STATE OF CALIFORNIA
Franchise Tax Board

Proposed

HR Date: 11/13/2026

HR Initials: VT

Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title	**Position Number**
Career Executive Assignment (CEA B)	564-552-7500-001
Working Title	**Bureau and Section**
Director, Financial Management Bureau	Financial Management Bureau

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 Division Chief, Finance and Executive Services Division, Director, Financial Management Bureau (FMB) serves as an enterprise-level financial policy advisor to the Division Chief, the Executive Officer, and executive management on fiscal policy issues. These responsibilities directly impact the formulation of departmental fiscal policies, executive decision-making, program development, program effectiveness, and the quality of services provided to the public. The incumbent works closely with the Division Chief, Executive Officer and the Executive Management Team by providing strategic financial policy advice and directing the financial operations of the Department. Maintains control over the department's spending and allocation of funds to support legislative mandates. The FMB Director develops and maintains liaison with control agencies and the Legislature regarding the department's fiscal needs and strategic operations, and can represent the department before Legislative Committees, the Department of Finance and the FTB Board itself on a broad range of issues. The incumbent is tapped to lead various statewide initiatives in conjunction with other agencies to improve overall state operations and leads or participates in a number of high-level governance committees within FTB. Through subordinate managers, the FMB Director directs the functions and activities of the External Budget Office, Accounting, and Internal Budget Office Sections.

Essential Functions

Percentage	Description
35%	Develops the corporate financial perspective on department-wide fiscal policy issues to assure the link between internal planning and budgeting. Identifies, evaluates, and interprets program policies relating to the department's fiscal integrity and administration of its programs, and reviews legislation with fiscal impact. Evaluates and determines the financial impact of the department's major capital investments, technology projects and business initiatives, providing information and recommendations to the Chief Financial Officer (Division Chief), Executive Officer and Executive Management throughout the department for use in formulating major policy decisions and establishing the department's strategic direction. Recommends if new initiatives can be funded through existing departmental resources or if a budget change is warranted. Develops and maintains strategic relationships with key principals at control agencies and the legislature.
30%	Develops and supports the department's enterprise metric program. Evaluates the department's plans, policies and long-range goals to track established performance measures for key programs and initiatives throughout the department; compares strategic progress with short-term operational results; provides guidance and direction to the design of departmental accounting, costing and revenue reporting systems and facilitates the implementation of such systems to enable managers throughout the department to monitor, report and evaluate their programs based on key performance metrics from the enterprise and divisional perspective.

Percentage	Description
15%	Responsible for administration of enterprise-level general fund appropriations exceeding $1 billion annually in accordance with Generally Accepted Government Accounting Standards, the State Administrative Manual, and administrative mandates from the Legislature and FTB overseers. As director of the Financial Management Bureau, is responsible for the delivery of timely and accurate financial statements, adherence to Federal Information Security Modernization Act (FISMA), ensuring that proper internal accounting controls are developed and followed, and responsible for financial risks for FTB.
15%	Serves as the chair of the Resource Allocation Action Committee (RAAC), providing corporate perspective and financial advice and leading the committee in making broad spending decisions which impact increased efficiencies, improved quality, or better leverage infrastructure at the enterprise level. Determines the allocation of resources for department-wide priorities, whether through redirection of existing FTB resources or required budget augmentation. This includes staffing resources and Operating Expenses and Equipment (OE&E) fund allocations throughout FTB. Ensures collaboration among bureaus and divisions to ensure that resources are used cost-effectively. Participates on and provides executive leadership to various intra- and interdepartmental committees and teams tasked with consolidating government functions, creating efficiencies, improving the state's revenue collection, and/or providing better enforcement of tax laws. Serves as a member of various departmental governance action committees and teams including RAAC and Joint Action Committee (JAC).

Marginal Functions

Percentage	Description
5%	In the Division Chief's absence, serves as the acting Division Chief by attending and participating in Governance Council meetings and assuming various division leadership responsibilities.

Signature Authorization

If I choose to sign this form electronically, I agree that my electronic signature is a legally binding equivalent to my handwritten signature on a paper form.

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