



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
10/25/24

This position is:

- Classified
Unclassified
Executive Service
Mgmt. Svc – Supervisory
Mgmt. Svc – Managerial
Mgmt. Svc - Confidential

Agency: Department of Revenue

Facility: Revenue Building - Salem

New Revised

SECTION 1. POSITION INFORMATION

a. Classification Title: Administrative Specialist 1
b. Classification No: C0107
c. Working Title: Research Assistant
d. PPDB No/WD ID: 2367000
e. Section Title: Research
f. Agency No: 15000
g. Employee Name:
h. Budget Auth No: 533710
i. Supervisor Name: Timothy Fitzgerald
j. Repr. Code: OAS
k. Work Location (City – County): Salem, OR – Marion County

I. Position: Permanent Seasonal Limited Duration Academic Year
Full-Time Part-Time Intermittent Job Share

m. FLSA: Exempt Non-Exempt
If Exempt: Executive/Supervisory Administrative Professional Computer
n. Eligible for Overtime: Yes No

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

Our mission, vision, and values guide us as we serve our customers and collect revenue that supports the critical infrastructure of Oregonians' daily lives. The Department of Revenue's mission is, "together, we collect the revenue that Oregon counts on." The agency's vision is to create a clear and easy experience for our customers.

Our Values are:

- We work to earn the trust of taxpayers.
We seek dignity and inclusion for all.
We do the right thing.
We build partnerships.
We rise to the occasion.

State of Oregon DEI Vision, Values, and Goals

Vision

Within this context of historical harms, changing demographics, intersectional identities, and more; our vision for the next five years and beyond is to:

- Dismantle institutional and structural racism in Oregon state government, and by doing so, have resounding impacts on the communities of our great state.
- Build a more equitable Oregon where everyone has the opportunity to thrive and everyone's voice is heard.
- Ensure an inclusive and welcoming Oregon for all by celebrating our collective diversity of race, ethnicity, culture, color, disability, gender, gender identity, marital status, national origin, age, religion, sex, sexual orientation, socio-economic status, veteran status, and immigration status.

Values

- Putting racial equity at the forefront while understanding intersectionality. We must be bold and put racial equity at the forefront as a primary and pervasive location of oppression that connects with and worsens other identity-based inequities.
- Prioritize equity, anti-racism, and racial justice actions. Commitment to prioritizing equity and eliminating racial disparities involves taking action in our policies, budgets, decision-making, and daily work.
- Foster internal and external partnerships. Across the state enterprise and other institutions, community-based organizations are crucial to achieving racial equity. True partnership means shared power, listening, resolving tensions by creating solutions together, and scaling up what already works well.
- Ensure collective responsibility and accountability. As public servants, we have a collective responsibility at every level of government to proactively reduce racial disparities and barriers. We must establish measurements of success so that we can ensure improvements are real and ongoing.

Goals

1. Establish strong leadership to eradicate racial and other forms of disparities in all aspects of state government.
2. Center equity in budgeting, planning, procurement, and policymaking.
3. Strengthen public involvement through transformational community engagement, access to information, and decision-making opportunities.
4. Improve equitable access to services, programs, and resources including education, health, housing, human services, environmental justice, criminal justice, and economic opportunities.
5. Foster an inclusive workplace culture and promote equitable hiring, retention, and promotion practices

The Research Section develops statistical information on tax programs and serves as a consulting unit to the Director and Governor on statistics/economics issues related to taxation. Specific functions of this section include:

- 1) Monitors and reviews department programs and maintains an awareness of tax laws and potential changes to anticipate information needs for revenue data;
- 2) Maintains liaison with other agencies and governmental bodies to ensure that data or revenue related statistical information is available or can be provided as needed;
- 3) Designs and constructs research databases for personal income tax, corporate income tax, property tax, and tax collections;
- 4) Performs research/analysis of regional, statewide and local social economic data as part of special studies and economic forecasting related to revenue;
- 5) Performs statistical analysis of existing or proposed tax laws to determine their impact on revenues and to provide published statistical summaries of tax data for public release; and

6) Advises the Director, Governor, Secretary of State, State Treasurer, and the Executive Department on the impact of ballot measures on the General Fund.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

Support the Section by performing various duties that enable the economists and research analysts to focus on their responsibilities involving data base construction, publication of statistical reports, and research projects. These duties include coordination of the provision of information in annual statistical publications, the Tax Expenditure Report, and others; maintenance of system documentation, project work papers, etc.; assignment of NAICS codes to business taxpayers, development of regular reports for internal and external use; and responsibility of research reference material, including maintenance of the research library, location of appropriate literature as needed, and other tools. This position responds to certain requests for information about DOR’s tax programs.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark “N” for new duties, “R” for revised duties or “NC” for no change in duties. Indicate whether the duty is an “Essential” (E) or “Non-Essential” (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
30	NC	E	<p>Coordinate the Research Section’s response to surveys, formal requests for information, and regular reporting of data, such as the annual District of Columbia Tax Burden Study, Bureau of the Census, Department of Administrative Services, and Federation of Tax Administrators, and others.</p> <p>Coordinate the efficient flow of information between the Department of Revenue and numerous agencies required for the construction of the biennial Tax Expenditure Report. Ensure that deadlines for analysis and review have been met and that DOR has provided all necessary information.</p> <p>Coordinate the efficient flow of information between the Department of Revenue and counties relating to the annual collection of property tax reposting from counties. Provide counties with templates and instructions for providing annual data. Track the amount and quality of information received and unresolved data issues.</p> <p>Assist with maintaining NAICS codes and tax program reporting by Industry.</p> <p>Maintain certain data sources of DOR data such as historical receipts data using SAS and Microsoft Excel.</p>
25	NC	E	<p>Edit, proof, and arrange material for printing and distribution of the section’s annual statistical publications, Tax Expenditure Report, and other research reports. Integrate text and graphics for publications and perform other formatting tasks using tools including Microsoft Office and Adobe Acrobat Pro and Adobe Creative Suite products. Arrange for the printing and mailing of section publications.</p>
20	NC	E	<p>Location academic and other literature needed by section economists and develop an understanding of the section’s needed for research materials, including reference books, software, federal, state, and local data sources, and legislative information. Build specialized collection of research materials and information resources by reviewing, evaluation, and selecting</p>

			resources. Seek and suggest literature of potential value of Section analysts. Maintain the research library. Assist economists with compiling and arranging information needed to satisfy information requests. Answer questions and explain information about the state's public finance system using existing section or department publications.
15%	NC	E	Confer with section economists and coordinate the building and maintenance of section work files, correspondence files, and documentation of section projects. Similarly, build and maintain documentation of section data and systems, including Oregon property tax, income tax, corporation data files and IRS individual and business data and models. Organize work papers and system documentation in both paper and electronic forms to that the work can be retrieved, understood, and replicated where necessary.
5%	NC	NE	Miscellaneous office support
15%	NC	E	Other duties as assigned

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

May be required to work overtime to ensure project completion under difficult deadlines. Requires high level of concentration for extended periods while using a computer.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

- NAICS classification system
- Oregon and Federal laws and administrative rules, IRS regulations.
- Standard data bases for locating academic literature.

b. How are these guidelines used?

To develop and maintain legislative history and research background material.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
Legislative Revenue Office	Phone/email/in person	To provide or retrieve information	Monthly
Executive Dept. Office of Economic Analysis	Phone/email/in person	To provide or retrieve information	Monthly
Federal Agencies	Phone/email	To provide or retrieve information	Monthly
Other DOR employees	Phone/email/in person	Technical questions	Daily
Other State Agencies	Phone/email/in person	To provide or retrieve information	Weekly
County Governments	Phone/email/in person	To provide or retrieve information	Annually
General public	Phone/email/in person	Data requests/questions	Weekly
Legislature	Phone/email/in person	To provide information	Once/ Twice year

Academic researchers	Phone/email/in person	Technical questions	3-4 time a year
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Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

The employee decides how to improve the appearance and readability of section materials, including the appropriate integration of graphics and text. The employee decides which research materials and information sources to acquire or update to support the work of the section economists. The employee makes judgements about the business activities of taxpayers to assign the correct NAICS assignments. This employee decides how best to solicit and provide information and the most appropriate form and content of responses to requests for information about tax programs. This person decides how to organize materials relating to projects or data systems that will allow clear understanding of the work, outcomes, and context.

Correct decisions enhance the timeliness and quality of information developed and communicated by the section, which provides better understanding of Oregon's public finance system. Unclear, delayed, or unreliable information may affect the credibility of the department and Oregon's public finance system and could lead to misinterpretation about Oregon's tax system. Correct decisions regarding documentation and research materials and NAICS enable the research staff to be more effective in performing their responsibilities, which, in turn, enhances the quality of information developed by the section.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Research Director, RASM 3	2315000	In-person, on the phone, or virtually, and through Workday	weekly, as needed, and quarterly as required	Collaborative, ongoing coaching and performance feedback

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

- a. How many employees are directly supervised by this position? 0
 How many employees are supervised through a subordinate supervisor? 0

b. Which of the following activities does this position do?

- | | |
|--|---|
| <input type="checkbox"/> Plan work | <input type="checkbox"/> Coordinates schedules |
| <input type="checkbox"/> Assigns work | <input type="checkbox"/> Hires and discharges |
| <input type="checkbox"/> Approves work | <input type="checkbox"/> Recommends hiring |
| <input type="checkbox"/> Responds to grievances | <input type="checkbox"/> Gives input for performance evaluations |
| <input type="checkbox"/> Disciplines and rewards | <input type="checkbox"/> Prepares & signs performance evaluations |

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

This position requires a basic understanding of the responsibilities and resources used by the section economists and specialized knowledge of the Oregon Department of Revenue’s public finance system and related DOR information.

Requires advanced elements with Microsoft Office and Adobe Pro and Creative Suite, ability to run SAS software quite queries, proficiency with the North American Industrial Classification System, and knowledge of reporting functions in GenTax.

MUST COMPLY WITH LAWS AND AGENCY POLICIES ON OREGON'S TAX FILING REQUIREMENTS, AND LAWS PROHIBITING DISCLOSURE OR MISUSE OF CONFIDENTIAL INFORMATION

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Operating Area	Biennial Amount (\$00000.00)	Fund Type
<i>Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".</i>		

SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature

Date

Supervisor Signature

Date

Appointing Authority Signature

Date