



## FRANCHISE TAX BOARD CAREER EXECUTIVE ASSIGNMENT EXAMINATION ANNOUNCEMENT

The State of California is an equal opportunity employer to all, regardless of age, ancestry, color, disability (mental and physical), exercising the right to family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding and related medical conditions), and sexual orientation. 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.

<b>DEPARTMENT:</b>	FRANCHISE TAX BOARD	<b>RELEASE DATE:</b>	Friday, November 2, 2012
<b>POSITION TITLE:</b>	Director, Planning, Performance, and Project Oversight	<b>FINAL FILING DATE:</b>	Monday, December 3, 2012
<b>CEA LEVEL:</b>	CEA 2	<b>EXTENDED FINAL FILING DATE:</b>	
<b>SALARY RANGE:</b>	\$ 7,815.00 - \$ 8,616.00 / Month	<b>BULLETIN ID:</b>	10102012_1

### POSITION DESCRIPTION

Under the direction of the Division Chief, Financial and Executive Services Division (FESD), this position serves as the department's Strategic Planner and the Director of the Planning, Performance and Project Oversight Bureau. The incumbent facilitates the development of and focus on FTB's Strategic Plan and Enterprise Business Plan, working closely with the department's Governance Council (GC) on emerging and sensitive issues. Oversees the Enterprise Continuity Planning Program, the Enterprise Performance Management Program, the Stakeholder Value Research Program, and the Project Oversight and Guidance Section. The incumbent formulates and implements policies related to all of these areas, and ensures that all policies, standards, guidelines, procedures and practices are developed and carried out in a manner that complies with statewide policies and procedures. The incumbent is the principle liaison for IT projects and continuity planning issues with external agencies such as the State Consumer Services Agency (SCSA), California Technology Agency (CTA), Department of Finance (DOF), California Emergency Management Agency (CalEMA) and the Legislative Analysts' Office.

### 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 issues and perspectives relative to an area of expertise (e.g. changing technology, trends in human resources management, etc.) and their relevance and application to departmental operations.
2. Knowledge of strategic planning processes including assessing organizational strengths, weaknesses, opportunities and threats, obtaining input from staff, customers and stakeholders and developing action plans incorporating all relevant information.
3. 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”).
4. 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.
5. Ability to recognize underlying or potential issues and problems that are not readily apparent.
6. Ability to define specific tasks, milestones, deliverables, and timeframes and maintain a consistent focus on goals and resources.
7. Ability to recognize when change is required, be resourceful, and take initiative to involve the proper people in determining the feasibility of change and the best course of action.
8. Ability to develop professional networks with executives in other state organizations, to promote information sharing, collaboration, and communication on issues of mutual importance.
9. Ability to influence others toward a common goal, by building consensus and getting buy-in from others on plans and proposals, including enlisting third party support.
10. Skill to distill key points from complex information and pass it on to others, as appropriate, in a way that is easy to understand.
11. Skill to acquire the appropriate and necessary resources and manage those resources effectively to complete assigned workloads and achieve optimum outcomes.
12. Skill to approach a complex task by breaking it down into its component parts and considering each part in detail.
13. Skill to develop challenging but achievable goals and performance measures that advance the

organization's mission in a meaningful way.

14. Responsible: Willingness to be accountable for the outcome of work done by yourself and others under your direction or problems/issues arising out of your organization; willingness to take blame for mistakes and not seek to blame others.

## **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 **Director, Planning, Performance, and Project Oversight**, 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 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 postmarked or received by the Examination Unit by the 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.
- Cover letters do not take the place of the Statement of Qualifications.
- Statement of Qualifications should specifically address each of the Desirable Qualifications.
- Applicants who fail to submit the Statement of Qualifications will be eliminated from this examination process.

**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](#)