**TITLE: UTILITY ANALYST**

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| **Department:** | Asset Management &   Finance | **Travel**   **Required:** | Some travel in Southwestern U.S. |
| **Location:** | Glendora, CA 91740 |

**DEFINITION**

Under general direction, the Utility Analyst is responsible for monitoring utility projects for contract compliance and budget reconciliation for the Southern California Public Power Authority’s (SCPPA) current operating projects, including traditional and renewable generation, transmission, and natural gas reserves projects. Duties also include assisting in the creation of annual project and administrative budgets totaling almost $1 billion, onboarding new projects, and ongoing management of operating projects. Additional duties include creating and managing budget reports, performing financial analysis, and supporting special projects in the Finance, Assets, Programs, and Project Development Departments.

**DISTINGUISHING CHARACTERISTICS**

The Utility Analyst position is a professional level classification and individual contributor. The position reports to the Senior Asset Manager while providing significant support to the Finance and Legal Departments as well as SCPPA working groups.

**DUTIES AND RESPONSIBILITIES**

The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.

* Identify and resolve contract, budget and performance issues with the various companies and agencies involved with current projects.
* Coordinate with Legal to identify and resolve contract and related legal issues in current projects.
* Provide functional support to the SCPPA working groups and committees, including Renewable Energy, Natural Gas, Assistant General Managers, and Asset Management Working Groups along with the Finance Committee.
* Serve as alternate representative for SCPPA in operating and management committees for joint participation projects as well as natural gas reserves and communications working groups.
* Assist with annual administrative and project budget creation and prepare quarterly reports comparing actual expenditures to budgets.
* Prepare and provide updated reports for project credit support facilities.
* Organize files of all project information to allow Members and SCPPA staff to access project records and documents.
* Participate in natural gas trading activities as needed.
* Assist with the negotiation, evaluation and approval of service contracts, and supervise consultants and vendors in the achievement of requested tasks.
* Perform settlement checkout and invoicing for natural gas trades.
* Coordinate between SCPPA Accounting, SCPPA LA, and Project Participants.
* Coordinate between SCPPA Project Participants and project operators.
* Develop written and oral reports describing the status of projects, both operational and financial.
* WREGIS accounting of Renewable Energy Credits generated by SCPPA projects for SCPPA members.

**EMPLOYMENT STANDARDS**    
**Knowledge of:**

* Electric utility industry operations, including generation, transmission, and distribution systems.
* Utility project accounting including billing, collection, rates, debt servicing, bond funding, purchasing and treasury.
* Utility project contracts including performance guarantees, penalty sections, expiration date issues, re-negotiations and new regulations that impact an existing contract.
* Specific issues in each form of power including all forms of renewables including solar, wind, geothermal, as well as natural gas, coal, hydro-electric and nuclear.
* Power purchase agreements to interpret the specific financial or technical issues that arise during the term of an agreement that need to be resolved.
* CAISO market scheduling and settlements.
* Principles of budget and financial analysis and tracking actual expenditures against plan.
* Microsoft Excel, Word, Power Point and modern information and financial analysis systems.

**Ability to:**

Manage priorities to ensure the most critical project issues are responded to in a timely manner.

* Communicate effectively in writing and orally to all parties involved in the management of SCPPA projects.
* Conduct critical thinking and offer credible solutions. Analyze complex data.
* Implement the most current methods of project accounting including third party payments and debt financing.
* Conduct an on-site review of a project to observe issues in dispute and clarify the contractual obligation of any party to the current agreement.
* Read and understand contracts and service agreements.
* Explain complex issues in written form that are understandable to affected parties.
* Use accounting software and Excel, Word and PowerPoint.
* Work independently and in groups.
* Establish and maintain effective working relationships.
* Follow directions and manage time.
* Display enthusiasm for new and diverse tasks, including learning new skills and working in cross-functional areas beyond day-to-day responsibilities.

**ANALYST CLASSIFICATION SPECIFICATION:**

**Utility Analyst;**

This is an entry level class in the Utility Analyst series.

The distinguishing feature of this Classification is the lesser degree of independent discretion and lesser complexity of duties. The incumbent may have limited or no directly related work experience.

Under direct supervision, the Utility Analyst will be learning and executing SCPPA processes for procurement, contract development/ negotiation, budgeting, reporting, dispute resolution, and contract and task order management.  The incumbent will perform more routine tasks and assisting in various projects covering a range of issues.

The incumbent’s work will be closely reviewed by his/her supervisor for accuracy.   Supervisor will review any errors identified with the incumbent and provide frequent feedback on performance. The incumbent is allowed some latitude in managing and completing ongoing projects/assignments.  Assignments and objectives are set for the employee.  Incumbent is able to follow established work methods and procedures.

Advancement to the next level is based on demonstrated proficiency in performing the full range of duties and is at the discretion of the management and Executive Director.

**Senior Utility Analyst:**

This is the journey level class in the Utility Analyst series.  Senior Utility Analyst is generally filled by advancement from Utility Analyst, or when filled from the outside require prior related experience.

The distinguishing feature of this Classification is the greater complexity of assignments received and the greater independence with which an incumbent is expected to operate.

The Senior Utility Analyst would require demonstrating proficiency in executing work assignments and duties with minimal supervision and errors and demonstrating knowledge of all SCPPA policies and procedures.

The incumbent will have a high degree of responsibility for conducting complex research and analysis and providing recommendations to management for consideration.

Advancement to the next level is based on demonstrated proficiency in performing the full range of duties and is at the discretion of the management and Executive Director.

**Principal Utility Analyst:**

This is the advanced journey level class in the Utility Analyst series.  Principal Utility Analyst is generally filled by advancement from Senior Utility Analyst, or when filled from the outside require prior related experience.

The distinguishing feature of this Classification is the most technical and difficult assignments received and a high degree of independent judgement in decision making.

The Principal Utility Analyst would have the advanced knowledge and technical proficiency to identify and lead initiatives to develop projects and programs and to improve SCPPA processes.  The incumbent will have the highest degree of responsibility for conducting complex and comprehensive research and analysis and providing sound recommendations to management and Members for consideration. The incumbent is becoming an expert in his/her area of assignment and can help advise Members on compliance, reporting, and/or strategy development.  The incumbent has full knowledge of all SCPPA policies, procedures, and practices related to assigned area of responsibility.  The incumbent is expected to lead, attend, and participate in professional group meetings; maintain awareness of new trends and developments within the electric utility industry and incorporate new developments as appropriate.   Incumbent can serve as acting manager when assigned.

**MINIMUM QUALIFICATIONS**

**Education, Training and Experience:**

A Bachelor’s degree in engineering, finance, economics, public administration, or other relevant major is required with minimum years of experience in an operating utility or similar organization for each classification series, as shown below. Experience in a publicly owned utility or joint powers authority; general knowledge of engineering principles, accounting practices, and contracts; and familiarity with types of electric generation and transmission is preferred.  Advanced degree may be substituted for up to one year of experience for the Utility Analyst level.

Utility Analyst:  Minimum two (2) years of analytical experience.

Senior Utility Analyst:  Minimum four (4) years of progressively responsible analytical experience or two (2) years in the Utility Analyst classification.

Principal Utility Analyst:  Minimum six (6) years of progressively responsible analytical experience or two (2) years in the Senior Utility Analyst classification.

**LICENSES AND CERTIFICATES**

A valid State driver’s license is required at the time of appointment and must be maintained throughout employment.

**PHYSICAL AND MENTAL DEMANDS**

The physical and mental demands described below are representative of those that must be met by incumbents to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Physical Demands:**

While performing the duties of this class, the incumbent is regularly required to be stationary and move about to access files and office machinery; converse and exchange information; and handle, feel or operate objects, tools or controls repetitively.

Specific vision abilities required for this class include close vision and the ability to adjust focus.

**Mental Demands:**

While performing the duties of this class, the incumbent uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work, including periodic contact with SCPPA staff or external representatives who may be dissatisfied with a decision.

**Work Environment:**

The incumbent works in an office environment where the noise level is usually quiet. Certain

positions within the classification may require availability to work flexible schedule.

\*Adopted: 00-00-00

\*Revised: 05-14-18

\*Revised: 04-18-24

\*Job Family: Professional