

BUSINESS AND INCOME TAXES DIVISION MANAGEMENT ANALYST ROLE

Role Summary

The Management Analyst Role may consist of one grade level (16). The incumbent is responsible and accountable for development, implementation, and successful outcome of multiple projects within the division. This involves: design and development of assigned programs and projects; documenting, tracking, and assisting in the resolution of operational issues; identification of tactical and strategic issues; quantifying the estimated cost and time requirements; development of reporting system and methods; statistical and economic analysis of compliance activities and programs; review and recommendation for allocating resources; and quality assurance.

The incumbent will provide technical and administrative expertise on functions necessary to ensure the consistent quality and effectiveness of the work of the division. Incumbent will be assigned special studies and/or projects effecting the division and will assist in legislative issues, policies, procedures, rules, laws, and practices. Primary internal contacts are with division administrator, bureau chiefs, unit managers, legal staff, information technology staff, and other department staff. External contacts may include Governor's Office, Legislative Services Division, legislators, city/county officials, taxpayers, and state and national organizations such as Federation of Tax Administrators, Multistate Tax Commission, and Montana Association of Counties.

Working Conditions

Periods of high stress, often for long lengths of a time, due to working under pressure of critical projects with statutory deadlines, managing a heavy workload, the technical nature of the work, dealing with confidential or sensitive material, and the significance of decisions made. Work hours may exceed 40 hours per week. Minimal travel may be required some which will be out-of-state.

Education and Experience

- Competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to a bachelor's degree in business management, finance, mathematics, economics or statistics and five years of experience in program management. Project management and technical research experience is desired. Other combinations of education and experience will be evaluated on an individual basis.

Department Core Competencies

In addition to the role specific competencies, there are four, department core competencies that all employees are expected to successfully achieve. These are:

- *Interpersonal Skills*: Builds constructive and effective relationships with internal and external customers and is committed to meeting customer needs in a timely and accurate manner. Listens actively and attentively and demonstrates an appreciation of other perspectives. Builds the appropriate rapport required to do business. Openly demonstrates an understanding of and respect for the value of co-workers' contributions to the department mission.

- *Decision-Making and Accountability:* Considers the department's vision, mission, and values in making decisions and taking actions. Identifies and considers possible alternatives before making decisions. Bases decisions on achieving desired outcomes pursuant to the departmental business plan or management direction. Uses a combination of analysis, experience, and sound judgment that results in fairness and consistency, while being accountable for actions. When serious ethical issues are at stake, takes all necessary actions.
- *Commitment to Continuous Improvement:* Ability and willingness to continually seek greater efficiency in agency programs, is results driven, and meets changing requirements in work or direction. Adapts to changing conditions and work responsibilities. Accepts constructive criticism and suggestions and uses them to improve performance.
- *Personal and Work Ethics:* Creates own measures of excellence, and practices what he/she promotes. Sets goals that provide challenges and measures goal attainment regularly. Displays a contagious optimism about the work to be done. Goes beyond traditional ways to address issues despite obstacles or resistance. Is able to generate ideas, fresh perspectives, and original approaches and engages in open-minded thinking. Employs strategies to promote ideas and proposals to increase probability of acceptance. Mentors others to improve the performance necessary to achieve success. Reflects a belief that the results achieved are a direct result of his/her personal decisions and actions.

Grade Levels

Each grade level lists the essential duties that describe work performed 50 percent or more of the time (predominant work). Established work plans and specific assignments identify daily tasks.

Grade 16

Predominant/Essential Duties

Project Management and Analysis

- Review, develop, implement, and revise project implementation plans, operations, goals, and strategies.
 - Work in conjunction with administrator, bureau chiefs and unit managers to implement division changes.
 - Identify resource needs of the division and recommend adjustments in resource allocations.
 - Analyze efficiency and operation of all program functions.
 - Review and recommend operational policies and long-range strategic goals and objectives for the division's programs.
 - Design and implement organizational and operational changes necessary for program operations.
 - Review and assist in ensuring efficient development and operation of all program functions.
 - Assist administrator, bureau chiefs and unit managers to ensure that operational deadlines and process measures/goals are determined and met.
 - Advise leadership on policy and procedures for efficient development and operation of the division.

- Work extensively with division and department leadership on assigned projects.
 - Develop, prepare, and present project updates to division leadership.
 - Project liaison for internal/external customers.
 - Serve as a member of a project management team.
 - Provide project leadership to assigned staff and specific projects.
 - Develop, prepare, and monitor project status reporting, including schedules, cost, and issues.
 - Responsible for quantifying the estimated cost and time requirements of the work.
 - Accountable for project outcome and responsible for project quality assurance.
- Review and development of performance standards.
 - Review and establish performance measures for each division program to determine each program's effectiveness and efficiency.
 - Ability to apply management principles and use organizational skills in analyzing specific organizational issues.
 - Responsible for recommending, developing and implementing procedures and standards. This includes the coordination and development of uniform audit, appraisal and operational procedure manuals.
 - Ensure work is performed within industry and agency standards
- Conduct division research and analysis.
 - Provide analysis of the impacts of any comprehensive tax proposals and legislation, including analysis of relationship between guiding principles of taxation and strategic revenue policies as the proposals relate to the division.
 - Coordinate and provide the fiscal impact and administrative costs of proposed legislation (fiscal notes).
 - Effectively search and use Montana Code Annotated (MCA) and Administrative Rules of Montana (ARM).
 - Work with administrator, bureau chiefs, unit managers and legal staff in interpreting the laws, rules, and procedures to develop effective and efficient compliance initiatives.
 - Work is performed with minimal guidance and within broad guidelines.

Stakeholder Relationships

- Advanced communication skills are critical to this role. Contacts involve negotiation and conclusions of issues which can range from cooperative to hostile situations.
 - Primary contact with internal/external customers to ensure consistent responses to assigned area or projects. This includes interaction with internal and external stakeholders. This interaction includes:
 - Testify before legislative committees and administrative rule hearings.
 - Prepare and present papers at legislative hearings and interim committees.
 - Communicating status of assignments to stakeholders.
 - Development of information releases including; press releases, informational brochures, web updates, and DOR training information.

Competencies and Degrees of Proficiency

The Competency/Proficiency Chart identifies the role specific competencies, degrees of proficiency, and guidance required for each grade level. Role specific competencies describe the knowledge, skills, and abilities required to perform the essential duties. The degrees of proficiency indicate the difficulty and/or complexity level of the tasks and assignments.

Competency/Proficiency Chart – BITD Management Analyst Role

Competencies	Grade 16 Independently
Proactively focus efforts and energy on successfully attaining goals and objectives, assuming accountability for decisions, action and results. Follow issues through to completion.	D
Demonstrated ability to think creatively and recommend innovative solutions.	E
Demonstrated understanding of the organization’s mission, vision, and goals to help influence and shape the decisions of management.	D
Demonstrated knowledge of specific revenue sources and market trends.	D
Demonstrated ability to provide timely and effective written, oral, and interpersonal communication.	D
Demonstrated skill and ability to analyze and resolve unique and highly technical issues.	E
Demonstrated knowledge of taxation and the relationship of each tax type within the organization.	D
Demonstrated knowledge and skill of word processing, spreadsheet, database, and software applications/programs relative to the role. This includes the department’s Integrated Revenue Information System (IRIS)	D
Demonstrated knowledge and ability of department business processes and ability to apply that knowledge effectively.	D
Demonstrated knowledge and effective application of federal/state statutes, administrative rules, and state policies and procedures.	D
Demonstrated skill and ability to identify and allocate resources.	D
Demonstrated knowledge and ability in conflict resolution techniques relative to the role.	D
Demonstrated ability to analyze operations and apply theoretical knowledge of management principles.	C
Demonstrated skill and ability to build long-term internal and external relationships with customers critical to the organization.	D

Degree of Proficiency

A: A degree of knowledge, skill, or ability commensurate with elementary-level tasks and assignments.

B: A degree of knowledge, skill, or ability commensurate with intermediate-level tasks and assignments.

C: A degree of knowledge, skill, or ability commensurate with advanced-level tasks and assignments.

D: An advanced degree of knowledge, skill, or ability commensurate with considerable experience and the application of the competency to non-standard tasks and assignments.

E: The most advanced degree of knowledge, skill, or ability, evidencing complete mastery and understanding of the subject.