



Duty Statement

Request for Personnel Action (RPA) Number	Effective Date
Classification Title Career Executive Assignment (CEA B)	Position Number 564-514-7500-001
Working Title Director, Legislative Services Bureau	Bureau and Section Legislative Services 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 Chief, Finance and Executive Services Division, the incumbent plans, organizes and directs FTB's legislative services program. The Legislative Services Bureau Director is specifically responsible for development of departmental policy impacting the legislative program. In addition, the Bureau Director is responsible for the identification and analysis of proposed legislation and development of the department's legislative proposals. This position serves as a primary liaison for FTB with the legislature and represents the department with legislative committees, the Administration and constituent groups.

Essential Functions

Percentage	Description
40%	Plans, organizes, and directs the activities of the Legislative Services Bureau. Works closely with the management team of Economic and Statistical Research Bureau to simplify joint or related processes including cross training to ensure efficient operations. Recommends the department's and administration's position on bills affecting FTB related tax policy. Works with the department to identify the need for initiating legislation and works with staff in Financial Management Bureau and Economic and Statistical Research Bureau to determine the fiscal and revenue impact associated with legislation.
25%	Responsible for providing timely and accurate bill analyses, including revenue estimates, to the Board, Administration, and the Legislature. Assures that bill analyses accurately reflect departmental administrative, policy, and budgetary concerns.
20%	Testifies before the Legislative Committees to present FTB's concerns, issues and policy positions. Serves as the departmental representative with the legislative staff, the Administration and constituent groups. Develops standard and special reports for the Department of Finance, the Legislative Analyst, Agency, and the Legislature as required.
10%	Builds relationships with newly elected officials, which involves educating, building trust and providing accurate information. Develops departmental legislative proposals and advocate for support of enactment. Represents the department with interested public and private stakeholders including public speaking engagements.

Marginal Functions

Percentage	Description
5%	Provides the highest level of personal income tax and bank and corporation tax policy advice to FTB's Executive Officer, Chief Counsel, Chief of the Financial and Executive Services Division and as applicable Board Members and their staff and Agency staff.

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