FRANCHISE TAX BOARD
CAREER EXECUTIVE ASSIGNMENT
EXAMINATION ANNOUNCEMENT

California State Government supports equal opportunity to all regardless of race, color, creed, national origin, ancestry, sex, marital status, disability, religious or political affiliation, age, sexual orientation, medical condition or pregnancy. It is an objective of the State of California to achieve a drug-free work place. Any applicant for state employment will be expected to behave in accordance with this objective because the use of illegal drugs is inconsistent with the law of the State, the rules governing Civil Service, and the special trust placed in public servants.

DEPARTMENT:	FRANCHISE TAX BOARD	**RELEASE DATE:**	Thursday, September 6, 2012
POSITION TITLE:	Taxpayers' Rights Advocate	**FINAL FILING DATE:**	Friday, October 5, 2012
CEA LEVEL:	CEA 2	**EXTENDED FINAL FILING DATE:**	
SALARY RANGE:	$ 7,815.00 - $ 8,616.00 / Month	**BULLETIN ID:**	09042012_2

POSITION DESCRIPTION

Under the general direction of the Executive Officer, the Advocate position was created by the Taxpayer Bill of Rights legislation. The Taxpayers' Rights Advocate will be the external face of the Franchise Tax Board for all taxpayer related issues. The incumbent will work to identify developing trends relating to departmental problems by working with taxpayer and tax practitioner groups; make recommendations for changes to departmental policies and practices to better enable taxpayers to meet their tax obligations and insure that those recommendations are implemented in the programs; identify departmental policies and practices that create a burden for taxpayers and provide recommendations to reduce the burden. The incumbent will be responsible for all activities related to the Taxpayers' Bill of Rights including the preparation of the annual report to the Legislature, the annual hearing before the three member Franchise Tax Board and all follow up activities. The incumbent is expected to establish and maintain a cooperative working relationship with all external organizations including the California Society of Certified Public Accountants, the California Society of Enrolled Agents, the IRS, and sister tax agencies in California and other states.

MINIMUM QUALIFICATIONS

Applicants must meet the following minimum qualifications:

Either I

Must be a State civil service employee with permanent civil service status or who previously had permanent status in the State civil service.

Or II

Must be a current or former employee of the Legislature, with two or more consecutive years as defined in Government code § 18990.

Or III

Must be a current or former non-elected exempt employee of the Executive Branch with two or more consecutive years (excluding those positions for which salaries are set by statute) as defined in Government Code § 18992.

Or IV
Must be a person retired from the United States military, honorably discharged from active military duty with a service-connected disability, or honorably discharged from active duty as defined in Government Code Section 18991.

KNOWLEDGE AND ABILITIES

Applicants must demonstrate the ability to perform high administrative and policy – influencing functions effectively. Such overall ability requires possession of most of the following more specific knowledge and abilities:

(1) Knowledge of the organization and functions of California State Government including the organization and practices of the Legislature and the Executive Branch; principles, practices, and trends of public administration, organization, and management; techniques of organizing and motivating groups; program development and evaluation; methods of administrative problem solving; principles and practices of policy formulation and development; and personnel management techniques; the department's or agency's Equal Employment Opportunity Program objectives; and a manager's role in the Equal Employment Opportunity Program.

(2) Ability to plan, organize, and direct the work of multidisciplinary professional and administrative staff; analyze administrative policies, organization, procedures and practices; integrate the activities of a diverse program to attain common goals; gain the confidence and support of top level administrators and advise them on a wide range of administrative matters; develop cooperative working relationships with representatives of all levels of government, the public, and the Legislature and Executive branches; analyze complex problems and recommend effective courses of action; and prepare and review reports; and effectively contribute to the department's or agency's Equal Employment Opportunity objectives.

These knowledge and abilities are expected to be obtained from the following kinds of experience with substantial participation in the formulation, operation and/or evaluation of program policies (experience may have been paid or volunteer; in State service, other government settings, or in a private organization):

CEA Level 1. Supervisory/administrative experience in a line or staff activity, including the execution and/or evaluation of program policies.

CEA Levels 2 and 3. Broad administrative or program manager experience with substantial participation in the formulation, operation, and/or evaluation of program policies.

CEA Levels 4 and 5. Extensive managerial and program administrative experience which has included substantial responsibility for a combination of management functions such as program planning; policy formulation; organization coordination and

control; and fiscal and personnel management. Where high technical professional qualifications are of primary importance in performing the duties of a given CEA position, then the above required experience may have been in a staff capacity exercising professional skills to influence and contribute to program, policy, and methods of providing those professional services. Primary examples are medical doctors and attorneys.

DESIRABLE QUALIFICATION(S)

In addition to evaluating each candidate's relative ability, as demonstrated by the quality and breadth of experience, the following job-related factors will provide the basis for competitively evaluating each candidate.

1. Knowledge of the management principles for effective recruitment, selection, development and retention of competent staff; includes making appropriate assignments and managing staff performance.

2. Skill to distill key points from complex information and pass it on to others, as appropriate, in a way that is easy to understand.

3. Skill to recognize, mediate and manage conflicts, confrontations and disagreements in a positive and constructive manner that promotes cooperation and improves productivity.

4. Skill to responsibly administer the programs(s) of the Department in a manner that reflects the mission and values of the organization and the fundamental principles of sound tax administration.

5. Skill to obtain the relevant facts and information needed in a crisis, convey a sense of confidence and commitment to a successful outcome and earn the trust of others.

6. Skill to present oneself in an appropriate and professional manner at all times to promote a positive image of the Department and the State of California.

7. Ability to consider problems and opportunities from a global perspective and their relevance and application to departmental operations (i.e., ability to see the “big picture”).

8. Ability to give subordinate staff latitude and encouragement to make decisions in their own sphere of work and establish policies and procedures consistent with the organization’s mission, values and business goals.

9. Ability to analyze data, make connections between cause and effect, or identify patterns or trends.

10. Ability to understand impacts and anticipate responses to decisions, including the relative importance of a task or issues and the need to compromise on a position.

11. Ability to recognize and value the importance of a customer-centric organization that values the role of all internal and external customers.

12. Ability to notice trends and consequences of situations and position your organization to take advantage of new opportunities or mitigate potential negative outcomes.

13. Ability to work cooperatively with others to share both the work and the credit for team projects and enterprise outcomes.

14. Results Oriented: Exhibits a strong sense of urgency about solving problems and accomplishing work.

EXAMINATION INFORMATION

A minimum rating of 70% must be attained to obtain list eligibility. Hiring interviews may be conducted with the most qualified candidates. All candidates will receive written notification of their examination results. The result of this examination will be used only to fill the position of **Taxpayers' Rights Advocate**, with the **FRANCHISE TAX BOARD**. Applications will be retained for twelve months.

The Results of this examination will be used only to fill this position and may be used to fill subsequent vacancies for this position for a period of up to twelve months.

The examination process will consist of an evaluation of the candidate's application and Statement of Qualifications. The minimum and desirable qualifications listed on this bulletin will be used to screen and evaluate the application and Statement of Qualifications using a predetermined evaluation criteria. Therefore, it is critical that each applicant include specific information on how his/her background, knowledge, abilities and personal characteristics meet the minimum qualifications and desirable qualifications.

The Statement of Qualifications may also serve as documentation of the candidate's ability to present information clearly and concisely in writing, since this is a critical factor to successful job performance. The Statement of Qualifications may be the only basis for the candidate's final score and rank on the eligible list. Candidates will be ranked competitively, and each candidate will be notified in writing of his/her examination results.

FILING INSTRUCTIONS

U.S. Military veterans must attach a legible copy of his/her veteran's discharge (DD214) or other official discharge documents, showing your enlistment and discharge dates, branch of service, and character of service (i.e., Type of Discharge).

All application materials must be received by the Examination Unit by the final filing date. Faxes will be accepted [(916) 845-0515], however; the originals must be received prior to the start of the examination.

Examination materials personally delivered, received via U.S. Postal Service, or any other delivery service after the final filing date will not be accepted and cannot be returned pursuant to California Code of Regulations 174.

Interested applicants must submit:

- A completed Standard State Application (Form 678).
- A "Statement of Qualifications". The Statement is a narrative discussion of how the candidate's education, training, experience, and skills meet the minimum and desirable qualifications and qualify them for the position. The Statement of Qualifications serves as a documentation of each candidate's ability to present information clearly and concisely in writing and should be typed and no more than two pages in length, single-spaced, using a 12 - point font.
- Resumes do not take the place of the Statement of Qualifications.

Applications must be submitted by the final filing date to:

FRANCHISE TAX BOARD, Examination Unit / Human Resources
P.O. Box 550, Sacramento, CA 95812
Wendy Duke | (916) 845-5979 | wendy.duke@ftb.ca.gov

ADDITIONAL INFORMATION
Questions regarding this examination should be directed to Wendy Duke at (916) 845-5979.

SPECIAL TESTING
If you have a disability and need special testing arrangements, mark the appropriate box in Part 2 of the "Examination Application." You will be contacted to make specific arrangements.

GENERAL INFORMATION
If you meet the requirements stated in this bulletin, you may take this examination, which is competitive. Possession of the entrance requirements does not assure a place on the eligible list. Your performance in the examination described on this bulletin will be compared with the performance of others who take this test, and all candidates who pass will be ranked according to their scores.

The FRANCHISE TAX BOARD reserves the right to revise the examination plan to better meet the needs of the service if the circumstances under which this examination was planned change. Such revision will be in accordance with civil service law and rules and all competitors will be notified.

General Qualifications: Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others.

Class specs: CEA and Exempt Appointees