STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed
Proposed
Date Approved
10/15/2026
HR Initials
SC

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00126	**Effective Date**
Classification Title Information Technology Manager I	**Position Number** 564-231-1405-001
Working Title Return Analysis Case Management Services Manager	**Bureau and Section** Enterprise Tax Systems Bureau Return Analysis Case Management Services 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 administrative direction of the Assistant Director in the Enterprise Tax Systems Bureau, the IT Product Manager is the named product owner, and section manager, and is fully accountable for one or more department software products and the cross functional Software Development Lifecycle (SDLC) units that deliver, operate, and evolve them. The position provides strategic and operational leadership across systems analysis, solution assessment, development, testing, release management, maintenance, and incident response. The IT Product Manager ensures product alignment to program objectives and stakeholder needs, balances new feature delivery with technical debt reduction, advances evolving technical practices (e.g., CI/CD, automated testing, DevOps/infrastructure as code, observability) as technically feasible and in alignment with departmental goals and priorities, and sustains excellent customer service. The role includes responsibility for workload and release planning, delivery metrics and governance, and staff development, cross training, and succession planning to ensure workforce continuity.

The Section Manager supervises IT professional staff, including but not limited to Product Owners, Unit Supervisors/Managers, Systems Analysts, Software Developers/Engineers/Leads/Subject Matter Experts, QA/Testers, Release Managers. Indirectly, it may coordinate with vendor teams and other departmental units through matrixed supervision to ensure end-to-end lifecycle support and completion of work, incident management, and/or project management duties. The Section Manager represents the Bureau in

various activities including divisional and departmental meetings. The position provides services which encompass the IT domain of Software Engineering.

Essential Functions

Percentage	Description
45%	Manage the end-to-end product SDLC for assigned applications and automated solutions: define and maintain product roadmaps, prioritize the product backlogs, and lead release planning activities to meet program area and regulatory timelines. Manage team workload and capacity across multiple SDLC functions including solution assessment, systems analysis, development, testing, release management to ensure predictable, timely, and high-quality deliveries. Balance enhancement work with system sustainment. Identify and implement technical debt remediation efforts; establish and oversee maintenance plans to ensure system reliability, security, performance, and compliance. Champion the adoption and ongoing improvement of technical practices (CI/CD, automated testing, infrastructure as code, observability, automated deployments, highly secure solutions). Evaluate and implement tooling to enhance delivery consistency and product quality. Act as a contract manager and manage procurement processes including planning, forecasting, contract manager duties, and oversight to ensure contracts meet departmental objectives and are in the best interest of the State. Recruit, mentor, evaluate, and retain high performing staff. Establish performance periods and conduct performance evaluations, manage probationary periods, and take corrective or disciplinary action as needed in accordance with State and FTB policy. Develop and implement training, cross-training, and succession plans and assign developmental projects to build organizational knowledge and ensure workload coverage and continuity.
20%	Serve as primary product liaison to program areas, other technical partners (including but not limited to Operations, Infrastructure, Security, other product SDLC teams), senior management, and external partners; translate program needs into actionable technical solutions, clearly articulating tradeoffs, risks, and delivery timelines. Deliver regular written and oral updates including roadmap briefings, release advisories, and post-release communications to stakeholders. Represent the Bureau and Technology Services Division in internal and external meetings and workshops with partners such as the IRS, other states, and California agencies involving product integration, data quality, governance, and program requirements.
15%	Lead multi-team incident response and resolution activities in accordance with ITIL best practices and divisional processes and procedures to restore service, ensure data integrity, and minimize impact to customers. Oversee root cause analysis, problem analysis and resolution, and post-incident reviews and drive corrective actions and follow-up to prevent recurrence and foster continuous improvement.
15%	Define, collect, and analyze key product and delivery metrics such as lead time, cycle time, deployment frequency, defect trends, mean time to restore, technical debt indicators to support data-driven decisions in resource allocation, budget

	planning, and continuous process improvements. Conduct cost analysis for large change requests and legislative mandates in alignment with divisional costing frameworks and tools; contribute to section budgeting and training plans. Lead process improvement initiatives to streamline the SDLC, increase automation, reduce operational risk, and align practices with enterprise standards.

Marginal Functions

Percentage	Description
5%	Participate in and support department and divisional initiatives, working groups, and cross functional teams that further organizational objectives. Serve on special projects or task forces as assigned and represent the Bureau in interdepartmental efforts. Provide leadership backup and assist other managers or leaders as needed to ensure continuity of operations and successful delivery of critical work.

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