



UTILITY AND ENERGY ANALYST 3

1157

GENERAL DESCRIPTION OF CLASS

The UTILITY AND ENERGY ANALYST 3 is a technical expert or interdisciplinary specialist and works in support of a State program directly related to utility or energy facility regulation. The Utility and Energy Analyst 3 conducts the most complex research studies, policy analysis or compliance investigations and inspections to develop short- and long-term regulatory policies, remedial action or solve difficult utility or energy regulatory problems. Work performed at this level is often controversial and contentious in nature and often covers several regulatory issues. The Utility and Energy Analyst 3 frequently leads an interdisciplinary team of analysts and handles projects that are controversial, sensitive or have significant financial impact.

DISTINGUISHING FEATURES

This classification is the third level of a three-level series. The Utility Analyst 3 has the authority to establish procedures and deviate from those to conduct studies and handle issues with significant potential impact on the public or consumers. The Utility and Energy Analyst 3 leads interdisciplinary project teams and coordinates organizational-wide projects. They make recommendations and write rules and policies that require the synthesis of highly complex analyses and often influence statewide policies. They act as consultants or expert resources for supervisors, peers and subordinates.

The Utility and Energy Analyst 3 has greater freedom to identify and define issues and conduct independent studies than the next lower level. Employees in this class develop recommendations and policies that have more substantial policy implications and more significant financial impact than those developed by the lower level analysts and conduct studies that are more controversial, sensitive or complex.

DUTIES AND RESPONSIBILITIES

The duties listed below are not inclusive but characteristic of the type and level of work associated with this class. Individual positions may be assigned all or some combination of the duties listed below and other related duties.

1. Project Leadership

Plans, prioritizes, and assigns some segments of a project to other analysts. Directs and coordinates the activities of teams of analysts, including those from other divisions within the Office or Commission, who are assigned to utility or energy operations appraisals, system failure investigations, rate cases, environmental analysis, and other projects. Reviews the work of team members and/or contractors for accuracy, completeness, and consistency with agency and State policies and summarizes the findings and recommendations of team members into a single report or testimony. May be responsible for policy proposals on significant utility or energy issues such as environmental impact analysis, rate of return analysis, sales forecasts utility investment activities, natural gas and electric safety and telecommunications service standards.

2. Management Consultation

Consults with utility or industry management in areas relating to regulatory issues concerning the regulated industries (e.g., resources planning, environmental review, rate design, industry competition, organization structure, financing, affiliated interest ventures, etc.) or to utility or public safety, service reliability and operational effectiveness (e.g., utility and energy technology, industry standard practices, future systems planning, Construction, operation and maintenance of facilities, etc.)

3. Studies/Analysis

Independently, evaluates the planning, design, construction, operation and maintenance of large utility or energy systems. Reviews designs, directs tests, analyzes records and field inspects utility or energy facilities for safety, quality control and reliability deficiencies. Reviews company standard procedures, inspection reports, system failure information and project cost estimates to ensure compliance with safety codes, state regulations and prudent industry practice. Recommends corrective action. Consults with utility or energy industry managers and agency management on operation issues. Negotiates settlements on disputed issues with industry officials.

Evaluates economic, financial, scientific, accounting, and engineering studies submitted by utilities or developers for reasonable methods and assumptions. Independently analyzes utility rates and facility operations. Typical studies include assessing the propriety of utility expenditures and plans for capital investments such as power plants and/or telecommunications equipment, environmental impacts, organization capabilities and socio-economic impacts for facilities, determining the financial requirements and capabilities of a utility or developer, estimating demand for utility services, determining the allocation of costs between a utility and its unregulated affiliates or between regulatory jurisdictions, and developing rate structures for regulated services or designing and monitoring operating/administrative structures for companies authorized by the State, using public purpose funds, to provide energy efficiency services.

4. Expert Testimony

Serves as an expert witness and policy advisor in docketed cases, court cases, legislative hearings and other proceedings on such issues as energy facility siting or utility industry structure. Presents findings and recommendations and formal testimony, defending technical accuracy of data and conclusions. Works with the Attorney General's office to clarify case issues, develop cross-examination or completion review questions for utility and intervenor experts or applicants, and participates in preparing legal briefs used in contested case proceedings.

5. Policy Development

Researches utility and/or energy issues and regulatory policies. Proposes policies and rules to address issues raised by institutional and technological changes in regulated industries (e.g., changes in Federal regulation, national codes and industry standards or increases in competition to provide regulated services). Monitors activity and recommends agency participation and policy in Federal actions and other government proceedings affecting Oregon. Develops rules and policies to reduce case-by-case review of recurring issues. Prepares formal recommendations through staff reports and/or Public Meeting memoranda and presents these recommendations to the Commission, Office, or Council at public meetings.

Meets with local public officials, agency heads, legislators, and legislative committees on utility and facility safety, technology and operational issues or those involving long and short-range energy and telecommunications policies.

6. Laws, Rules and Policy Interpretation

Responds to inquiries from the public, the utility or energy industry, and agency management and staff, interpreting and applying existing laws, contracts, rules, and policies of a variety of functional areas. Recommends solutions that may establish precedents and affect the utility or energy industry, customers, and stockholders. Analyzes proposed laws, negotiated agreements, rules, and policies and recommends changes or acceptance. Interprets legislative intent and develops rules and policies to carry out that intent. Sets standards for applying policy interpretation. Keeps up to date on changing case law, court standards, national codes and industry standards.

7. Miscellaneous

Writes rules, policies, reports, position papers and correspondence on investigative findings, analyses, and recommendations for Commission or Council action. Plans and presents informational programs to utility or energy company personnel, legislative committees, and the general public. Answers questions and defends technical accuracy of data and findings.

RELATIONSHIPS WITH OTHERS

The Utility and Energy Analyst 3 has daily contact by telephone, letter, or in person with professional engineers and consultants to interpret regulatory policy. There is regular contact with companies to exchange information, with other governmental agencies to discuss policy, procedures and technical issues or to exchange information and with the public to interpret or explain regulations and resolve disputes. There is frequent contact with the Attorney General's office to discuss regulatory policy, testimony or legal issues. The Utility and Energy Analyst 3 has contact with other agency management and legislators to advise and review policy issues.

SUPERVISION RECEIVED

The Utility and Energy Analyst 3 works under the general guidance of an administrative superior who provides leadership and policy direction. Work is reviewed on a consultation basis to ensure work is achieving agency goals and conforms to policy.

KNOWLEDGE AND SKILLS (KS)**Extensive knowledge of:**

Analytical techniques.
Research and statistical methods.
Information sources.

Skill to:

Plan, organize, and complete complex studies and analyses within an identified time frame.
Write clear and concise technical reports.
Make oral presentations on technical or scientific subjects.
Interpret State and Federal laws regulating public utilities or energy companies and apply them to specific situations.
Develop effective working relationships with public utility or industry officials in an adversarial context.
Manage long-term program and project management.

Every position will require at least some of the following:**Extensive knowledge of:**

Theory and application of operations research, economics, finance, statistics, science, public administration, law, or communications.
Technical or scientific aspects of utility or energy facility planning, design, construction, operations and maintenance.
Principles and theories of electrical, mechanical, or civil engineering.
Utility safety codes and utility or energy facility industry standards.
Technical aspects of utility design, installations, operations, and maintenance.
Principles of natural gas pipeline or electric transmission line design and operation.
Accounting principles and methods.

Skill in:

The use of computers.
The advanced techniques of econometric modeling.
Analyzing general accounting practices and methods.
Constructing and analyzing financial statements and reports.

NOTE: The KNOWLEDGE and SKILLS are required for initial consideration. Some duties performed by positions in this class may require different KS's. No attempt is made to describe every KS required for all positions in this class. Additional KS requirements will be explained on the recruiting announcement.

Adopted 1/98

Revised 10/02-Title change, minor revisions.

STATE OF OREGON
 Dept. of Administrative Services
 Human Resource Services Division