

STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION

REVENUE ECONOMIST - CONFIDENTIAL
CLASSIFICATION SERIES

I. INTRODUCTION

A. Purpose of this Classification Specification

This classification specification is the basic authority under Wis. Admin. Code ER-Pers 2.04 for making classification decisions relative to present and future professional Revenue Economist – Confidential positions located within the Department of Revenue (DOR) Division of Research and Policy. Positions allocated to this classification spend the majority of their time performing research and analysis on tax policy, Wisconsin's revenue structure, tax relief programs, database creation and maintenance, development of fiscal estimates, and evaluation and forecasting of the state's economy. This classification specification will not specifically identify every eventuality or combination of duties and responsibilities of positions that currently exist, or those that result from changing program emphasis in the future. Rather, it is designed to serve as a framework for classification decision-making in this occupational area.

Classification decisions must be based on the "best fit" of the duties within the existing classification structure. The "best fit" is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the class concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of representative positions; job evaluation guide charts, standards or factors; statements of inclusion and exclusion; licensure or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification. In classifying these positions, when work activities overlap several adjacent classes within this series, the importance, autonomy, and frequency of these activities impact the final classification decision.

B. Inclusions

The positions in this classification are professional positions located within DOR's Division of Research and Policy which conduct research and analysis of state and local tax policy; evaluate, model, and make recommendations pertaining to state aid and state shared revenue programs; develop revenue estimates and economic forecasts; and provide guidance to other executive and legislative agencies on economic conditions.

More specifically, these positions:

- Develop revenue estimates used in the development of the Governor's budget bill and provide guidance to the Legislative Fiscal Bureau for revenue estimates released by that office.
- Provide analysis of the state's economy and analysis of proposed and existing tax policy and tax relief policy to assist the Governor's Office, the Department of Administration's State Budget Office, the Legislative Fiscal Bureau, and the Legislature as a whole.
- Conduct policy and fiscal research with special emphasis on applying quantitative methods, financial analysis techniques, and economic research.

- Provide policy and fiscal analysis of proposed, pending, and passed legislation to aid the legislative programs of both the Executive and Legislative branches of state government.
- Model and describe both existing and proposed state aid and state tax relief efforts to improve local government officials' understanding of state aid and tax relief measures (including levy limits).
- Develop detailed reports, databases, and evaluations pertaining to the state's economy, tax collections, state and local tax burden, and the revenue foregone from tax exemptions.
- Provide guidance on the state economy and tax policy to other state agencies, colleges and universities, economic development associations, and private policy research organizations.

Positions in this classification must meet the definition of "Confidential" as set forth in s. 111.81(7), Wis. Stats., i.e., the duties must be such that the incumbents are "individuals who are privy to confidential matters affecting the employer-employee relationship."

C. Exclusions

Excluded from this classification series are:

1. Positions which do not meet the statutory definition of "Confidential" as defined in Wis. Stats. 111.81(7) as administered and interpreted by the Wisconsin Employment Relations Commission.
2. Positions which do not meet the definition of professional as defined by s. 111.81(15) Wis. Stats., as administered and interpreted by the Wisconsin Employment Relations Commission.
3. Positions which are, for a majority of the time, engaged in performing research and analysis or planning functions more appropriately classified as Research Analyst or Program and Policy Analyst.
4. Positions which are **not** located within Department of Revenue.
5. Positions that function as team leaders within the Department of Revenue's Division of Research and Policy.
6. All other positions, which are more appropriately, identified by other classification specifications.

D. Entrance Into and Progression Through This Classification Series

Employees enter positions in this classification series by competition. Each level within this series may be an objective level. Reclassification to the senior and advanced levels will be permitted only when it can be demonstrated that the change in duties and responsibilities justifying the class change are a logical and gradual outgrowth of the position's previous duties and responsibilities. Positions with leadworker duties will be filled by competition.

E. Classification Factors

Individual position allocations are based on the following general classification factors:

1. The freedom or authority to make decisions and choices and the extent to which the position is responsible to higher authority for actions taken or decisions made;
2. Information or facts such as work practices, rules, regulations, policies, theories and

- concepts, principles and processes which an employee must know and understand to be able to do the work;
3. The difficulty in deciding what needs to be done and in performing the work;
 4. The relative breadth, variety and/or range of goals or work products and the impact of the work both internal and external to the work unit;
 5. Type of supervision received;
 6. Organizational status as it relates to level of responsibility;
 7. The nature and level of internal and external coordination and communication required to accomplish objectives;
 8. The degree the position is a resource for other divisions in DOR and a resource for external parties;
 9. The degree the position is a direct resource — for other divisions and external parties including the DOR Secretary's Office, DOA, and LFB — without channeling information though or in the presence of an immediate supervisor;
 10. The degree the position assists other divisions within DOR to develop data structures that are advantageous for both the requesting division (for its administrative needs) and the Division of Research and Policy (for its research and analysis needs);
 11. The types and range of software packages utilized for the analysis of complex and large databases;
 12. The degree the position requires established expertise with a base and scope of knowledge of tax and tax relief issues – including tax statutes, tax related court decisions, federal tax policy, the state's economy, and the legislative history of tax and tax relief issues.
 13. The degree the position necessitates illustrated knowledge of DOR specific databases and data sources, developed working relationships and insight into the nature (including the strengths and limitations) of DOR specific databases.
 14. The degree the position entails mastery of the appropriate DOR specific or general software tools necessary to productively and selectively use DOR tax and tax relief databases.
 15. The degree the position requires the incumbent to directly engage with LFB and DOA staff in discussing policy options, statutory language changes and concerns, and estimating methodologies.
 16. The degree to which the position requires the ability to design and develop, or direct the development of, microsimulation models on the state's major taxes.

II. DEFINITIONS

Positions allocated to the Revenue Economist - Confidential classification series perform research and analysis functions related to the various taxes and programs administered by the DOR, including but not limited to individual income, corporate income, sales, excise, utility and property taxes, as well as the Homestead credit, earned income credit, shared revenue and lottery credit. They also perform economic research and forecasting for the national and Wisconsin economies. Positions assist in the preparation of

budget requests pertaining to tax and tax relief policy; provide analysis and guidance to advise and assist both the Executive and Legislative branches of state government in the development and implementation of tax policy and tax relief efforts; provide General Purpose Revenue forecasts, and provide policy and fiscal analysis of proposed legislation and current law.

REVENUE ECONOMIST - CONFIDENTIAL

Positions at this level perform Revenue Economist-Confidential work under close progressing to limited supervision where job duties provide econometric, policy, and fiscal analysis to help the Governor and the Legislature in their deliberations on state tax policy and state and local finance matters. Positions provide revenue estimates, economic forecasts, estimates of the fiscal effect of existing and proposed tax and tax relief efforts, develop recommendations on whether bills should be vetoed or signed; identify policy options; and prepare budget and policy issue analyses.

Unlike positions at the Senior and Advanced levels, positions at this level are still developing and obtaining a base and scope and/or depth of relevant knowledge of:

1. tax and tax relief policy issues;
2. the state's economy;
3. the legislative history of tax and tax relief issues;
4. DOR specific databases and data sources – including knowledge of how to access, utilize, and evaluate DOR data;
5. state statutes; administrative rules, and agency practices
6. the division's work products, existing methodologies, and communications.

Positions under close supervision receive specific guidelines and instructions from the supervisor on work assignments, and the supervisor determines the priorities and provides clearly defined objectives. Work assignments are established by the supervisor on a short-term basis and the position's work is reviewed daily or weekly. Positions under close supervision work with the supervisor or receive training & consultation from a Revenue Economist-Confidential- Sr or Advanced (RE-Conf-Sr or Adv) staff member to determine the appropriate methodology used in the analysis for most assignments and often rely on the approach previously used for similar types of analysis. The supervisor for these positions or a RE-Conf- Sr or Adv staff position must provide guidance as to techniques and resources; and also review the methodology, results, and written work products.

Closely supervised positions interact with counterparts in agencies, but generally not top management officials; and the supervisor normally accompanies the analyst to briefings and meetings and takes the lead in briefing officials, allowing the analyst to fill in details.

As positions gain the necessary knowledge and experience to work under limited supervision and achieve objective level, work assignments are established on both a long-term and short-term basis with an increased degree of autonomy for determining the means and methods of accomplishing the assigned duties. Goals and duties are stated in broad terms without specific direction and positions show greater independence in choosing the appropriate methodology to be used for each assignment (while the supervisor or a RE-Conf- Sr or Adv continues to review the methodology and results for completeness, accuracy, and adherence to policy). Objective level positions make more independent determination of the content of final documents. These positions may increasingly be involved in meetings and communications with agency officials (both internal and external to DOR) on policy, fiscal, and technical matters either with or without the supervisor.

Work products may still be subject to close review, but objective level positions have sufficient knowledge and skills to begin an assignment without need to receive direction from the supervisor or another RE-Conf- Sr or Adv before proceeding.

This professional class develops a foundation in the principles of tax policy and/or econometric analysis

and the division's operations.

These positions require specialized skills to conduct and continually analyze methods, systems or procedures. Activities have specific objectives and content. Positions at this level provide required information to the supervisor by summarizing findings and identifying problem areas. For bills introduced into the legislature, these activities will result in fiscal notes and technical memos to become part of legislative and executive branch policy and budget deliberations. As positions gain the necessary knowledge and experience to work under limited supervision, they may increasingly be involved in meetings and communications with agency officials (both internal and external to DOR) on policy, fiscal, and technical matters either with or without the supervisor.

Work products may still be subject to close review, but positions have sufficient knowledge and skills to begin an assignment without need to consult the supervisor.

REVENUE ECONOMIST - CONFIDENTIAL - SENIOR

This is the senior level within this Revenue Economist - Confidential classification series. Positions at this level differ from the entry and objective level positions as described in the Revenue Economist-Confidential description in that work assignments are long-term and/or ongoing without any supervisor directive and are broadly defined in relation to the position's total assignment.

Positions at the senior level have demonstrated a developed base and scope and/or depth of relevant knowledge of:

1. tax and tax relief policy issues;
2. the state's economy;
3. the legislative history of tax and tax relief issues;
4. DOR specific databases and data sources – including knowledge of how to access, utilize, and evaluate DOR data.
5. state statutes; administrative rules, and agency practices;
6. the division's work products, existing methodologies, and communications.

Positions at this level develop and work on major work products with little or no specific direction or review; and the supervisor reviews the work after it is completed for informational or evaluation purposes. Positions determine the appropriate methodology to be used and develop necessary data sources, databases, and information sources in a fully independent and self-determined manner.

The workload for the Revenue Economist – Confidential series can be irregular and/or cyclical (based on the biennial budget cycle and the timing and duration of legislative sessions). Positions at the Senior level independently determine how to utilize time periods that contain fewer immediate deadlines. Very minimal direction is needed from the team leader for determining how to productively use off-peak periods in the legislative/budget cycle.

Based upon business needs, analysts coordinate working groups on issue development; provide solutions and direct negotiations on complex issues; and they provide training and consultation to junior analysts.

Under general supervision, this professional class builds upon the foundation of the principles of a general field of knowledge sufficient to critique and evaluate the activities and outcomes of the professional work of staff from other agencies.

REVENUE ECONOMIST – CONFIDENTIAL - ADVANCED

This is the advanced level within the Revenue Economist - Confidential classification series. Positions at this level perform functions whose duties require considerable knowledge and function, under general supervision, as the recognized departmental expert and/or resource.

Based upon business needs, advanced level positions direct and/or conduct and execute very complex studies for areas with little or no procedural precedent which have major department and/or statewide policy implications.

These positions require a broad grasp of advanced principles and theories of a specialized field of knowledge and demonstrate the strongest analytic technical and communication skills.

Positions at the advanced level have demonstrated an extensive and intuitive base and scope and/or depth of relevant knowledge of:

1. tax and tax relief policy issues;
2. the state's economy
3. the legislative history of tax and tax relief issues;
4. DOR specific databases and data sources – including knowledge of how to access, utilize, and evaluate DOR data.
5. state statutes; administrative rules, and agency practices;
6. the division's work products, existing methodologies, and communications.

Advanced level positions exhibit a full mastery of the relevant DOR databases and appropriate software tools and have substantial direct working relationships with appropriate professional positions both internal and external to the department.

Based on their extensive and intuitive degree of knowledge, advanced level positions are expected to anticipate the need for economic and/or tax knowledge or data; to access the adequacy of existing databases within the department; to identify shortcomings in statutes and/or analytical tools, and make plans to remedy the shortcomings within the scope of the position's authority. Due to their advanced knowledge, they will also provide training, consultation to junior analyst on a range of issues (e.g. project work, appropriate methodology to utilize in an analysis, techniques, resources, written work products, etc.)

The analyst develops and follows their own broadly defined work objectives. They also have extensive authority to directly deal with agency top officials, policy staff, the Secretary, the State Budget Office, and the Legislative Fiscal Bureau – on issue areas, especially in highly sensitive and complex issues and areas and other work assignments. These issues can result in the analyst having to serve on an outside agency task force or staff a gubernatorial commission. The review of the work is limited to broad administrative evaluation by the supervisor.

III. QUALIFICATIONS

The qualifications required for these positions will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed and by an identification of the education, training, work or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

IV. ADMINISTRATIVE INFORMATION

The Revenue Economist-Confidential progression series classification is created effective August 28, 2011 and announced in Bulletin OSER-0283-MRS/SC to partially restore the progression series that existed prior to the implementation of the broadband pay structure and to better define the levels of work that currently exist. Positions were previously classified as Economist—Confidential.