

New York State Department of Civil Service

DIVISION OF CLASSIFICATION & COMPENSATION

Classification Standard

Occ. Code 1790100

Tax Policy Analyst 1, Grade 18	1790100
Tax Policy Analyst 2, Grade 23	1790200
Tax Policy Analyst 3, M-2	1790300
Tax Policy Analyst 4, M-4	1790410

Brief Description of Class Series

Tax Policy Analysts evaluate the State's tax structure and the effect of changes on taxpayers, businesses, the economy, and tax revenues. They develop and implement statistical tax studies and conduct policy research; report their findings from simulations and forecasting models to executive managers, the legislature, the New York State Division of the Budget, and other State and local agencies; and develop tax-related legislative proposals and data regarding revenue estimates of such proposals.

These positions are classified only at the Department of Taxation and Finance.

Distinguishing Characteristics

Tax Policy Analyst 1: entry level; collects and analyzes routine tax data and performs tax policy research.

Tax Policy Analyst 2: full performance level; collects, analyzes, and reports tax data and forecasting model outputs; carries out segments of larger projects; assists in the development of new tax policy or changes to existing tax policy; and may supervise Tax Policy Analysts 1.

Tax Policy Analyst 3: first supervisory level; conducts the full range of tax policy research activities; directs major studies; and formulates new policies.

Tax Policy Analyst 4: section head; plans and directs all tax policy research and analysis activities; develops and recommends legislative tax policy to executive leaders; and conducts studies of important interest to the agency.

Related Classes

Economists apply economic theories to the collection and analysis of economic information and data and prepare interpretative reports. Incumbents design and evaluate long-term simulations and econometric models for the purpose of forecasting which may include constructing and maintaining databases for use in conjunction with models.

Statisticians apply statistical theory and principles to the planning, execution, control, and analysis of statistical studies, and in providing technical assistance and advice in the application of statistical methods. Statistical techniques such as sampling, regression, and correlation, analysis of time series, and analysis of variance are examples of the analytical and inferential tools used.

Illustrative Tasks

Tax Policy Analyst 1: reviews tax forms for accuracy to facilitate statistical analysis; assists in statistical, policy, and legal research to make informed, detailed fiscal estimates of tax and revenue changes; assists in the compilation of fully verified micro data files for major tax types such as Personal Income Tax (PIT), Article 9A (C-corporate franchise), Article 32 (banking franchise), Article 33 (insurance franchise), and Article 9 (corporations and utilities); assists in the maintenance of tax micro simulations and econometric models used for revenue projections and forecasts, and to estimate the impact of proposed and existing tax law changes on taxpayer behavior, tax revenue, and economic activity; assists in researching alternate taxation methods and recommends revisions to the tax structure, including shifts in tax emphasis and the increase, reduction, or elimination of existing taxes; researches other taxing jurisdictions, publications, and studies from educational institutions, think tanks, and advocacy organizations; attends seminars, conferences, hearings, and discussions with representatives from various industries and other States; tracks federal and State tax rate changes and the subsequent effects of those changes; provides information for responses to executive inquiries regarding New York State's tax structure and policies; assists in creating reports detailing new developments and initiatives in taxation; assists in the creation of applications to correct data on tax records using various software; researches, implements, and maintains software; and assists in developing data cubes and participates in verifying that they are accurate and complete.

Tax Policy Analyst 2: analyzes the immediate and long-term effects of various tax programs on the economic climate of the State, and recommends tax policy initiatives and alternatives; participates in special cross-functional teams conducting comprehensive research studies on the impact of federal legislation on the State's tax structure; prepares draft policy studies and mandated reports for use by the legislature in budget discussions; develops and analyzes research goals including the type of data to be gathered and timeline; develops difficult tax micro-simulation and econometric models to estimate the impact of enacted and proposed tax law changes in taxpayer behavior, tax revenue, and economic activity; examines alternate taxation methods and recommends revisions of the tax structure, including shifts in tax emphasis, or the

increase, reduction, and the elimination of existing taxes; presents recommendations and findings to higher level officials; serves as a resource for the Office of Counsel and other parties to assist in drafting legislative proposals resulting from recommendations; assists Department staff in the implementation of resulting legislative changes; responds to tax data inquiries from other State agencies, legislative staff, local public officials, businesses, and individuals; meets with various parties to discuss the usefulness and limitations of tax data; and develops informational documents and resources regarding new developments and initiatives in taxation.

Tax Policy Analyst 3: supervises Tax Policy Analysts 1 and 2; directs the analysis of the immediate and long-term effects of various tax programs on the economic climate of the State; recommends policy initiatives and alternatives to tax programs, and evaluates the potential impact of those various tax policy initiatives on the mission of the Department; leads special cross-functional teams in conducting comprehensive research studies on the impact of federal legislation on the State's tax structure; oversees the preparation of draft policy studies and mandated reports for use by the legislature in budget discussions; plans and oversees the development of all tax statistical research studies and ensures they are prepared in a timely manner; directs the development of all tax micro-simulation and econometric models to estimate the impact of enacted and proposed tax law changes and changes on taxpayer behavior, tax revenue, and economic activity; oversees the examination of alternate taxation methods and recommends revisions of the tax structure, including shifts in tax emphasis and the increase, reduction, or elimination of existing taxes; presents recommendations and findings to management and executive staff; assists Department staff in the implementation of tax policy legislative changes; oversees responses to tax data inquiries from other State agencies, legislative staff, local public officials, businesses, and individuals; meets with various parties to discuss the usefulness and limitations of the data; oversees the development of informational documents and resources regarding new developments and initiatives in the taxation field; represents the department in public forums, interagency task forces, and long-term research projects; and participates in department-wide workgroups and special projects as assigned.

Tax Policy Analyst 4: oversees a section, such as Personal Income Tax, Business Tax, or Real Property Tax and supervises Tax Policy Analysts 3; evaluates the State's current fiscal policy, with an emphasis on the State's revenue-generating policies and practices; directs the analysis of the effects of various taxes to determine their impact on revenue projections and the business climate of the State; directs the analysis of adjustments to the State's tax structure and recommends policy changes; evaluates the alternative revenue raising of tax relief programs and fiscal policies in implementing the tax and fiscal policies of the State; develops recommendations on proposed legislation relating to tax policy and the State's financial plan; assists with identifying and implementing new revenue generating programs; coordinates the research of technical issues related to the budget and the State's tax structure, and develops recommendations for executive leadership; recommends changes in estimating methodology, assumptions, data collection procedures, and methods of data analysis relating to the development of the State's financial plan; oversees the

development and evaluation of econometric models to produce accurate forecasting techniques and methodologies; and participates in negotiations with legislative staff on various aspects of the executive budget to reach agreements that are acceptable to the Governor and the Legislature.

Minimum Qualifications

Tax Policy Analyst 1

Non-Competitive: bachelor's degree and completion of a two-year traineeship; or a bachelor's degree and two years of experience conducting research, studying, or analyzing and interpreting policy issues; or an associate degree and four years of experience conducting research, evaluating, or analyzing and interpreting policy issues; or six years of experience conducting research, evaluating, or analyzing and interpreting policy issues. A J.D. or master's degree may substitute for one year of experience. A Ph.D. may substitute for two years of experience.

Tax Policy Analyst 2

Non-Competitive: bachelor's degree and three years of experience conducting research, studying, or analyzing and interpreting policy issues. One year of this experience must have been in the field of taxation or government finance. A J.D. or master's degree may substitute for one year of the general experience. A Ph.D. may substitute for two years of the general experience.

Tax Policy Analyst 3

Non-Competitive: bachelor's degree and five years of experience conducting research, studying, or analyzing and interpreting policy issues. One year of this experience must have been in the field of taxation or government finance and two years of the experience must have been at the supervisory level. A J.D. or master's degree may substitute for one year of the general experience. A Ph.D. may substitute for two years of the general experience.

Tax Policy Analyst 4

Non-Competitive: bachelor's degree and seven years of experience conducting research or data studies requiring the analysis and interpretation of government policy issues, and the preparation of written reports. Two years of this experience must have been in the field of taxation or government finance and two years of the experience must have been at a managerial level. A J.D. or master's degree may substitute for one year of the general experience. A Ph.D. may substitute for two years of the general experience.

Note: Classification Standards illustrate the nature, extent, and scope of duties and responsibilities of the classes they describe. Standards cannot and do not include all the work that might be appropriately performed by a class. The minimum qualifications above are those required for appointment at the time the Classification Standard was written. Please contact the Division of Staffing Services for current information on minimum requirements for appointment or examination.

Date: 3/2025

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