STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed
Proposed
Date Approved
11/03/2026
HR Initials
CB

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00157	**Effective Date**
Classification Title Business Service Officer I (Specialist)	**Position Number** 564-185-4720-007
Working Title Fleet Program Coordinator	**Bureau and Section** Business and Human Resources Bureau Business 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 supervision of the Administrator I, the incumbent is responsible for a variety of functions of average difficulty that require customer service and basic analytical skills. Acts as the department's liaison with the Department of General Services (DGS) in administrating the Fleet Management Program. Coordinates the monthly reconciliation and workload reports for Fleet activities. Ensures DGS Office of Fleet Administration (OFA) regulations are enforced. Analyzes fleet and equipment usage, develops equipment specifications, and submits procurement documents. Provides research, planning, and forecasting for budget and development projects.

Essential Functions

Percentage	Description
50%	Manages and controls the Department's motor pool for vehicles and materials handling equipment. Provides quality control and enforcement for the Office Fleet Administration (OFA). Assists in managing and coordinating various fleet projects including all related activities such as: equipment inventory, database management, repair and maintenance scheduling, development of equipment specifications, preparation of procurement documents, review and reconcile invoices including verification of cost, job completeness, and approval payments.

30%	Acts as Franchise Tax Board's (FTB) Liaison with control agencies, vendors, and business partners in regards to Fleet Operations. Develops timelines and project status reports and prepares projects related to technical correspondence and memorandums. Prepares and submits the annual report to the Fleet Asset Management System (FAMS) at DGS. Performs the technical tasks associated with the compilation, analysis data for use in generating charts, graphs, monthly reports, and other documents. Makes recommendations to management. Ensures all reports are accurate and historical records.
15%	Develops and maintains fleet procedures for central and district offices. Provides education sessions for department staff. Provides forecasting, reconciliation, and analysis of fiscal year expenditures. Provides budget estimates to management and the department budget office. Based on budget projections and previous year’s expenditure, assists with preparation and annual Schedule 3 budget allotments.

Marginal Functions

Percentage	Description
5%	Establishes re-stocking points and processes proper documentation to replenish or re-order stock. Assists in other Business Services support service areas.

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