STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed
Proposed
Date Approved
10/28/2026
HR Initials
SS

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00154	**Effective Date** 01/25/2027
Classification Title Information Technology Specialist II	**Position Number** 564-218-1414-002
Working Title EA EPS Section Lead	**Bureau and Section** Chief Technologist Office EA Education & Professional 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 Enterprise Architecture Office (EAO), Enterprise Architecture (EA) Education & Professional Services Section Manager, the IT Specialist II serves as the section lead, working closely with FTB's managers, technicians, architects, and business partners to provide advanced EA analysis, education on existing and emerging technical capabilities that align with the strategic design and function of FTB's current and future business processes and technology solutions, and consultation services, continually moving the department towards our "To Be" state while supporting citizen development initiatives across the enterprise via the EA Technology Academy. With limited guidance, maintains and applies strong business and technical knowledge of FTB systems of work including business processes, procedures, standards, and technologies, with a primary focus on educating and empowering clients, connecting people to technology through the careful application of architectural best practices, mentoring, and job relevant training in support of FTBs strategic direction. In the lead capacity, EA Education & Professional Services is key to ensuring uptake and implementation of EA strategic plans, providing guidance through formal education in the form of targeted hands-on technical training that leverages technology aligned with EA's strategic direction. Supports FTB's EA program maturity and actively engages in all facets of EA services and core functionality including EA strategy, governance, operations and compliance,

education and professional services, and Architecture Review Board (ARB). Demonstrates advanced depth of leadership, tact, and professionalism during internal and external collaborations, engaging in continual education on industry technology and best practices, digital transformation, and operational trends to help identify and guide projects and initiatives that provide the greatest value to the department and citizens of California. These efforts support FTB's strategic goals of Operational Excellence by driving the optimal use of FTB's information technology resources to ensure maximum efficiency and Strong Organization by valuing and welcoming input from the enterprise and working in a collaborative fashion. The position provides services primarily within the System Engineering, Business Technology Management, and IT Project Management domains.

Essential Functions

Percentage	Description
50%	Provides clear leadership, expertise, and organization to the EA Education & Professional Services Section. Defines, establishes, and gathers key performance indicators/metrics for workload traceability to support capacity planning, delegates assignments, and maintains availability to the analysts for guidance and support. Maintains knowledge of existing and emerging enterprise technologies and capabilities and collaborating closely with EA core teams to identify and recommend appropriate Academy courses or additions as well as potential Engagements for the section. Performs as escalation contact, mentor, and hand-on expertise for more complex or time-sensitive activities in support of the EA Technology Academy and EA Professional Services duties outlined directly below. Participate in ongoing improvements to service delivery framework for Professional Services providing technical consultation and implementation services to customers within the department while supporting EA's strategic direction. Partners with department consumers to develop & implement solutions to business problems with technology that aligns with EA strategic path. Provides technical services to vet out new technical capabilities in alignment with EA strategic direction. Build out and maintains EA lab, ensuring lab environment is functioning well and stays within budgetary constraints. Researches and recommends new technology products, solutions, and standards providing technical expertise and direction while ensuring master planning and implementation of the department's technology aligns with business strategy. Maintains extensive technical knowledge and expertise on evolving technology trends, best practices, and standards moving the department toward standardization of our operating systems and platforms to help control IT costs and simplify support. Maintains knowledge and understanding of FTB's business areas, capability models, and challenges to identify opportunities for engagements. Provides skilled scrum master services and maintains understanding of agile methodology and best practices both internal and external to FTB.

45%	Identifies and prepares relevant marketing materials and presents EA Technology Academy opportunities to the enterprise, identifying students for each cohorts and facilitating the schedule and planning for each cohort kick-off through wrap-up. Identifies appropriate curriculum for target audience based on topic and intended level of expertise for the specific course. Includes maintaining expertise on the technologies required to educate the cohorts, aligning with EA current and future architectures, emerging strategies, and methodologies. Develops materials to support the course curriculum, ensuring materials are clear, concise, and usable to the targeted students in the academy course. Materials may include technology “how-to” manuals, CBTs, and practical hands-on materials, setting up labs and lab environments, as well as application of the training to various FTB business services or needs. Leads and facilitates hybrid training courses on specific EA Academy topics/courses using approved curriculum & materials, demonstrating tact, patience, and professionalism. Represents EAO in educating students with how the curriculum/course objectives supports EA’s target architecture. Develops and presents course evaluations and other course surveys to cohort members and across the enterprise, analyzing response to identify improvements contributing towards continuous improvement of the Academy and the educational service it provides. Provides EA resource artifacts like checklists and reference architecture, validating design is in alignment with strategic objectives. Research, test, and recommend viable solutions to business problems, including internal to EA’s business, leveraging EA’s templates and best practices. Assists with the development, maintenance, and marketing of EA related services and educational content, and develops and maintains EA repository ensuring ease of use for EA resource access. Reviews industry trends for digital transformation, provides recommendations on areas to grow or mature, assists in maturing FTBs EA program, provides input and viable solutions for EA metrics, capacity planning, and overall betterment of the EA Office. Maintains strong technical knowledge and expertise on evolving technology trends, best practices, and standards moving the department toward standardization of our operating systems and platforms. Advocates, educates, and updates standards as technologies evolve to better meet and support business. Develops and delivers technical and operational presentations to groups and governance bodies as needed to keep the enterprise up to date on strategic direction of the department’s technology stack. As an EA Analyst, demonstrates professionalism, planning and organization, facilitation and collaboration, leadership, responsibility, and communication. Provides specialty knowledge to other areas of EA, including but not limited to presentations, participating in core workloads; may be hands on tactical or may be strategic. Provides hands-on work related to areas of educational expertise.

Marginal Functions

Percentage	Description
5%	Performs special assignments, to include lead/participate with other initiatives. Attends meetings and FTB events as required, including representing FTB's on statewide projects. As needed, acts as a backup to other EA team members.

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