

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 ER 2.04, Wis. Admin. Code 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

This classification series encompasses professional positions located within the Department of Revenue's Division of Research and Policy that 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. Positions in this classification series must meet the definition of confidential as defined in s. 111.81(7), Wis. Stats.

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 in Section 370.030 of Wisconsin Human Resources Handbook Chapter 370.

3. Positions which perform research and analysis or planning functions more appropriately classified as Research Analyst or Program and Policy Analyst.
4. Positions which are not located within the 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 for entry-level positions. Progression to the Consultant level typically is through reclassification, based on the achievement of the required training and experience.

## II. DEFINITIONS

Positions allocated to the Revenue Economist - Confidential classification series perform research and analysis 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. Positions 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; provide policy and fiscal analysis of proposed and current legislation; 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.

Positions 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; 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; and provide guidance on the state economy and tax policy to other state agencies, colleges and universities, economic development associations, and private policy research organizations.

### **REVENUE ECONOMIST - CONFIDENTIAL**

This classification is used as an entry progressing to a developmental level for positions which perform Revenue Economist – Confidential duties. Work is performed under limited progressing to general supervision. Positions 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.

Positions interact with counterparts in agencies and 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.

This entry-level professional class requires specialized skills to conduct and continually analyze methods, systems or procedures. Activities have specific objective and content. Provides required information to supervisor by summarizing findings, identifying problems areas and recommending methods to improve operations.

### **REVENUE ECONOMIST - CONFIDENTIAL - SENIOR**

This is the senior level for professional positions performing Revenue Economist - Confidential duties. Work is performed under general supervision.

Positions at this level perform all of the duties identified at the Revenue Economist – Confidential level, but differ in that work assignments are established on both a long-term and short-term basis.

Objectives are stated in broad terms without specific direction. The supervisor reviews the work after it is completed to determine completeness and adherence to policy. Positions at this level are often involved in meeting with agencies' management officials on policy discussions without the supervisor.

Positions at this level continually make more sensitive decisions and recommendations and function under limited progressing to general supervision. This professional class requires a foundation in the principles of a general field of knowledge related to topic specific policy analysis or operations.

### **REVENUE ECONOMIST – CONFIDENTIAL - ADVANCED**

This is the full performance level for professional positions performing Revenue Economist – Confidential duties.

Positions at this level perform all of the duties identified at the Revenue Economist – Confidential – Senior level and in addition: positions direct and/or conduct complex studies for areas with little or no procedural precedent which impact major department and/or statewide policy impact; analyze legislative proposals and provide policy and fiscal analysis, as well as alternative proposals; conduct research projects and issue papers; and conduct tax policy analysis. Positions provide guidance and consultation to less experienced staff on project work, the appropriate analytical methodology, resources, and work products.

Positions 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 at this level assume a nearly independent role in working with agency officials, policy staff and the Secretary on issue areas and work assignments often cross agencies' program or functional areas of responsibility.

Analysts may coordinate working groups on issue development, provide solutions, and direct negotiations on complex issues. Positions at this level make more decisions independently on more sensitive and political matters.

The review of the work is limited to broad administrative evaluation by the supervisor.

### **REVENUE ECONOMIST – CONFIDENTIAL – CONSULTANT**

This is the consultant level for professional positions performing Revenue Economist – Confidential duties.

Positions at this level perform all of the duties identified at the Revenue Economist – Confidential – Advanced level and in addition: positions function as the agency’s primary expert and consultant for specific areas, such as statewide tax reform initiatives, and are a direct resource for other divisions in the department, the Governor’s Office, the State Budget Office, and the Legislative Fiscal Bureau. Positions at this level lead and coordinate working groups on issue development, provide solutions, and direct negotiations on complex issues. Positions regularly produce authoritative technical guides; serve as a management advisor and provide analysis and advice on statewide tax reform initiatives and other matters to the Department of Revenue Secretary, State Budget Office, the Governor’s Office, and the Legislature for major initiatives that are controversial and impact the entire agency and the state’s resources.

The analyst develops and follows their own broadly defined work objectives and 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.

This classification series was modified effective May 26, 2019 and announced in Bulletin DPM-0497-CC/SC to create the Revenue Economist – Confidential – Consultant classification level and update classification specification language.

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