STATE OF CALIFORNIA
Franchise Tax Board

**Current or Proposed**
Proposed
**Date Approved**
11/16/2026
**HR Initials**
CB

# DUTY STATEMENT

| **Request for Personnel Action (RPA) Number**<br>ERPA-2627-00178 | **Effective Date** |
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| **Classification Title**<br>Analyst IV | **Position Number**<br>564-184-5403-003 |
| **Working Title**<br>Privacy Program Lead | **Bureau and Section**<br>Privacy, Security and Disclosure Bureau<br><br>Privacy, Disclosure and Safeguards 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 general direction of the Administrator II for the Safeguards and Privacy Programs, the Privacy Program Lead (Analyst IV) serves as the department's senior technical expert for privacy, sensitive information protection, and enterprise compliance with statewide and federal privacy requirements. The Analyst IV operates with a high level of independence and provides guidance on the proper handling of Personal Identifiable Information (PII), State Tax Information (STI), Non-Tax Information (NTI), and Federal Tax Information (FTI). The Analyst IV leads complex privacy and safeguard activities, advises executive leadership and program areas, and ensures departmental compliance with California Department of Technology (CDT) privacy policy, California Civil Code, State Administrative Manual (SAM), State Information Management Manual (SIMM) requirements, National Institute of Standards and Technology (NIST) frameworks, IRS Publication 1075 (Pub 1075), and departmental privacy standards.

## Essential Functions

| Percentage | Description |
|---|---|
| 40% | Serves as the department's subject matter expert independently overseeing all activities required to maintain enterprise-wide compliance with Californina Department of Technology (CDT) privacy mandates, Internal Revenue Service (IRS) Publication 1075 (Pub 1075), State Administrative Manual (SAM), State Information Management Manual (SIMM), National Institute of Standards and Technology |

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| | (NIST) frameworks, California Civil Code, and departmental privacy standards. Provides expert consultation to leadership, Technology Services Division (TSD), procurement, legal counsel, and program areas on the appropriate use, handling, and protection of Personal Identifiable Information (PII), State Tax Information (STI), Non-Tax Information (NTI), and Federal Tax Information (FTI). Performs structured analytical evaluation of legislation, workflows, technical proposals, and project designs to assess privacy impacts and ensure appropriate protections are applied across the organization. Administers, conducts, and evaluates CDT SIMM 5310-C Privacy Threshold Assessments (PTA) and Privacy Impact Assessments (PIA) for systems, applications, business processes, and emerging technologies, including Generative AI (GenAi) as well as the Safeguards and Privacy Assessment (SPA). Develops and maintains departmental privacy policies, procedures, guidance documents, and compliance strategies. |
| 30% | Oversees and directs the integration of privacy and safeguard requirements across enterprise systems, projects, contracts, procurement documents, operational workflows, and data exchange processes. Engages with program areas to facilitate discussions and delivers guidance on mitigating and remediating privacy risks, applying privacy principles, implementing protective controls, and fulfilling regulatory obligations. Performs peer reviews of complex privacy and safeguard risk assessments technical documentation, contracts, and reports to ensure accuracy, consistency, and alignment with departmental and statewide standards. Examines sensitive materials—including tax forms, specifications, contracts, and operational documents—to verify that privacy notices, protections, and compliance requirements are appropriately applied. Contributes subject matter expertise to enterprise work products such as issue papers, research papers, and business process evaluations. |
| 20% | Supports the Safeguards Program to ensure enterprise compliance with IRS Pub 1075 and secure handling of FTI across all departmental offices. Performs analytical reviews of systems, processes, facilities, and physical environments to evaluate safeguard controls, vulnerabilities, and risk exposure. Assists in developing, implementing, and documenting safeguard procedures required to maintain a robust departmental Safeguards Program. Collaborates with the Safeguards Lead to manage federally mandated workloads, including Governmental Liaison Data Exchange Program (GLDEP), Safeguard Security Report (SSR) submissions, 45-Day Notifications, Corrective Action Plan (CAP) reporting, IRS Technical Inquiries (TI), and other IRS requirements. Reviews Data Exchange Agreements and provides authoritative guidance to the enterprise ensuring adequate handling practices and protections are in place for PII, FTI, STI, and NTI. |

## Marginal Functions

| Percentage | Description |
|---|---|
| 10% | Develops, delivers, and maintains enterprise-wide privacy and safeguard training, outreach materials, and awareness initiatives. Updates internal and external program content, including public-facing web pages, guidance documents, and |

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| | departmental communications. Responds to inquiries received through program email inboxes and provides timely and accurate guidance to business partners and reporting entities. Represents the department in cross-functional initiatives, enterprise committees, and interagency collaborations related to privacy, safeguards, and confidential information protection. May lead enterprise initiatives, special projects, or project teams as assigned. |

**Employee:**

I confirm that I have read and understand the described duties and functions of this position.

| Name (Print) | Signature | Date |
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**Supervisor:**

I certify that the above information accurately represents the described duties and functions of this position.

| Name (Print) | Signature | Date |
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