Iowa Department of Administrative Services – Human Resources Enterprise
Classification Series Guidelines

Fiscal & Policy Analyst Series

Classes in the Series

Class Code	Class Title
00720/90720	Fiscal & Policy Analyst
00719/90719	Fiscal & Policy Analyst Senior
00728	Fiscal & Policy Analyst Principal

Series Concept

Position incumbents whose positions are classified in this series are responsible for researching, analyzing, and forecasting the financial impact of tax law/policy changes on state revenues (Department of Revenue) and administration of the statewide accounting system (Department of Administrative Services – State Accounting Enterprise). Use of this classification series is limited to these departments.

Exclusions

Position incumbents that perform the full range of supervisory duties should be classified in the appropriate supervisory class, while those that perform professional accounting, budgeting, management analysis, and program planning duties, but do not meet the concept of the Fiscal & Policy Analyst series, should be classified in the appropriate Accountant, Budget Analyst, Management Analyst, or Program Planner series.

Positions in the Department of Management performing enterprise-wide financial analysis, planning and program evaluation, management analysis, and budgeting work should be classified in the Enterprise Fiscal Analyst series.

Class Distinctions

Fiscal & Policy Analyst

Position incumbents at this level perform trainee to journey level work in the analysis of financial issues relating to the planning and evaluation of tax legislation/policy (Department of Revenue) and their impact on budget resources. Revenue employees compile tax statistics, evaluate tax expenditures, and provide revenue data to the Revenue Estimating Conference. Department of Administrative Services employees assist in the preparation the State's "Comprehensive Annual Financial Report" and perform financial analysis/reporting for the various branches of government.

Fiscal & Policy Analyst Senior

At this level in the Department of Revenue, employees forecast receipts, refunds, and tax credits for the Revenue Estimating Conference using models that reflect the relationship between historical changes in the Iowa economy, national economy, Iowa tax law, and federal tax law. They develop and maintain models used to forecast tax liabilities and to analyze proposed tax law changes. Employees also author evaluation studies of tax credits and other economic policy questions.

In addition to assisting with the State's "Annual Comprehensive Financial Report", employees of the Department of Administrative Services analyze/implement generally accepted accounting principles

(GAAP) in State departments/other branches of government. They also analyze data/information related to the State's obligation, financing, and federal reporting requirements.

Fiscal & Policy Analyst Principal

Positions at this level in the Department of Administrative Services are distinguished from others in the series by being designated as a lead worker over lower-level Fiscal & Policy Analyst positions.

Department of Revenue employees provide tax policy guidance as the designated principal subject-matter expert in one or more specific tax types (i.e., individual income tax, corporate and franchise tax, pass throughs, and sales and excise tax). They work with senior department management to set goals and develop plans for the ideal administration of compliance and audit programs for the tax type(s), and coordinate those efforts throughout the agency. They also evaluate statutes to recommend technical changes to law, and provide review and feedback of relevant law changes/rulings and the impacts on Iowa's tax laws.

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