Per California Code of Regulations, title 2, section 548.5, the following information will be posted to CalHR's Career Executive Assignment Action Proposals website for 30 calendar days when departments propose new CEA concepts or major revisions to existing CEA concepts. Presence of the department-submitted CEA Action Proposal information on CalHR’s website does not indicate CalHR support for the proposal.

### A. GENERAL INFORMATION

<table>
<thead>
<tr>
<th>1. Date</th>
<th>2. Department</th>
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<tbody>
<tr>
<td>01/10/2022</td>
<td>Franchise Tax Board</td>
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</table>

3. Organizational Placement (Division/Branch/Office Name)

- Administrative Services Division

4. CEA Position Title

- Organizational Development and Talent Management Director

5. Summary of proposed position description and how it relates to the program's mission or purpose. (2-3 sentences)

The Organizational Development and Talent Management Bureau Director (BD) will develop, implement and enforce policy around organizational development (to include organization change management) and talent management to ensure the people side of change achieves business outcomes associated with the changes. This position will provide leadership to support Franchise Tax Board's (FTB) Strong Organization Goal where we value, invest in, challenge and empower our employees to have an enterprise view, be experts in their field and achieve their full potential. The Organizational Development and Talent Management BD leads teams of high-level representatives from across all areas of the department to gather input for and develop/implement initiatives that further the sustain the department’s mission and vision.

6. Reports to: *(Class Title/Level)*

- CEA C

7. Relationship with Department Director *(Select one)*

- [x] Member of department's Executive Management Team, and has frequent contact with director on a wide range of department-wide issues.

- [ ] Not a member of department's Executive Management Team but has frequent contact with the Executive Management Team on policy issues.

    *(Explain):*  

8. Organizational Level *(Select one)*

- [ ] 1st   
- [ ] 2nd   
- [x] 3rd   
- [ ] 4th   
- [ ] 5th (mega departments only - 17,001+ allocated positions)
9. What are the duties and responsibilities of the CEA position? Be specific and provide examples.

The Organizational Development and Talent Management Bureau Director through subordinate managers, plans, directs and organizes the activities of the Talent Development and Organization Change Management Bureau. Talent management is a collaborative, enterprise-wide effort focused on our most valuable resource: FTB Employees. Talent management champions programs and processes that recruit, develop and retain the right employees to meet the FTB’s business and strategic objectives. TM services include: Recruiting, Hiring, On-boarding, Core Competency, Job Specific Competency, Leadership Competency, Workforce Planning, Workplace Engagement, and Guidance. Talent management is the integrated process of ensuring that an organization has a continuous supply of highly productive individuals in the right job, at the right time. Talent management can increase overall workforce productivity through the improved attraction, retention, and utilization of talent. The talent management strategy is superior not just because it focuses on productivity, but also because it is forward looking and proactive, which means that the organization is continuously seeking out talent and opportunities to better utilize that talent.

The Organizational Development and Talent Management BD manages staff engaged in the delivery of the training, talent development and organizational change management functions by developing, creating and setting policy and overseeing processes that, in conjunction with the mission and values of Franchise Tax Board, create and support efficient and accurate resources/processes for the employees of Franchise Tax Board. The Organizational Development and Talent Management BD recommends and implements strategies for improving efficiencies to the delivery of services. Actively collaborates with all levels of management regarding the needs of the internal and external customers. Communicates and collaborates with business and technology partners and managers to develop and implement new and improved methods of providing services and meeting expectations of those needs. Mentor management on talent development.

The Organizational Development and Talent Management BD provides policy guidance and oversight to the Workforce Planning program that is tasked with the development and implementation of the Talent Management Strategy services for FTB’s management and staff. Open lines of communication between Business and Human Resources Bureau (BHRB) and the enterprise to develop partnerships that move the department in the direction of a strong organization.

This position will be directly responsible for developing policies and coordinating activities to ensure that FTB can continue to fulfill our mission despite any changes that may happen in the environment that affect our ability to recruit new talent; maintain existing talent or support organizational changes in existing talent. Examples of past and current environmental challenges are changes in the make up of the workforce (for example: economic changes; pandemic changes; technological changes to the way we do work and changing duties of staff.

Most recently, the pandemic has resulted in over 70% of staff teleworking at some level. While this change was thrust upon us and we have been mostly successful in minimizing impacts to taxpayers; there have been major shifts in how people communicate and how work flows. In order to continue to be successful and achieve our mission in the future, we must have a program dedicated to supporting and leading the effort to ensure that we continue to develop staff and manage organizational change to ensure that we achieve the maximum results and fulfill our fiduciary responsibilities to taxpayers.

This position will also participate as a key member of the Executive Management Team and serve on critical enterprise teams such as Strategic Planning, the Joint Action Committee, the Diversity Equity and Inclusion team, and will co-chair the Organizational Development Action Committee.
10. How critical is the program's mission or purpose to the department's mission as a whole? Include a description of the degree to which the program is critical to the department's mission.

- [x] Program is directly related to department's primary mission and is critical to achieving the department's goals.
- [ ] Program is indirectly related to department's primary mission.
- [ ] Program plays a supporting role in achieving department's mission (i.e., budget, personnel, other admin functions).

Description: The mission of the Franchise Tax Board is to help taxpayers file timely and accurate tax returns, and pay the correct amount to fund services important to Californians. To accomplish this mission, the Organizational Development and Talent Management BD is responsible for ensuring the FTB's goals are met: 1) Exceptional Service - Strive to continuously enhance our customers’ experience; 2) Effective Compliance - Fairly administer the law to ensure taxpayers file and pay the correct amount; 3) S 4) Operational Excellence - Optimize our processes, products, services, and resources to better serve our internal and external customers.

While Goal 3, Strong Organization is most closely related to this position; none of them can be fulfilled without a well-developed talent, who are able to adapt to changes, whether the change is planned (adapting to new technology or legislation) or unplanned (pandemic response).

FTB provides over 75% of the general fund dollars that fund services important to Californians and we cannot rise to that challenge without dedicated focus or talent and change management.
11. Describe what has changed that makes this request necessary. Explain how the change justifies the current request. Be specific and provide examples.

Our staff have always been our most valuable resource; without them we cannot fulfill our mission or goals. Changes in our environment such as the make up of the workforce (for example: economic changes; pandemic changes; technological changes to the way we do work and changing duties of staff affect our ability to recruit new talent; maintain existing talent or support organizational changes in existing talent. Most recently, the pandemic has resulted in over 70% of staff teleworking at some level. Previous levels were in the neighborhood of 20% at the high end. While this change was thrust upon us and we have been mostly successful in minimizing impacts to taxpayers; there have been major shifts in how people communicate and how work flows. We have to address these environmental challenges In order to continue to be successful and achieve our mission in the future, and we must have a program dedicated to supporting and leading the effort to ensure that we continue to develop staff and manage organizational change to ensure that we achieve the maximum results and fulfill our fiduciary responsibilities to taxpayers.

Some of the Talent Development functions are currently performed in a section within the Business and Human Resources Bureau. This section has grown and will continue to grow as the FTB is challenged with implementing new legislation and projects such as Enterprise Data to Revenue (EDR2) and eventually (EDR3). The organizational development component has previously been marginally supported with matrix organizations where we establish departmental teams who tackle an issue. The pandemic has exacerbated the need for dedicated staff who develop the needed policy and procedures to ensure the organization develops efficiently and effectively so we can fulfill our mission.
C. ROLE IN POLICY INFLUENCE

12. Provide 3-5 specific examples of policy areas over which the CEA position will be the principle policy maker. Each example should cite a policy that would have an identifiable impact. Include a description of the statewide impact of the assigned program.

The Organizational Development and Talent Management BD serves as an expert level advisor to the Administrative Services Division Chief, Executive Officer, and executive management on policy issues relating to Organizational Change and Talent Management. The Organizational Development and Talent Management BD develops, implements and sets the policies and procedures for all learning and development goals from staff to leadership. Well trained and developed staff lead at their level and then use that experience as they progress into leadership positions. Strong leaders help us achieve our goals and fulfill our mission. The Organizational Development and Talent Management BD will support supervisors and managers in developing staff and maintaining employee engagement, as well as provide guidance to the FTB’s leadership training programs that go beyond state of CA requirements to ensure that leaders at all levels model our leadership strategies and values.

The Organizational Development and Talent Management BD works with the Business and Human Resources Bureau Director to develop, implement and set the policy and procedures for developing performance metrics so that all employees are held to standards that are understood, attainable, and equally enforced across the organization.

The Organizational Development and Talent Management BD develops, implements and sets the policies for workforce planning to ensure that the organization is well placed to face knowledge, talent or other workforce gaps.

The Organizational Development and Talent Management BD develops, implements and sets the policies for the people side of organizational change management. According to California Department of Technology’s Organizational Change Management (OCM) Framework, we need to manage the people-side of change in order to achieve business outcomes associated with that change. OCM facilitates the transition of individuals, teams, and organizations to a future state to achieve business benefits. To accomplish this, OCM takes into consideration the complete organization and how the organization and people need to change. OCM provides a set of activities that:

• Address the people issues that arise when an organization tries to make changes
• Facilitate communication to increase awareness and ownership
• Identify and promote leadership support
• Mobilize commitment of Stakeholders to implement a change initiative
• Pro-actively identify and address resistance to change
• Create a thoughtful training approach to provide opportunities for end users to gain knowledge and skills in order to succeed in the future state.
## C. ROLE IN POLICY INFLUENCE (continued)

13. What is the CEA position's scope and nature of decision-making authority?

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<tr>
<td>The Organizational Development and Talent Management BD will have the decision making authority to develop and implement strategies and policies to oversee and coordinate multiple programs in charge of talent and leadership development, organizational development, delivery of enterprise training, and the people side of organizational change management functions. The Organizational Development and Talent Management BD will ensure each of these programs support the FTB's goals. The Organizational Development and Talent Management BD will ensure that key programs are in place to attract and retain top talent to FTB, and that employee engagement strategies are in place to ensure high employee productivity.</td>
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The Organizational Development and Talent Management BD will also be responsible to provide the Governance Council with strategies and recommendations on current and future initiatives as they relate to performance management, leadership development, organizational change and engagement.

The Organizational Development and Talent Management BD will work closely with subordinate managers to track progress and provide updates on any changes in strategy, policy or program priorities. Additionally, the Organizational Development and Talent Management BD will report to senior and executive management on the progress of individual projects and overall program. As a member of various action committees, the Organizational Development and Talent Management BD is expected to make valuable contributions to enterprise level decision-making.

14. Will the CEA position be developing and implementing new policy, or interpreting and implementing existing policy? How?

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<td>This position will both develop and implement new FTB policy in the areas of organizational development, talent management and organizational change and interpret of implement existing state guidance provided by CalHR, CDT and other governing bodies.</td>
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