



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
June 17, 2025

Agency: Oregon Department of Energy

Facility:

☒ New ☐ Revised

This position is:

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

SECTION 1. POSITION INFORMATION

a. Classification Title:	<u>Program Analyst 3</u>	b. Classification No:	<u>C0862</u>
c. Working Title:	<u>Sr. Incentives Analyst</u>	d. PPDB No/WD ID:	<u>9252708</u>
e. Section Title:	<u>Energy Development Services Division</u>	f. Agency No:	<u>33000</u>
g. Employee Name:	<u>VACANT</u>	h. Budget Auth No:	
i. Supervisor Name:	<u>Duard Headley</u>	j. Repr. Code:	<u>UA</u>
k. Work Location (City – County):	<u>Salem - Marion</u>		
l. Position: <input type="checkbox"/> Permanent <input type="checkbox"/> Seasonal <input checked="" type="checkbox"/> Limited Duration <input type="checkbox"/> Academic Year <input checked="" type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Intermittent <input type="checkbox"/> Job Share			
m. FLSA: <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt	If Exempt: <input type="checkbox"/> Executive/Supervisory <input checked="" type="checkbox"/> Administrative <input type="checkbox"/> Professional <input type="checkbox"/> Computer		n. Eligible for Overtime: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.

The Oregon Department of Energy's vision is to lead Oregon to a safe, equitable, clean, and sustainable future. ODOE helps Oregonians make informed decisions and maintain a resilient and affordable energy system. We advance solutions to shape an equitable clean energy transition, protect the environment and public health, and responsibly balance energy needs and impacts for current and future generations.

ODOE helps Oregonians improve the energy efficiency of their homes, provides policy expertise to prepare for Oregon's future energy needs, staffs the Energy Facility Siting Council, provides technical and financial assistance to encourage investments in energy efficiency and renewable energy resources, represents Oregon's interests in the cleanup of the Hanford nuclear site, and ensures state preparedness to respond to energy-related emergencies. ODOE employs approximately 123 employees and is funded with revenue from more than 30 sources, including \$55.6 million in general funds, \$108.3 million in other funds, \$9.3

million in federal funds, \$1.4 million in lottery funds debt service, and \$29.4 million in non-limited loan program and debt service funds.

The Energy Development Services Division administers programs that provide financing and incentives to homeowners, renters, businesses, organizations, nonprofits, Tribes, schools, consumer-owned utilities, and public bodies installing projects that increase energy efficiency, generate renewable energy, encourage community resilience, or support the alternative fuels market. During the 2025-27 biennium, the division will administer the Community Renewable Energy Grant program as well as federal incentive programs including the Grid Resilience Grant Program, Home Energy Rebate Programs, and the Solar for All program as well as state-funded incentive programs.

- 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 agency’s Heat Pump Purchase Program (HP3) and other federally or legislatively mandated Energy Development Services (EDS) programs by providing advanced program coordination, data oversight, and stakeholder engagement. The position evaluates complex projects for feasibility and compliance with incentive and grant requirements, ensuring effective and accountable program delivery.

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
<i>Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".</i>			
50%	N	E	Program Planning and Administration <ul style="list-style-type: none"> Design, develop, and implement administrative processes and procedures for the Heat Pump Purchase Program and the distribution of grants and rebates, ensuring compliance with federal and state requirements. Collaborate with procurement staff, community partners, and the public to gather input, including managing Requests for Information (RFIs) to support contract development for program components. Research, develop, evaluate, and update standard operating procedures, policies, and program rules to adapt to evolving program needs and priorities. Design and maintain program databases and tracking systems to manage participant information, incentives, and available funding. Collect, analyze, and report program metrics to meet state and federal reporting requirements, ensuring transparent and accurate performance tracking. Partner with the Incentive Manager and diverse community members—including federal, state, local agencies, businesses, and nonprofit organizations, to develop inclusive outreach and informational materials. Develop training resources and informational tools to support applicants, contractors, and partners throughout the program lifecycle. Coordinate with the Human Resources section and other state agencies to establish interagency agreements that facilitate efficient program operations and incentive distribution.
40%	N	E	Program Management <ul style="list-style-type: none"> Provide technical assistance and guidance to ensure program objectives are met and maintain and update program technical standards and procedures as needed.

			<ul style="list-style-type: none"> Collaborate with federal, state, and local agencies, community partners, and other program teams to coordinate the distribution of grants and rebates.
			<ul style="list-style-type: none"> Maintain and update the program database to ensure accurate tracking of participants, incentives, contracts, and expenditures.
			<ul style="list-style-type: none"> Communicate clearly and respectfully with program participants, building and design professionals, vendors, and partners about program technical requirements, applicable laws, policies, and application processes.
			<ul style="list-style-type: none"> Partner with procurement staff and agency teams to monitor program contracts, track expenditures, and ensure timely processing of invoices.
			<ul style="list-style-type: none"> Support outreach efforts to meet program participation goals by collaborating with communications staff to develop marketing and public information materials, and by presenting program information to community groups, committees, and workgroups.
			<ul style="list-style-type: none"> Prepare and deliver training sessions on technical procedures, incentive distribution, and program rules to state and local professionals.
			<ul style="list-style-type: none"> Develop regular reports for management on program activities, participation levels, budget status, and challenges to inform decision-making and continuous improvement.
10%	N	E	Program Evaluation and Recommendation
			<ul style="list-style-type: none"> Evaluate program effectiveness, operational procedures, and rules to ensure alignment with program goals and consistency across energy projects; recommend improvements as needed.
			<ul style="list-style-type: none"> Conduct statistical analysis on program data and budgeted incentives to guide decision-making and adjustments that support program success.
			<ul style="list-style-type: none"> Promote equitable distribution and allocation of incentive funding through regular review and monitoring of program processes.
			<ul style="list-style-type: none"> Collaborate with program participants and implementers to assess needs, improve service quality, and ensure exceptional experience; recommend program enhancements accordingly.
			<ul style="list-style-type: none"> Monitor relevant legislative activity and prepare responses to inquiries from federal, state, and local government agencies; regularly report program progress and outcomes to management and partners.
Ongoing	N	E	Miscellaneous
			<ul style="list-style-type: none"> Perform duties in a manner that promotes customer service and harmonious working relationships; treat all individuals courteously and with dignity and respect.
			<ul style="list-style-type: none"> Lead and recognize the value of individual and cultural differences, demonstrate evidence of ongoing development of personal cultural awareness and humility, create and foster an inclusive work environment that is respectful, accepts diversity, and where talents and abilities are valued.
			<ul style="list-style-type: none"> Develop positive working relationships with agency staff and supervisors by actively partnering, communicating, and supporting co-workers, identifying and collaboratively resolving problems constructively.
			<ul style="list-style-type: none"> Demonstrate openness to constructive feedback and suggestions to improve work performance.
			<ul style="list-style-type: none"> Contribute to a positive and productive work environment; perform all duties in a safe manner; and comply with all policies, procedures, and agency best practices.
			<ul style="list-style-type: none"> Foster and promote the importance and value of a diverse and discrimination and harassment-free workplace.

			<ul style="list-style-type: none"> Participate in collaborative and strategic relationships with key invested, involved, or impacted partners by holding awareness and being attentive to the direct and indirect accountabilities and opportunities to positively impact and influence the goals, strategies, actions, and measures outlined in the agency's strategic plan.
			<ul style="list-style-type: none"> Other duties and special projects as assigned.
			<ul style="list-style-type: none"> Maintains confidentiality of information that is exempt from disclosure under Oregon's public records law.
			<ul style="list-style-type: none"> Ensure regular and consistent attendance to meet job demands and provide necessary services.

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.

The office environment is an open landscape with cubicles and audible distractions. This position requires long periods of sitting, standing, using a keyboard and other computer operations, and the use of a cell phone. Work requires lifting and carrying objects of up to 50 pounds, bending, crouching, use of arms above the shoulders, and transporting oneself throughout the office and to remote work locations. The position requires substantial reading, writing, and development of documents that require focus, reading comprehension, and writing skills. The work environment includes the use of electronic, audio-visual, and computer equipment. These working conditions are experienced daily. The employee must be able to complete work tasks under these types of conditions in this type of environment. An employee in this position must be available to work Monday through Friday with a regular 40-hour work schedule. The position may experience exposure to volatile or stressful situations and critical/hostile people. Work may require extended hours during the legislative session and as needed to accommodate short project timelines.

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.

Oregon Revised Statutes
Federal laws and guidelines
State and federal energy and environmental laws, standards and rules
USDOE Build America, Buy America Act
DAVIS-Bacon Requirements
Department of Administrative Services Administrative Rules
Department of Energy Administrative Rules
Department of Energy Policies and Procedures
ODOE desk procedures
Agency and division plans and reports including legislative reports
State and regional energy plans

b. How are these guidelines used?

Used in responding to questions from ODOE staff, federal and state entities, utilities, and vendors, or the public. Also used in determining compliance for processing work-related forms and documents. Ensure the information provided to the public is consistent with program operations. Ensure proper procedures are followed to provide the best possible service to the agency and the public.

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?
Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".			
Agency staff and internal teams	Email, phone, virtual platforms, and in person	Collaborate on program design, implementation, data, reporting, and service delivery	Daily
Program applicants and implementing partners (e.g., rental property owners, homeowners, builders, and manufacturers)	Email, phone, virtual platforms, and in person	Provide information and guidance on eligibility, processes, and program standards; support application and participation	Daily
Partner organizations (e.g., local governments, Tribal nations, utilities, nonprofit entities, businesses, and community-based organizations)	Email, phone, virtual meetings, in person	Coordinate outreach, technical assistance, grant implementation, and reporting	Daily
Oregon's Nine Federally Recognized Tribal Nations	Email, phone, virtual platforms, in person	Maintain government-to-government relationships; provide technical support, coordinate implementation, and share program opportunities	Daily
State government staff (e.g., Governor's Office, other state agencies)	Email, phone, official correspondence, virtual meetings, and in person	Align strategies, share updates, and respond to information or coordination requests	Monthly
Federal government agencies (e.g., U.S. Department of Energy, EPA)	Email, phone, virtual meetings, official correspondence	Report program status, ensure compliance, share data, and seek clarification or support	Monthly
Contractors and vendors	Email, phone, bid systems, virtual platforms, and in person	Request bids, coordinate work, provide specifications, and review deliverables	Monthly
Community members	Email, phone, public meetings, virtual platforms, outreach events	Share information and support participation in agency programs	As needed

SECTION 7. POSITION RELATED DECISION MAKING

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

This position exercises independent judgment and technical expertise in developing and applying rules, procedures, and standards for state and federally funded energy incentive programs. Working with minimal supervision, the position interprets and applies program guidelines to design service delivery models, determine project eligibility and feasibility, and ensure compliance with grant and rebate requirements.

Decisions involve analyzing program data and feedback to recommend improvements, establishing and updating technical energy standards, and evaluating submitted applications and project documentation for accuracy and alignment with program goals. The position regularly determines the validity and conformance of proposed or completed projects and provides recommendations that directly influence program performance, accountability, and accessibility.

Poor decision-making may result in misallocated funding, delays in service delivery, loss of trust or engagement from community partners, inaccurate reporting to federal agencies, and reputational damage to the agency's programs.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Business Operations Manager 2	2527006	Through ongoing dialogue, collaborative check-ins, and structured performance evaluations. Feedback may be provided during team meetings or one-on-one discussions.	Quarterly	To provide guidance, support professional development, ensure alignment with program goals, and assess performance and effectiveness.

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"/> Prepare & 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:

- Employment is contingent upon the successful completion of a criminal background check.
- This position requires the ability to travel as needed. The employee must possess and maintain a valid driver's license in their state of residence and have a satisfactory and acceptable driving record.

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

Operating Area	Biennial Amount (\$00000.00)	Fund Type

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

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