percentage	Description

40%	Responsible for directing all aspects of IT and physical security project planning, preparation, and will coordinate all work of others in these areas. Responsible for task completion and ensuring project deadlines are met. Responsible for providing leadership, facilitating, coordinating and directing work to complete Physical Security and Security Technology projects. Provide consultative services related to security requirements, Physical Security Technology equipment, and technical requirements to integrate existing infrastructure. Prepare project plans, develop project milestones to complete projects within desired timeframes, scope, and resources. Work with departmental staff and management to secure resources and necessary approvals for implementation of physical security and IT security technology infrastructure projects. Provide vendor service oversight, contract administration, budget allocation recommendations, and assistance with procurement activities. Keep Bureau level executive management appraised of project status for proposed and ongoing projects and maintain current risk scoring documents.
25%	Provide consultative services related to security requirements, Physical Security Technology equipment, and technical requirements to integrate existing infrastructure. Draft Security Technology floor plans, identify and implement new operational procedures related to Security Technology improvements for the enterprise. Maintain an awareness of appropriate sections of law, industry trends, information security and technology policies and standards and Franchise Tax Board (FTB) business practices.
25%	Conduct research and prepare issue papers, determine appropriate funding strategies to support project work, and evaluate alternatives. Perform project research, develop Scope of Work documents, develop, and maintain Security Technology maintenance contracts, Design and deliver presentations for a variety of audiences.

Marginal Functions

Percentage	Description
5%	Occasional travel to FTB offices as needed to perform job functions. May require work outside normal hours or to support after-hours response on an as-needed basis.
5%	Support Worksite Security teams during their response to campus emergencies.

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