



STATE OF CALIFORNIA  
Franchise Tax Board

STATE OF CALIFORNIA

## Senior Operations Specialist

DEPARTMENTAL PROMOTIONAL EXAMINATION

Location: Sacramento

**Final Filing Date: August 30, 2022**

### MISSION STATEMENT

**Mission of the Franchise Tax Board:** Our mission is to help taxpayers file timely and accurate tax returns, and pay the correct amount to fund services important to Californians.

### EEO

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.

### DRUG FREE STATEMENT

It is an objective of the state of California to achieve a drug-free state 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.

### WHO SHOULD APPLY?

**The Senior Operations Specialist examination is now offered multiple times a year. If you have taken the most recent examination, you do not need to apply, as your current list eligibility remains valid for 12 months. You must wait 9 months from the eligible list date to retake the examination.**

Applicants who meet the minimum qualifications as stated below may apply for this examination. All applicants must meet the education and/or experience requirements as stated on this examination announcement.

This is a promotional examination for Franchise Tax Board (FTB). In order to take this examination:

1. Applicant must have a permanent civil service appointment without a break in service, with the Franchise Tax Board, by the final filing date; **or**
2. Applicant must be a current or former employee of the Legislature for two or more years as defined in Government Code Section 18990; **or**
3. Applicant must be a current or former non-elected exempt employee of the Executive Branch for two or more consecutive years as defined in Government Code Section 18992; **or**
4. Applicant must be a person retired from the United States Military, honorable discharged from active duty with a service-connected disability; or honorably discharged from active duty as defined in Government Code Section

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18991. **Veterans must provide a copy of their DD214 for entrance requirements.** Please attach your DD214 to your application. **Veterans' preference will not be granted in promotional examinations.**

For applicants under items 2, 3, or 4, if promotional examinations are given by more than one department for the same classification, the applicant must select one department in which to compete. Refer to the General Information, Promotional Examinations Only section of this bulletin for other eligibility requirements. Under certain circumstances, former FTB employees may be allowed to compete under the provisions of Rule 235.

## FILING INSTRUCTIONS

**FINAL FILING DATE TO SUBMIT AN APPLICATION: August 30, 2022**

Applications (STD. 678) are available at CalHR's website <https://jobs.ca.gov/pdf/std678.pdf>

**Unfortunately Electronic/Email applications are not an option when applying for exams.**

Applications can only be filed either in person or by mail:

**In Person:**

Franchise Tax Board  
9646 Butterfield Way  
Sacramento Bldg., Exam Unit  
Sacramento, CA 95827  
Drop off at Welcome Center in Main Lobby  
(may be non-operational on weekends and holidays)

**By Mail:**

Franchise Tax Board  
ATTN: Exam Unit  
P.O. Box 550  
Sacramento, CA 95812-0550

**APPLICATIONS MUST CONTAIN ORIGINAL SIGNATURES AND MUST BE SUBMITTED TO THE ADDRESS INDICATED ABOVE.**

If signatures are missing on your application and not re-submitted by the close date of the exam, scores will not be recorded and candidates will have to wait 9 months before being eligible to re-take the exam. It is also the candidate's responsibility to follow up with the examination unit to make sure sign applications were received.

Applications (STD.678) must be **POSTMARKED** no later than the final filing date. Applications postmarked, personally delivered, or received via interoffice mail after the final filing date will not be accepted. **Unfortunately Electronic/Email applications are not an option when applying for exams.**

**\*Due to the COVID-19 pandemic and for those with accommodated work schedules, the Examination Unit has extended the final file date for the Senior Operations Specialist Exam from the traditional 2 week filing period to 3 weeks. Since the postal service and other shipping affiliates may experience delays in delivery services, candidates are encouraged to obtain and retain proof that their applications were mailed timely. The Examination Unit will not accept late applications if candidates are unable to provide valid proof that their applications were mailed timely.**

Dates printed on Mobile Bar Codes, such as the Quick Response (QR) Codes available at the USPS, are not considered Postmark dates for the purpose of determining timely filing of an application.

**NOTE: The Qualification Assessment (QA) exam link will be sent to your FTB email address from Survey Monkey. All examination notifications, with the exception of the QA email link, will be sent by mail. Any requests for alternative email addresses must be requested by contacting the Examination Unit at (916) 845-3608 or email [ExamStaff@ftb.ca.gov](mailto:ExamStaff@ftb.ca.gov).**

## SELECTION PLAN

It is anticipated that candidates who meet the minimum qualifications for this examination will be sent an email the **week of October 3, 2022**, which will contain the instructions and the link to complete the online Qualifications Assessment (QA) examination. **It is the candidate's responsibility to read the letter that is enclosed with their acceptance notice which provides specific instructions/dates about the QA link.** It is also the candidate's responsibility to contact Franchise Tax Board's Examination Unit at (916) 845-3608 or email [ExamStaff@ftb.ca.gov](mailto:ExamStaff@ftb.ca.gov) if they have not received the QA link by the date indicated on the letter.

## SPECIAL TESTING ARRANGEMENTS

If you have a disability and need special assistance or special testing arrangements, contact Franchise Tax Board (FTB), Examination Unit at (916)845-3608, or via the California Relay Service for the Deaf or Hard of Hearing at (800)735-2929 from TTY phones and (800) 735-2922 from voice phones.

Additionally, please select the "Reasonable Accommodations" box when filling out the application.

## SALARY

**\$6,658.00 - \$8,334.00**

## ELIGIBLE LIST INFORMATION

A departmental, promotional merged list will be established for the Franchise Tax Board. The names of successful competitors will be merged onto the eligible list in order of final scores regardless of test date. List eligibility will expire 12 months after it is established. Competitors must retake the examination to reestablish eligibility.

**Once you have taken this examination, you may not retake it for 9 months.**

## REQUIREMENTS FOR ADMITTANCE TO THE EXAMINATION

**NOTE:** All applicants must meet the education and/or experience requirements as stated on this examination bulletin by the final filing date. Your signature on your application indicates that you have read, understood, and possess the qualifications required.

Applications/resumes **MUST** contain the following information: "to" and "from" dates (month/day/year), time base, civil service class title(s), and range, if applicable. College course information **MUST** include: title, semester or quarter credits, name of institution, completion dates, and degree (if applicable).

**Applications/resumes received without this information may be rejected.**

**NOTE:** It is especially important that each applicant take special care to accurately and completely fill out their application. List all experience relevant to the "Minimum Qualifications" shown on this announcement.

## MINIMUM QUALIFICATIONS

### EITHER I

One year of experience performing the duties equivalent to those of a Staff Operations Specialist, Franchise Tax Board.

### OR II

Five years of professional technical/analytical experience performing duties in one or a combination of the following areas: program planning, development and evaluation, policy review and evaluation, budget analysis, tax legislation analysis, technology research, or work flow, work force and industrial engineering. (Experience in California state service applied toward this pattern must include one year at a level equivalent to Staff Operations Specialist, Franchise Tax Board.) (Education equivalent to graduation from college with major work in the field of business administration, industrial engineering, management information systems/computer science or public policy may be substituted for one year of the required experience.) (Education equivalent to a master's degree in one of the fields listed above may be substituted for two years of the required experience.)

### PROOF OF EDUCATION

Applicants using education to meet the minimum requirements must provide a copy of their diploma, official/unofficial transcript, statement and/or evaluation from an accredited U.S. college or university with their examination application. If an applicant is not able to provide proof of education from a recognized institution at the time of hire, their name may be removed from the eligible list(s).

### FOREIGN DEGREES

Applicants with foreign transcripts must provide an official/unofficial foreign transcript evaluation that indicates the number of units to which his/her foreign course work is equivalent. FTB accepts foreign transcript evaluations that are completed by one of the agencies approved by the California Commission on Teachers Credentialing. Agencies accredited by the Commission for Foreign Transcription Evaluation may be found on the Commission's website: [www.ctc.ca.gov](http://www.ctc.ca.gov).

**NOTE: All documents submitted become the property of the FTB. Do not submit original diplomas with the examination application.**

## POSITION DESCRIPTION

The positions are identified by top Franchise Tax Board management as requiring the service of the most highly skilled specialists who are seen as prime resource persons and innovators for the Board. Incumbents perform the most complex, critical and specialized functions having department-wide or statewide impact involving operational and tax policy development issues; serve as a project leader on department-wide projects; and participate on statewide projects. Responsibilities include: evaluation and project implementation of new operational processes which have departmental impact such as the automated system redesigns; analyze, evaluate and reengineer the operational work flow to improve the effectiveness and efficiency of divisional and/or departmental operations which includes the utilization of electronic information processes and teleprocessing systems; research methods for improving production management; develop strategies for work simplification, production planning and control, and work environments; evaluate the operational processes and new technology applications used by other State and Federal agencies; and represent the Board as a team leader/member on joint Federal and State task forces to implement new production processing methods; serve on Legislature and administration appointed task forces and committees.

**Positions exist in Sacramento.**

## EXAMINATION INFORMATION

This examination will consist of a Qualifications Assessment weighted 100%. Candidates must attain an overall minimum score of 70% in order to be placed on the eligible list.

**CANDIDATES WHO DO NOT COMPLETE OR SUBMIT THE QUALIFICATIONS ASSESSMENT BY THE DUE DATE WILL BE DISQUALIFIED.**

**NOTE:** If conditions warrant, this examination may utilize an evaluation of each candidate's experience and education compared to a standard developed from the class specification. For this reason, it is especially important that candidates take special care in accurately and completely filling out their application. List all experience relevant to the "Requirements for Admittance to the Examination" shown on this announcement.

## SCOPE OF EXAMINATION

Candidates should be prepared to answer pre-determined, job-related questions identified under the Knowledge, Skills, Abilities, and Personal Characteristics.

## KNOWLEDGE, SKILLS, ABILITIES, AND PERSONAL CHARACTERISTICS

### Knowledge of:

1. Principles, practices and trends of organization and management methods and program development.
2. Principles and practices of budgetary methods and State budgetary process.
3. Principles and practices of State administrative and legislative processes.
4. Principles and practices of industrial engineering and operational management methods.
5. Information technology methods and processing systems.
6. Programs, policies and tax laws governing the Franchise Tax Board.
7. Processing functions of the Board and their interrelationships.
8. Research and data gathering techniques to compile information for projects and assignments.
9. Purpose of the FTB, including its statutory mandates, products, services, customers, and measures of mission effectiveness.
10. The organizational structure and the interrelationships between operating units in the FTB.
11. The state and federal laws pertaining to taxpayer confidentiality and data security.
12. Decision-making techniques and processes to identify and make appropriate decisions from a variety of alternatives.
13. Problem-solving techniques and processes to identify and resolve problems and issues related to work assignments.
14. Financial and cost/benefit analysis principles and concepts to assess the fiscal impact and effectiveness of programs and projects.
15. Time management techniques to provide for efficient prioritization and completion of projects and assignments.
16. Strategic planning principles and concepts to plan and manage projects and assignments.
17. Critical thinking techniques including logic and common sense.
18. FTB's policies regarding conflict of interest, sexual harassment, workplace violence, and other ethical guidelines on personal conduct to avoid inappropriate conduct and behave in a professional manner.
19. The external political and business climate, technological changes, and other pertinent issues in the state and the country that may have an impact on the enterprise.

20. The California legislative and budgetary processes.
21. Change management principles and processes.

**Skill to:**

1. Establish and maintain respectful, cooperative relationships with others and to interact with individuals of diverse cultural or demographic backgrounds.
2. Interact effectively with and relate to individuals at all levels of the organization, and members of the public, regardless of their level of education or experience.
3. Listen to others to facilitate an open exchange of ideas and provide for effective two-way communication.
4. Build consensus and negotiate compromises when resolving matters involving differing opinions and viewpoints.
5. Convince and persuade others to agree with one's position on an issue.
6. Provide input and advice to others on appropriate courses of action for a given situation.
7. Negotiate realistic deadlines and timelines for the delivery of products or services.
8. Participate in and contribute to the effectiveness of a group or team.
9. Serve as the leader of a team and to adapt your leadership style and actions to effectively direct the work of the team to achieve its goals.
10. Verbally explain and clarify policies, procedures, issues, and instructions for audiences with varying levels of understanding.
11. Verbally summarize a variety of facts, statistics, and/or data clearly and concisely in an impromptu manner.
12. Write memos, letters, reports, and other documents using proper content, format, grammar, punctuation, and sentence structure.
13. Prepare concise written summaries or notes of information received from either written or oral sources.
14. Read and edit documents for proper content, format, grammar, punctuation, and sentence structure.
15. Prepare clear and concise written instructions to audiences with varying levels of understanding.
16. Distill and explain, verbally and in writing, technical or complex material (e.g., tax regulations, policies and procedures) to individuals with varying levels of understanding.
17. Present research findings and results at the appropriate level of complexity for the intended audience.
18. Organize and summarize the most pertinent information obtained from research and data gathering.
19. Break down or condense a large body of data into its most meaningful elements or extract specific relevant elements from the aggregate data.
20. Assimilate information and data from multiple sources into a concise whole for effective analysis.
21. Formulate hypotheses based upon available data or information.
22. Check and verify the accuracy and completeness of data and information obtained, including forms and documents.
23. Comprehend and interpret complex information and materials, including regulations, standards, procedures, and policies.
24. Apply technical principles and standards or policies and procedures in the completion of work assignments.
25. Identify exceptions to established standards, procedures, and/or policies.
26. Read and interpret charts, graphs, and tables.
27. Perform mathematical computations (e.g., ratios, decimals, percentages).
28. Solve algebraic equations and perform basic statistical calculations.
29. Apply the results of statistical analyses to problems to determine trends, explain relationships, and develop solutions.
30. Present numerical data in a clear and logical format (e.g., tables, charts, graphs).
31. Analyze and evaluate situations and data accurately and thoroughly to determine and implement effective and appropriate courses of action.

32. Identify pertinent facts and implications related to a situation before drawing conclusions and determining a course of action.
33. Recognize the pros, cons, and possible impact of decisions and actions to determine the most appropriate course of action.
34. Analyze and evaluate relevant issues affecting work unit operations for review with management.
35. Develop detailed and specific procedures and processes related to a complex program.
36. Identify the symptoms of a problem and distinguish them from the root cause.
37. Define the project scope, clarify expectations, establish project schedules, and develop milestones to complete projects and assignments within desired timeframes, scope, and resources.
38. Prioritize assignments and shift priorities and resources to meet required timeframes.
39. Organize and identify the activities to be completed by a team and develop realistic timelines for project deliverables.
40. Identify information, materials, and resources needed to complete a project or assignment.
41. Use computer word processing software (e.g., Microsoft Word) to develop and format written documents and create tables and charts.
42. Use computer spreadsheet software (e.g., Microsoft Excel) to perform mathematical calculations when summarizing data and to organize and present tables, graphs, and charts.
43. Use presentation software (e.g., Microsoft PowerPoint) to design and develop visual presentations and handouts.
44. Resolve basic problems concerning the use and operation of software programs (e.g. Microsoft Office software products).
45. Use the Internet and Intranet to conduct online research and obtain information related to projects or assignments.
46. Design and develop the content of oral presentations for a variety of audiences.
47. Deliver formal oral presentations for a variety of audiences.
48. Provide training (e.g., classroom, on-the-job, online) to facilitate the transfer of specific knowledge and/or skills.
49. Identify, assess, and manage risk(s) that may impact a project, while striving to maintain work schedules and project objectives.

**Ability to:**

1. Communicate effectively.
2. Reason logically and creatively and utilize a variety of analytical techniques to evaluate situations, resolve problems, and develop solutions.
3. Recognize and evaluate emerging trends and apply creative thinking in identifying uses of automation and technology within the Board.
4. Apply the principles and practices of industrial engineering and production management for redefining work-flow processes.
5. Consult, advise, and represent the Board on a wide variety of subject-matter areas.
6. Interpret tax legislation and recognize and evaluate emerging tax and public policy issues.
7. Establish and maintain effective working relationships with others.
8. Use discretion and tact when responding verbally or in writing to the needs, problems, or concerns of others.
9. Be flexible in adapting to changes in priorities, assignments, and other interruptions that may impact pre-established timelines and planned actions.
10. Understand and respond to your customers' needs and expectations.
11. Promote positive working relationships, maintain a positive attitude, and accept constructive feedback in a professional manner.
12. Work cooperatively with others to share both the work and the credit for team efforts and outcomes.
13. Follow-up and ensure assignments and activities of team members are completed timely.
14. Work and make appropriate decisions under time constraints, with limited information, while managing multiple

assignments.

15. Work independently on projects or assignments without close supervision or detailed instructions.
16. Combine ideas or information to creatively resolve issues, advance new solutions, and improve operational efficiency.
17. Demonstrate commitment, be persistent in the face of obstacles, take initiative to resolve issues, and persevere under challenging circumstances.
18. Identify when available information, resources, or capabilities are insufficient to complete assignments and develop potential solutions or seek assistance.
19. Accept other points of view and decisions and be open to different perspectives to resolve issues and enhance credibility.
20. Practice the mission, values, and foundational principles of FTB's strategic plan.
21. Coach and mentor others.

**Willingness to:**

1. Demonstrated ability to act independently.
2. Initiative.
3. Flexibility.
4. Tact.

## BENEFITS

To learn more about the comprehensive benefit package please visit the CalPERS website at <http://www.calpers.ca.gov>.

## VETERANS' PREFERENCE

Veterans' Preference will not be granted in the examination, as it does not meet the requirements to qualify for Veterans' Preference.

## CAREER CREDITS

Career Credits will not be added to the final score of this examination.

## CONTACT INFORMATION

For additional information regarding this examination, please contact the Franchise Tax Board Examination Unit at (916) 845-3608 or [ExamStaff@ftb.ca.gov](mailto:ExamStaff@ftb.ca.gov).

## DISCLAIMER

Please click on the link below to review the official California State Personnel Board class specification:  
<http://www.calhr.ca.gov/state-hr-professionals/pages/5334.aspx>

## GENERAL INFORMATION

**The Franchise Tax Board (FTB)** reserves the right to revise the examination plan to better the needs of the service if the circumstances change under which this examination was planned. Such revision will be in accordance with civil service laws and rules and all candidates will be notified.



**It is the candidate's responsibility for an examination without a written feature** to contact the Franchise Tax Board three weeks after the final filing date if he/she has not received any notification.

**It is the candidate's responsibility for an examination with a written feature** to contact the Franchise Tax Board six weeks after the final filing date if he/she has not received any notification.

**If a candidate's notice was not received** due to a verified postal error, he/she will be rescheduled upon written request. It is the candidate's responsibility to contact the Franchise Tax Board at (916) 845-3608.

**Examination Locations:** When a written test is part of the examination, it will be given in such places in California as the number of candidates and conditions warrant. However, locations of interviews or performance evaluations may be limited or extended as conditions warrant.

**Examination Applications are available** at [www.jobs.ca.gov](http://www.jobs.ca.gov), CalHR State Jobs Center, State Personnel Board offices, local offices of the Employment Development Department and the testing department on this job bulletin.

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

**Candidates needing special testing arrangements** due to a disability must mark the appropriate box on the application and/or contact the testing department.

**General Qualifications:** Candidates must possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties of the class. A medical examination may be required. In open examinations, investigation may be made of employment records and personal history and fingerprinting may be required.

**Eligible Lists:** Eligible lists established by competitive examination, regardless of date, must be used in the following order: 1) sub-divisional promotional, 2) departmental promotional, 3) multi-departmental promotional, 4) service-wide promotional, 5) departmental open, 6) open. When there are two lists of the same kind, the older must be used first. Eligible lists will expire in one to four years unless otherwise stated on the bulletin.

**Promotional Examinations Only:** Competition is limited to employees who have a permanent civil service appointment and military veterans that meet all the minimum qualifications. Under certain circumstances, other employees may be allowed to compete under provisions of Rules 234, 235, and 235.2. State Personnel Board Rules 233, 234, 235, 235.2, and 237 contain provisions regarding civil service status and eligibility for promotional examinations. These rules may be reviewed at <http://www.spb.ca.gov/>.

**If High School Equivalence is Required:** Equivalence to completion of the 12th grade may be demonstrated in any one of the following ways: 1) passing the General Educational Development (GED) Test; 2) completion of 12 semester units of college work; 3) certification from the State Department of Education, a local school board, or high school authorities that the candidate is considered to have education equivalent to graduation from high school; 4) for clerical and accounting classes, substitution of business college work in place of high school on a year-for-year basis. NOTE: For peace officer classifications please refer to the testing department for special requirements.

**Veterans' Preference:** California Law (Government Code 18971-18979) allows the granting of Veterans' Preference in Open entrance and Open, Non-Promotional entrance examinations. Veterans' Preference will be granted to all competitors who are successful in these types of examinations, and who qualify for and have requested the Veterans' preference by mail. In Open entrance examinations, Veterans' Preference is granted to competitors who achieve a passing score, shall be

placed in the top rank of the resulting eligibility list. Any veteran who has been dishonorably discharged or released is not eligible for Veterans' Preference.

Employees who have achieved permanent State civil service status are not eligible to receive Veterans' Preference. Permanent State civil service status means the status of an employee who is lawfully retained in his/her position after completion of the applicable probationary period. This includes permanent intermittent, part-time, and full-time appointments. In addition, individuals who at any time achieved permanent State civil service status and subsequently resigned or were dismissed from State civil service are not eligible to receive Veterans' Preference. Veteran status is verified by CalHR.

**How to Apply for Veterans' Preference:** Directions to apply for Veterans' Preference Points are on the Veterans' Preference Application ([CalHR 1093](#)) which is available at [www.jobs.ca.gov](http://www.jobs.ca.gov) or from CalHR, 1810 16th Street Sacramento, CA 95811 and the Department of Veterans Affairs. For additional information, go to Department of Veterans' Affairs website at [www.cdva.ca.gov](http://www.cdva.ca.gov).

**Felony Disqualification:** You are disqualified from being employed as a peace officer if: (1) You have been convicted of a felony in California or any other state; (2) you have been convicted of any offense in any other state which would have been a felony if committed in California; (3) you have been charged with a felony and adjudged by a superior court to be mentally incompetent; (4) you have been adjudged addicted or in danger of becoming addicted to narcotics, convicted, and committed to a State institution. If you have been convicted of a felony, you may be allowed to participate in this examination if your conviction(s): (1) has/have been sealed under Penal Code Section 851.7, 851.8, 1203.45, or Health and Safety Code Section 11361.5; (2) has/have been expunged or is/are expugnable pursuant to Health and Safety Code Section 11361.5 regarding marijuana offenses; (3) was/were stipulated or designated to be a lesser included offense of marijuana possession under Health and Safety Code Section 11557 or 11366.

**TDD** is Telecommunications Device for the Deaf and is reachable only from phones equipped with a TDD Device. California Relay Service (Telephone) for the deaf or hearing impaired. From TDD phones: 1-800- 735-2929 or from voice phone: 1-800-735-2922.

## Franchise Tax Board, Examination Unit

P.O. Box 550, Sacramento, CA 95812-0550

Phone: (916) 845-3608

Website: [www.ftb.ca.gov](http://www.ftb.ca.gov)