

STATE OF OHIO (DAS)CLASSIFICATION
SPECIFICATION**CLASSIFICATION SERIES:**

Tax Analysis Professional

SERIES NO.:

6684

MAJOR AGENCIES:

Taxation only

EFFECTIVE DATE:

04/26/2009

SERIES PURPOSE:

The purpose of the tax analysis professional occupation is to manage the fiscal analysis of legislative tax policy proposals in order to formulate & implement tax policy.

At the first & second levels, incumbents complete fiscal analysis of tax policy proposals & undertake directed studies of tax policy issues. At the third level, incumbents complete fiscal analyses of tax policy proposals, undertake self-directed study of tax policy issues & serve as coordinator of tax analysts or project teams. At the supervisory level, incumbent supervises tax analysis professionals & reviews & directs analysis process. At all levels, incumbents formulate tax policy for implementation, with the complexity of tax issues increasing throughout the series.

GLOSSARY: The following terms are to be interpreted as noted whenever they appear in this document.

Basic Tax Policy - proposed issue directly affects a single tax requiring simple analysis (e.g., motor vehicle fuel tax raised by \$.02, or cigarette tax raised by \$.01).

Complex Tax Policy - proposed issued directly affects as many as three (3) different taxes at the state or local level and requires complex analysis of each tax affected (e.g., public utility tax policy reform affected sales tax, public utility excise tax and public utility property tax).

Most Complex Tax Policy - proposed issue directly affects more than three (3) taxes at the state &/or local level & requires extensive analysis of all taxes affected (e.g., state school funding reform issue affected multiple sales taxes, income taxes, excise taxes, property taxes, etc. at both state & local levels).

Confidential Tax Issues - includes the working dollar figures going into the management side of the state of Ohio's budget having access to all revenue estimates which includes all information projected for collective bargaining. The results of the analysis of this confidential information could result in the adoption of tax policy as well as the defeat of tax policy proposed.

JOB TITLE

Tax Analysis Professional 1

JOB CODE

66841

PAY GRADE

12

EFFECTIVE

04/26/2009

CLASS CONCEPT:

The full performance level class works under direction & requires considerable knowledge of economics, public or business administration, or research & statistics in order to manage completion of fiscal analysis for basic to complex tax policy for implementation as result of analysis or review & evaluate economic & compliance data & undertake directed studies of basic to complex tax policy implications to future state revenues & prepare draft revenue forecasts.

JOB TITLE

Tax Analysis Professional 2

JOB CODE

66842

PAY GRADE

13

EFFECTIVE

11/25/2007

CLASS CONCEPT:

The advanced level class works under direction & requires thorough knowledge of economics, public or business administration, or research & statistics in order to manage completion of fiscal analysis for complex tax policy proposals, formulate complex tax policy for implementation as result of analysis & undertake self-directed studies of tax policy issues or review & evaluate economic & compliance data & undertake directed studies of complex tax policy implications to future state revenues & prepare formalized revenue forecasts.

JOB TITLE

Tax Analysis Professional 3

JOB CODE

66843

PAY GRADE

14

EFFECTIVE

11/25/2007

CLASS CONCEPT:

The expert level class works under general direction & requires extensive knowledge of economic, public or business administration, or research & statistics in order to manage completion of fiscal analysis for most complex tax policy proposals, formulate most complex tax policy for implementation as result of analysis, undertake self-directed studies of

confidential tax policy issues & act as lead worker (i.e., organize analysis, assist in training lower-level tax analysis professionals & provide work direction in absence of supervisor) over tax analysis professionals assigned to project team or review & evaluate economic & compliance data & undertake self-directed studies of most complex tax policy implications to future state revenues & prepare formalized revenue forecasts & act as economist project lead worker (i.e., organize analysis, assist in training lower-level tax analysis professionals & provide work direction in absence of supervisor (over tax analysis professionals assigned to economist project team .

JOB TITLE

Tax Analysis Professional Supervisor

JOB CODE

66845

PAY GRADE

15

EFFECTIVE

11/25/2007

CLASS CONCEPT:

The supervisory level class works under general direction & requires extensive knowledge of economics, public or business administration, or research & statistics & thorough knowledge of supervisory principles/techniques in order to supervise tax analysis professionals.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Tax Analysis Professional 1	66841	EX	04/26/2009	12

JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

Manages completion of fiscal analysis for basic to complex tax policy proposals (i.e., analyzes proposed legislation to determine revenue impacts & effects of tax administration; formulates methodologies & procedures for completing analysis; compiles data & organizes results leading to confidential & sensitive revenue related managerial recommendations to legislature, governor &/or department head), & formulates basic to complex policy for implementation as result of analysis & undertakes directed studies of confidential tax policy issues;

OR

Reviews & evaluates economic & compliance data & prepares draft revenue forecasts of basic to complex tax policy (e.g., researches & analyzes economic data & public policy; assists in modeling forecasts of state revenue; acts as liaison with agencies to collect economic information; estimates effects of tax changes & prepares reports).

Conducts general tax research (e.g., to include but not limited to conducting comparative studies among states, analyzing patterns of tax collections, assessing impacts of tax policies on industries, business or classes of individuals) as designed by supervisor & developed by employee; develops tax models.

Prepares statistical tables from raw data for inclusion in various department publications; prepares & verifies accuracy of text & information in publication.

Responds to inquiries & provides data & information to outside government agencies, other department personnel & to general public; prepares presentations on tax issues for public & private forums.

MAJOR WORKER CHARACTERISTICS:

Knowledge of economics, public policy management or public or business administration; statistics; research methodology; technical writing; state & federal laws, rules, regulations, guidelines & procedures governing Ohio tax*. Skill in use of personal computer, calculator, word processing, spreadsheets & statistical computer software*. Ability to conduct statistical analysis & interpret results; deal with large number of variables & determine specific course of action; develop or select research tools; prepare & deliver speeches &/or testimony before professional & general audiences; prepare meaningful, concise & accurate complex reports; handle confidential & potentially sensitive information.

(*) Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

Completion of graduate core coursework in economics, public or business administration, statistics or related field of study.

-Or completion of undergraduate core coursework in economics, public or business administration, statistics or related field of study; 12 mos. exp. in analytical research.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Not applicable.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Tax Analysis Professional 2	66842	EX	11/25/2007	13

JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

Manages completion of fiscal analysis for complex tax policy proposals (i.e., analyzes proposed legislation to determine revenue impacts & effects of tax administration; formulates methodologies & procedures for completing analysis; compiles data & organizes results leading to confidential & sensitive revenue related managerial recommendations to legislature, governor &/or department head), formulates complex tax policy for implementation as result of analysis & undertakes self-directed studies of confidential tax policy issues;

OR

Reviews & evaluates economic & compliance data & prepares formalized revenue forecasts of complex tax policy (e.g., researches & analyzes economic data & public policy; prepares models to forecast state revenue; acts as liaison with agencies to collect economic information; estimates effects of tax changes & prepares reports).

Develops topics & designs & conducts general tax research (e.g., to include but not limited to conducting comparative studies among states, analyzing patterns of tax collections, assessing impacts of tax policies on industries, businesses or classes of individuals); develops tax models; analyzes current tax law & policies for purpose of recommending changes or improvements in tax structure or tax administration.

Responds to inquiries & provides data & information to outside government agencies, other department personnel & to general public; prepares presentations on tax issues for public & private forums.

Prepares statistical table from raw data for inclusion in various department publications; prepares & verifies accuracy of text & information in publications.

MAJOR WORKER CHARACTERISTICS:

Knowledge of economics, public policy management or public or business administration; statistics; research methodology; technical writing; state & federal laws, rules, regulations, guidelines & procedures governing Ohio tax*. Skill in use of personal computer, calculator, word processing, spreadsheets & statistical computer software*. Ability to conduct statistical analysis & interpret results; deal with large number of variables & determine specific course of action; develop or select research tools; prepare & deliver speeches &/or testimony before professional & general audiences; prepare meaningful, concise & accurate complex reports; handle confidential & potentially sensitive information.

(*) Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

2 yrs. exp. as Tax Analysis Professional 1, 66841.

-Or completion of graduate core coursework in economics, public or business administration, statistics or related field of study; 2 yrs. exp. in academic analytical research.

-Or completion of undergraduate core coursework in economics, public or business administration, statistics or related field of study; 3 yrs. exp. in academic analytical research.

-Or equivalent of minimum class qualifications for employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Not applicable.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Tax Analysis Professional 3	66843	EX	11/25/2007	14

JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

Manages completion of fiscal analysis for most complex tax policy proposals (i.e., analyzes proposed legislation to determine revenue impacts & effects of tax administration; formulates methodologies & procedures for completing analysis; compiles data & organizes results leading to confidential & sensitive revenue related managerial recommendations to legislature, governor &/or department head), formulates most complex tax policy for implementation as result of analysis, undertakes self-directed studies of confidential tax policy issues & acts as lead worker over tax analysis professionals assigned to project team;

OR

Reviews & evaluates economic & compliance data & prepares formalized revenue forecasts of most complex tax policy (e.g., researches & analyzes economic data & public policy; prepares models to forecast state revenue; acts as liaison with agencies to collect economic information; estimates effects of tax changes & prepares reports) & acts as lead worker over tax analysis professionals assigned to economist project team.

Develops topics & designs & conducts general tax research (e.g., to include but not limited to conducting comparative studies among states, analyzing patterns of tax collections, assessing impacts of tax policies on industries, businesses or classes of individuals); develops tax models; analyzes current tax law & policies for purpose of recommending changes or improvements in tax structure or tax administration.

Prepares statistical tables from raw data for inclusion in various department publications; prepares & verifies accuracy of text & information in publications.

Responds to inquiries & provides data & information to outside government agencies, other department personnel & to general public; prepares & makes presentations on tax issues for public & private forums.

MAJOR WORKER CHARACTERISTICS:

Knowledge of economics, public policy management or public or business administration; statistics; research methodology; technical writing; state & federal laws, rules, regulations, guidelines & procedures governing Ohio tax*. Skill in use of personal computer, calculator, word processing, spreadsheets & statistical computer software*. Ability to conduct statistical analysis & interpret results; deal with large number of variables & determine specific course of action; develop or select research tools; prepare & deliver speeches &/or testimony before professional & general audiences; prepare meaningful, concise & accurate complex reports; handle confidential & potentially sensitive information.

(*) Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

2 yrs. exp. as Tax Analysis Professional 2, 66842.

-Or completion of graduate core coursework in economics, public or business administration, statistics or related field of study; 4 yrs. exp. in academic analytical research.

-Or completion of undergraduate core coursework in economics, public or business administration, statistics or related field of study; 5 yrs. in academic analytical research.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Not applicable.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Tax Analysis Professional Supervisor	66845	EX	11/25/2007	15

JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

Supervises tax analysis professionals, provides training, direction & guidance in programmatic policies & procedures (e.g., revenue estimates, tax policy analysis, general tax research), reviews, directs & approves analysis & policy recommendations from staff concerning tax research matters & estimates how tax laws provide revenue to state, how changes in law might affect revenues & recommends possible enactments of measures providing other forms of taxation.

Conducts general, project specific & legislative tax research & analysis; makes forecasts of state revenues, reviews & studies tax administration & policies in order to make recommendations for improvements.

Responds to inquiries & provides data, information, interpretation & analysis to outside government agencies, other department personnel & to general public; prepares & makes presentations on tax policy, administration & other issues in public or private forums; negotiates tax policy recommendations; represents tax commissioners at public & private meetings.

Reviews, edits & prepares publications (i.e., for assigned division) for printing.

MAJOR WORKER CHARACTERISTICS:

Knowledge of economics, public policy management or public or business administration; statistics; research methodology; technical writing; state & federal laws, rules, regulations, guidelines & procedures governing Ohio tax*; supervisory principles & techniques*; managerial principles & techniques*. Skill in use of personal computer, calculator, word processing, spreadsheets & statistical computer software*. Ability to conduct statistical analysis & interpret results; deal with large number of variables & determine specific course of action; develop or select research tools; prepare & deliver speeches &/or testimony before professional & general audiences; prepare meaningful, concise & accurate complex reports; handle confidential & potentially sensitive information; establish friendly atmosphere as supervisor.

(*) Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

2 yrs. exp. as Tax Analysis Professional 3, 66843.

-Or completion of graduate core coursework in economics, public or business administration, statistics or related field of study; 6 yrs. exp. in academic analytical research.

-Or completion of undergraduate core coursework in economics, public or business administration, statistics or related field of study; 7 yrs. exp. in academic analytical research.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Not applicable.