STATE OF CALIFORNIA
Franchise Tax Board

Current or Proposed
Proposed
Date Approved
11/19/2026
HR Initials
VT

DUTY STATEMENT

Request for Personnel Action (RPA) Number ERPA-2627-00195	**Effective Date**
Classification Title Administrator III, FTB	**Position Number** 564-624-4352-001
Working Title Section Manager	**Bureau and Section** Advisory, Analysis & Services Bureau Policy & Division Support 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 Accounts Receivable Management Division (ARMD) Analysis, Advisory and Services Bureau (AASB) Assistant Bureau Director, the incumbent has managerial responsibility over teams comprised of support, paraprofessional, and professional classifications in the Collection Account Resolution, Systems Analysis, and Collection Advisory Teams in the Policy and Division Support Section (PDSS).

The incumbent has organizational responsibility for all ARMD activities associated system support initiatives (analysis, quality review, system effectiveness monitoring, and improvement), division transaction support work, policy and legislative analysis and implementation efforts.

The incumbent also oversees and facilitates division-wide coordination efforts for activities related to: ARMD communications (ARMD Communicates, CAT News Flashes, Early Warnings, and the External Communication Process), annual legislative reporting requirements, Enterprise Intake Process, and Division Watch Point coordination.

As the PDSS Section Manager, participates in cross-functional teams, projects, and enterprise initiatives that support divisional, departmental, and statewide objectives. Serves as the ARMD representative on the Major Incident Response Team (MIRT), Disaster Strike Team, Legislative Strike Team, Filing Season Action Team, action committees or subcommittees, and other governance-related workgroups.

These responsibilities are accomplished through a management team that includes subordinate supervisors, including Administrator I and Administrator II classifications.

As a member of the ARMD Leadership Team, the incumbent identifies issues and trends that impact the

Division and collaborates with peers throughout the Division on issues and decisions that may affect program operations.

Essential Functions

Percentage	Description
35%	Provides leadership and direction to management team and staff whose primary duties include system analysis (monitoring system effectiveness, identifying enhancements, and supporting operation improvements), division transaction support, and policy and legislative issues for all of division staff. Participates in developing, evaluating, and reviewing collection policy, operational changes, and legislative proposals (including cost estimates and implementation plans related to legislative initiatives). Manages and coordinates Enterprise Intake activities, including intake review, assignment, tracking, and follow-through of requests and initiatives. Actively participates in developing, implementing, and monitoring the section's workplan and budget process. Develops, monitors, and communicates updates on bureau/division Business Plan Projects ensuring alignment with strategic goals and operational initiatives.
35%	Serves as a key program and administrative resource for division-wide initiatives, providing coordination, analysis, monitoring, and implementation support for critical programs and projects. Responsibilities include: Serving as the ARM Division liaison and subject matter resource for the departmental Major Incident Response Team (MIRT) when a major IT issue occurs and systems become unavailable. Determines and communicates impacts to our operational processes. Coordinating and managing External Communications and ARM Communications (ARM Communicates, CAT News Flashes, Early Warnings, etc.) activities to ensure timely, accurate, and consistent dissemination of information. Serving as the Division Watch Point Coordinator ensuring timely communication, monitoring, tracking, reporting, and resolution of high-priority issues, risks, and emerging concerns. Provides direct support to the Assistant Bureau Director for special assignments including writing issue papers, creating presentations, conducting research, and preparing analysis. Assignments also include promoting and coordinating ARM leadership events and meetings and assisting with the development and coordination of the bureau and division business plans.
25%	As part of the ARM Section Manager Group, collaborates with peers and advises ARMD Bureau Directors on issues impacting the ARMD operations and the development and implementation of strategies to improve collection programs. Stays abreast of collection industry trends, emerging technologies, and issues that may affect division operations. Represents the Bureau/Division on special teams or projects having divisional, departmental and/or statewide impact on the ARM Division's collection programs. Participates in and coordinates activities associated with the Disaster Strike Team, ensuring proper communication, and readiness coordination for continuity of operations. Coordinates division activities related to the Filing Season Action Team, ensuring

	readiness and timely completion of action items Provides analytical, costing, implementation, and coordination support for the Legislation Strike Team, including legislative analysis, impact assessments, resource requirements, and implementation planning. Participates in large project teams and other related efforts to support the division and overall project objectives. Provides leadership and support to staff participating in these efforts and ensures alignment with division priorities, business plans, and strategic goals.

Marginal Functions

Percentage	Description
5%	On an as-needed basis, act as back-up for the Bureau Director, Assistant Bureau Director, or Budget Training and Operations Services Section Manager in meetings, on teams, and for other responsibilities.

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