STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed
Proposed
Date Approved
11/10/2026
HR Initials
VT

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00133	**Effective Date**
Classification Title Administrator III, FTB	**Position Number** 564-514-4352-001
Working Title Program Manager	**Bureau and Section** Legislative Services Bureau Leg Policy Development 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

The Legislative Service Bureau (LSB) provides the services needed to ensure legislation that affects the department's programs can be administered. LSB does this by: (1) maintaining positive working relationships with the Legislature, the Administration, and the three-member FTB Board, and various other external stakeholders; (2) providing timely, accurate, and objective analyses; (3) drafting technically correct legislation; and (4) maintaining an environment of responsiveness to our customers.

Under the general direction of the Assistant Bureau Director, the Program Manager is responsible for the day-to-day operations of LSB including supervising a team of legislative analysts, managing the workflow of legislative bills and special requests, maintaining the annual work plan, and planning or overseeing internal and external staff training. The Program Manager coordinates and facilitates all department-wide events necessary to manage the legislative workload as session begins and ends and any strategic meetings needed to triage emergent or sensitive issues or proposals from external stakeholders. In addition, the Program Manager maintains awareness of the legislative bill hearing schedule and coordinates with legislative staff as appropriate to ensure LSB work products are complete and available timely.

Essential Functions

Percentage	Description

40%	Directly supervises legislative analysts responsible for developing, evaluating, and analyzing all proposed changes to Personal Income Tax and Franchise Tax laws at all levels of complexity and sensitivity. Reviews bill analyses, drafting requests, and special requests from internal or external stakeholders for accuracy, completeness, consistency, and determines when additional research, revision, or escalation is required. Establishes section-wide work expectations, monitors performance metrics, and provides direction and coaching. Conducts workforce planning, recruitment, and coordinating with the management team on succession planning efforts. Identifies and evaluates staff training and development needs and coordinates with the management team, LSB leads, and the Legal Division to ensure internal and external training plans are executed. Plans and coordinates recruiting and hiring efforts.
30%	Manages and directs the legislative workflow protocols used to identify, track, and evaluate proposed state legislation impacting FTB's administration of income and franchise tax laws. Tracks bill analyses and special requests from the California Legislature, Government Operations Agency, and the Department of Finance to ensure deadlines are met. Establishes workload priorities based on legislative deadlines, complexity, stakeholder sensitivity, and departmental operational impact. Resolves competing workload demands and adjusts staff assignments, negotiates delivery dates when appropriate, and leads or expedites review of urgent or high-profile issues as needed. Evaluates sensitive or significant legislative issues, determines if additional technical review is needed, and makes recommendations on matters requiring executive management direction. Coordinates with the Economic and Statistical Research Bureau and Financial Management Bureau to obtain revenue and administrative cost estimates and resolves issues affecting timely completion of legislative analyses.. Works with the Senate and Assembly Committee staff to ensure hearing schedules, deadlines, and deliverables are met.
20%	Attends legislative hearing and related meetings to support the Bureau Director and Assistant Bureau Director. Coordinates and facilitates department-wide legislative activities including all events necessary to manage legislative workloads as session begins and ends and any strategic meetings needed to triage emergent or sensitive issues or proposals from external stakeholders. Through these activities, identifies issues affecting legislative readiness and determines actions needed to address emerging workload demands. Responsible for preparing and managing the annual LSB work plan based on legislative calendars, timelines, and schedules.

Marginal Functions

Percentage	Description
10%	Responsible for developing and managing the bureau's annual budget spending plan and completing special projects and assignments as directed. The incumbent acts as the back up to the Assistant Bureau Director as needed.

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