

Iowa Department of Administrative Services – Human Resources Enterprise  
Job Classification Description

## **Fiscal & Policy Analyst Principal**

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### **Definition**

Provides tax policy guidance and subject-matter expertise for one or more specific tax types; functions in a leadership capacity of enterprise level state accounting projects and processes performed by self-directed work team; performs related work as required.

*The work examples and competencies listed below are for illustrative purposes only and not intended to be the primary basis for position classification decisions.*

### **Work Examples**

Assists supervisor by performing such duties as instructing employees, answering questions, distributing and balancing the workload, and checking work; may make suggestions on selection, promotions, and reassignments.

Assists a supervisor by undertaking primary responsibility for the successful operation of self-directed work teams on enterprise level projects.

Performs accounting and financial systems analysis including electronic data processing applications for state and/or local budget and fiscal control operations.

Analyzes proposed legislation and policy revisions to assess impact and effect; recommends support, modification or withdrawal based upon the Governor's adopted program plans and financial policies; participates in legislative hearings.

Determines goals and develops plans for the ideal administration of compliance and audit programs for assigned tax type(s); coordinates efforts across the agency to establish compliance and audit standards and determine appropriate allocation of related staff resources; suggests improvements to management.

Oversees the development and updates to tax forms for the assigned tax type.

Analyzes and evaluates statutes to recommend technical changes to tax law; reviews relevant law changes and court ruling and provides feedback and education to management, other agencies, and the legislature on the impacts to Iowa's tax laws and their administration.

### **Competencies Required**

Knowledge:

- Administration and Management – Business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.
- Law and Government – Laws, legal codes, court procedures, precedents, government regulations, executive orders, agency rules, and the democratic political process.

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- Economics and Accounting – Economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data.
  - English Language – The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
  - Mathematics – Arithmetic, algebra, geometry, calculus, statistics, and their applications.

**Abilities:**

- Written Expression – Communicate information and ideas in writing so others will understand.
- Oral Expression – Communicate information and ideas in speaking so others will understand.
- Speech Clarity – Speak clearly so others can understand.
- Speech Recognition – Identify and understand the speech of another person.
- Deductive Reasoning – Apply general rules to specific problems to produce answers that make sense.

**Skills:**

- Active Listening – Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- Reading Comprehension – Understanding written sentences and paragraphs in work related documents.
- Critical Thinking – Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Speaking – Talking to others to convey information effectively.
- Mathematics – Using mathematics to solve problems.
- Systems Analysis – Determining how a system should work and how changes in conditions, operations, and the environment will affect outcomes.
- Management of Financial Resources – Determining how money will be spent to get the work done, and accounting for these expenditures.
- Monitoring – Monitoring/Assessing performance of yourself, other individuals, or organizations to make improvements or take corrective action.
- Active Learning – Understanding the implications of new information for both current and future problem-solving and decision-making.
- Judgment and Decision Making – Considering the relative costs and benefits of potential actions to choose the most appropriate one.
- Complex Problem Solving – Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.

**Minimum Qualification Requirements**

Applicants must meet at least one of the following minimum requirements to qualify for positions in this job classification:

- 1) Eight years of full-time professional-level work experience in budget analysis, financial management, accounting, law, or management analysis work.
- 2) All of the following (a, b, and c):
  - a. Two years of full-time professional-level work experience in budget analysis, financial management, accounting, law, or management analysis work; and
  - b. A total of four years of education and/or full-time experience (as described in part a), where thirty semester hours of accredited college or university course work in any field equals one year of full-time experience; and
  - c. A total of two years of graduate-level education and/or full-time experience (as described in part a), where twenty-four semester hours of accredited graduate college or university course work in public or business administration, law, economics, finance, or accounting equals one year of full-time experience.

*Effective date: 03/24 SA*