

## TAX RESEARCH ANALYST

### NATURE OF WORK

Work in this class involves the study and analysis of taxation and other problems of public finance, requiring the execution of special research studies, which usually do not necessitate complex technical legal or fiscal analysis.

Work assignments are received in discussions with a Public Finance Analyst, and include a statement of the scope and conduct of proposed projects, as well as suggestions regarding possible data sources and method of analyzing obtained information. Work is guided by professional research methods, statistical theory, initial instructions, and by discussions with the supervisor during the progress of research projects. Details of the actual work procedure, organization of the project, and methods of presenting information in the final report, are left to the determination of this employee, within the limitations of established work guides. The employee works independently during a study, conferring with his supervisor on unusual problems in the interpretation and analysis of data. Work is reviewed during the conduct of a study for progress and suitability of methods used. Completed research projects are reviewed by the supervisor for adequacy of coverage, terminology, effectiveness of presentation, and soundness of recommendations. Evaluation of the work of a Tax Research Analyst is based on initiative in developing appropriate research methods, objectivity, and adherence to departmental policies.

### ILLUSTRATIVE EXAMPLES OF WORK

Receives assigned problem for study, including general outline of methodology to be used; analyzes assigned problem; determines working plan of research project; selects sources of information and applicable statistical treatment, with approval of supervisor; directs subordinate personnel in the methods of collecting, compiling, and tabulating data; designs forms and tables for collecting and tabulating data, and designs graphs, charts, and tables for summarizing, information and indicating relationships.

Writes reports of research studies, which may include historical background, comparisons of pertinent tax laws of several states, and summary and analysis of obtained statistical data; develops proposals and recommendations for inclusion. In reports; indicates advantages and disadvantages of, proposals; submit completed reports to supervisor for review and editing. .

Studies and analyzes, publications and reports relating to taxation and other problems of public finance, general economic theory and practice, and current economic trends and developments, for the purpose of increasing knowledge in these fields and for use in assigned research studies, revenue estimating, and analysis of revenue collections.

Prepares independent estimates of anticipated tax and non-tax revenue collections for the state using assigned analytical and/or statistical treatment of past trends of collections and of economic data for the nation, the federal reserve district, and the state; determines possible future trends of revenue collections based on these studies; submits prepared estimates to the director for use in arriving at a departmental estimate.

Assists in preparation of biennial report by collecting and compiling data, writing portions of the text as assigned; submits material to supervisor for review and editing.  
Performs related work as required.

#### KNOWLEDGE, SKILLS, AND ABILITIES

Working knowledge of public finance theory and practice particularly in the field of taxation.  
Working knowledge of economic theories and principles and of economic trends and developments.  
Working knowledge of the theory and practice of statistical treatment of fiscal and economic data.  
Some knowledge of the sources, reliability, and validity of fiscal and economic data.  
Ability to organize and conduct research projects,  
Ability to analyze a variety of fiscal and economic data including tax laws, to draw valid conclusions, and to make recommendations based on analyses.  
Ability to plan, organize, and prepare research reports and to present statistical and analytical information in a clear and concise manner.  
Ability to design forms, tables, and graphs for ease in gathering, tabulating, and summarizing fiscal and economic data,  
Ability to establish and maintain effective working relations with persons and groups contacted while conducting research projects.

#### ACCEPTABLE TRAINING AND EXPERIENCE

Graduation from a four-year college or university and two years experience in research work, of which one year must have been in economic research. (One, year of graduate work consisting of thirty semester hours or forty-five quarter hours may be substituted for the required experience on a year-for-year basis.)

Special Note - This is a generalized representation of positions in this class and is not intended to identify essential functions per ADA. Examples of work are primarily essential functions of the majority of positions in this class, but may not be applicable to all positions.