

Minimum Qualification Specifications
for the Class:

TAX RESEARCH AND PLANNING OFFICER
(TAX RESEARCH & PLANNING OFFCR)

Basic Education/Experience Requirements

Graduation from an accredited four (4) year college or university with a bachelor's degree which included a minimum of six (6) semester credit hours or its equivalent in the area of statistics; including but not limited to course work in statistical inference, confidence intervals, hypothesis testing, regression theory and other topics of commensurate difficulty and responsibility.

Excess work experience as described under the General or Specialized Experience, below, or any other responsible administrative, professional or analytical work experience that provided knowledge, skills and abilities comparable to those acquired in four (4) years of successful study while completing a college or university curriculum leading to a baccalaureate degree may be substituted on a year-for-year basis except for the coursework in statistics. To be acceptable, the experience must have been of such scope, level and quality as to assure the possession of comparable knowledge, skills and abilities.

The education or experience background must also demonstrate the ability to write clear and comprehensive reports and other documents; read and interpret complex written material; and solve complex problems logically and systematically.

Experience Requirements

Applicants must have had progressively responsible experience of the kind, quality and quantity described in the following paragraphs, or any equivalent combination of training and experience:

General Experience: Two (2) years of progressively responsible work which has provided an understanding of the principles of policy and program development, statistical and technical analysis, administration and economics. This work experience must demonstrate the individual's ability to develop and direct studies designed to evaluate complex economic policies and programs currently in effect and having broad basis in either the public sector or a large corporation. In the course of conducting these studies the individual should have demonstrated the ability to recognize and acquire significant data, determine processes by which to analyze the data either statistically or by other evaluative methods and extrapolate not only the economic

implications and ramifications produced by parametric modification but also forecast the final overall results. The results of these studies and analyses should be of such merit as to be significant to the decision-making process involved in producing major public or corporate policy statements and programs. Further, this work should demonstrate the applicant's awareness of administrative concerns and the ability to formulate a comprehensive, integrated, statistically-based program which incorporates administrative constraints and considerations.

Examples of qualifying General Experience include but are not limited to the following:

- (a) Progressively responsible experience as a major participant or director involved in economic research of a federal, State or municipal bureau, private board, foundation, industrial or business concern involved in the organization, planning, direction and integration of the activities of a staff of research economists and statisticians.
- (b) Progressively responsible experience as a consultant or advisor engaged in rendering expert opinion respecting economic plans and programs of the most complex nature and having significant impact on the public or private sector advisees' policy decisions and program development.
- (c) Progressively responsible experience on a senior level planning board consisting of a thorough analysis of economic data and its incorporation into sound economic policy, programs and recommendations.
- (d) Progressively responsible experience as an independent research economist preparing broad and comprehensive analytical studies relating to programs and projects of the greatest difficulty, complexity and diversity.

Specialized Experience: Three (3) years of progressively responsible work experience which involved performing or directing work related to the application of statistical analysis methodology directed at the evaluation of the impact and ramifications on various target groups produced by modification of the prevailing financial conditions, governing regulations or presumptive basis, by means of statistical models and formulae. Such experience must demonstrate knowledge of the current state of the science of evaluative techniques and concepts; current information sources in the field of public finance and economics; and the ability to exercise initiative and insight in the analysis of programs and proposals involving public finance and prevailing economic conditions with respect to both short- and long-range implications.

Supervisory Experience: Two (2) years of experience supervising technical employees in the conduct of research projects. This experience may have been concurrent with the General or Specialized Experience described above. The supervisory work experience must have included: 1) planning, organizing, scheduling, and directing the work of others; 2) assigning and reviewing their work; 3) advising them on difficult work problems; 4) training and developing subordinates; and 5) evaluating their work performance.

Administrative Experience: One (1) year of administrative experience which involved active participation in, and major responsibility for the development, management, execution and coordination of policies and programs.

Substitutions Allowed

- 1) A master's degree in economics, statistics or a related field obtained after completing a thesis or research paper may be substituted for two (2) years of general experience.
- 2) A Ph.D. degree in economics or related field may be substituted for the general experience and one (1) year of the specialized experience.

Quality of Experience

The combined education and experience must demonstrate knowledge of the principles of taxation, statistical analysis techniques, public finance, economics, and public administration. It is essential that the background not only indicate knowledge of these principles, but more importantly demonstrate the ability to apply the knowledge in conjunction with research and analytic techniques in evaluations contributing to the development of public or corporate programs, proposals, policies and recommendations.

In addition, for all of the different areas described above, the education or experience background must demonstrate that the individual possesses the ability to organize, develop and direct economic and statistical analyses; the ability to make independent and reliable judgmental decisions on matters having import and significance; the ability to write summary reports in a form suitable for publication; the ability to conduct statistical analyses and program evaluations; the ability to speak persuasively and effectively; and the ability to interact with others to establish effective working relationships, as an advisor or consultant.

Possession of the required number of years of experience will not in itself be accepted as proof of qualification for a position. The applicant's overall experience must have been of such scope and level of responsibility as to conclusively demonstrate that

he/she has the ability to perform the duties of the position for which he/she is being considered.

Selective Certification

Specialized knowledge, skills and abilities may be required to perform the duties of some positions. For such positions, Selective Certification Requirements may be established and certification may be restricted to eligibles who possess the pertinent experience and/or training required to perform the duties of the position.

Agencies requesting selective certification must show the connection between the kind of training and/or experience on which they wish to base selective certification and the duties of the position to be filled.

Tests

Applicants may be required to qualify on an appropriate examination.

Physical and Medical Requirements

Applicants must be able to perform the essential functions of the position effectively and safely, with or without reasonable accommodation.

This is an amendment to the minimum qualification specifications for the class TAX RESEARCH AND PLANNING OFFICER approved on August 30, 1982.

Date Approved: 12/11/15

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