STATE OF OHIO (DAS) CLASSIFICATION SPECIFICATION	**CLASSIFICATION SERIES** Tax Analyst	**SERIES NUMBER** 6682
	MAJOR AGENCIES Taxation only	**EFFECTIVE** 02/04/2018

SERIES PURPOSE:

The purpose of the tax analyst professional occupation is to forecast future state revenues & prepare draft revenue forecasts based upon proposed legislative tax policy.

At the advanced administrative level, incumbents act as tax forecasters in order to analyze proposed legislation (e.g., new tax types, alterations to existing tax types, elimination or deletions of tax types) to determine revenue impacts for legislature, General Assembly, Governor & Legislative Services Commission & to forecast total future state tax revenues for OBM (Office of Budget & Management) to determine funding for departments & agencies on a statewide, agency wide basis involving multiple billions of dollars.

GLOSSARY:

Forecasting future state tax revenues – the continuous study of the practical operation of all taxation & revenue laws of Ohio, the manner in which & extent to which such laws provide revenue for the support of Ohio & its political sub-divisions, the probable effect upon such revenues of possible changes in existing laws & the possible enactment of measures providing for other forms of taxation.

JOB TITLE	**JOB CODE**	**PAY GRADE**	**EFFECTIVE**
Tax Analyst	66825	44	02/04/2018

CLASS CONCEPT

The advanced administrative level class works under direction & requires thorough knowledge of economics, statistics & research methodologies, public or business administration & applicable state & federal tax laws, rules & procedures to act as tax forecaster in order to analyze proposed legislation (e.g., new tax types, alterations to existing tax types, elimination or deletion of tax types) to determine revenue impacts for legislature, General Assembly, Governor & Legislative Services Commission & to forecast total future state tax revenues for OBM (Office of Budget & Management) to determine funding for departments & agencies on a statewide, agency wide basis involving multiple billions of dollars.

JOB TITLE	JOB CODE	B. U.	EFFECTIVE	PAY GRADE
Tax Analyst	66825	EX	02/04/2018	44

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.)

Acts as tax forecaster in order to analyze proposed legislation (e.g., new tax types, alterations to existing tax types, elimination or deletions of tax types) to determine revenue impacts for legislature, General Assembly, Governor & Legislative Services Commission & to forecast total future state tax revenues for OBM (Office of Budget & Management) to determine funding for departments & agencies on a statewide, agency wide basis involving multiple billions of dollars.

- Analyzes & evaluates taxes & tax proposals (e.g., revenue effects of a tax), formulates methodologies & procedures for completing analysis, compiles & prepares results.
- Forecasts future state revenues & prepares draft revenue estimates of proposed tax legislation.
- Uses Statistical software (e.g., SAS), forecasting software (e.g. E-Views), data base user interface & query software, document management software, electronic mail software & spreadsheet software (e.g., Excel) to develop & maintain databases & models.
- Analyzes & estimates state tax expenditures.
- Monitors revenue collections for general revenue fund taxes.
- Forecasts general revenue fund taxes &/or models &/or studies them (i.e., by applying econometric methods).
- Coordinates &/or conducts tax research studies (e.g., medical marijuana, casino gambling, fracking) to determine future impacts & outcomes for Ohio based on data from other states, agencies, local, state & federal officials & research groups & think tanks.
- Prepares statistical tables from raw data for inclusion in various departmental publications, prepares & verifies accuracy of text & information in publication.
- Responds to inquiries & provides data & information on tax issues to public & private forums.

MAJOR WORKER CHARACTERISTICS:

Knowledge of:
- Economics — Knowledge of principles & micro & macroeconomics &/or public finance & econometric methods that may be applied to forecast tax revenues &/or models &/or study taxes.
- Public or business administration.
- Statistics – Knowledge of probability theory, descriptive & inferential statistics & statistical sampling.
- Project leadership tools & methods.
- Research methodology.
- Law & Government — Knowledge of laws, legal codes, court procedures, precedents, government regulations, executive orders, & agency rules pertaining to taxation.*
- Taxation Office Practices & Procedures — Knowledge of office procedures & systems such as managing files & records, designing forms, & other office procedures & terminology.*
- Mathematics — Knowledge of arithmetic, algebra, calculus & their applications for problem solving.
- Statistical software (e.g., SAS), query languages & data base analysis techniques as necessary to apply econometrics or forecasting methods.
- Technical & report writing.*

Skill in:
- Computer Use – Skill in using a personal computer & applicable software (e.g., word processing, spreadsheet, database, statistical packages).

Ability to:
- Critical Thinking — Using logic & reasoning (including finding relationships among seemingly unrelated events) to identify various solutions, conclusions, or approaches to complex problems; evaluate their strengths & weaknesses (including understanding implications for future decision-making); & choose the most appropriate one).
- Oral & Written Comprehension — The ability to listen to, read, & understand information & ideas presented through spoken words, sentences, & writing.
- Oral Expression — The ability to communicate information & ideas in speaking so intended audience (e.g., taxpayers, tax practitioners, attorneys, CPAs, Enrolled Agents, & other government personnel) will understand.
- 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.
- Written Expression – The ability to communicate effectively in writing as appropriate for the needs of the audience (e.g., taxpayers, tax practitioners, attorneys, CPAs, Enrolled Agents, & other government personnel) including using the correct meaning & spelling of words, rules of composition, & grammar.
- Problem Sensitivity — The ability to tell when something is wrong or is likely to go wrong. It may not involve solving the problem, only recognizing there is a problem.
- Establish & Maintain Effective Working Relationships – The ability to develop constructive & cooperative working relationships with others & maintain them over time.
- Prepare meaningful, concise & accurate reports.
- Undertake independently or as directed studies of tax policy issues.
- Collaborate with individuals in different fields of expertise (e.g., attorneys, budget analysts).
- Taxation Office Practices & Procedures — Knowledge of office procedures & systems such as managing files & records, designing forms, & other office procedures & terminology.*

(*) Developed after employment

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:
Completion of graduate core program in economics, statistics, business administration or public administration; 36 mos. trg. or 36 mos. exp. in use of statistical software (e.g., SAS), query languages & data base analysis techniques; 36 mos. trg. or 36 mos. exp. in tax law & government structure & process (e.g., laws, legal codes, court procedures, precedents, government regulations, executive orders & agency rules pertaining to taxation); 36 mos. trg. or 36 mos. 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.