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| 1859                                    |

## STATE OF OREGON POSITION DESCRIPTION

## Position Revised Date: November 7, 2025

| 100 | POSITION DESCRIPTION            |             |           | RIPTION                |             | <u>Novembe</u> | r 7, 202  | <u>:5</u>                     |       |
|-----|---------------------------------|-------------|-----------|------------------------|-------------|----------------|---|-------------------------------|-------|
|     | gency: Ore                      | egon Depa   | artment o | of Energy<br>⊠ Revised |             |                | This position is  Classified Unclassified Executive Ser Mgmt Svc – S Mgmt Svc – M | vice<br>uperviso<br>lanageria | al    |
| SE  | SECTION 1. POSITION INFORMATION |             |           |                        |             |                |   |                               |       |
| a.  | Classificat                     | tion Title: | Program   | n Analyst 3            |             | b.             | Classification No:  | С                             | 0862  |
| c.  | Effective [                     | Date:       | July 1,   | 2023                   |             | d.             | Position No:  | 232                           | 25039 |
| e.  | Working T                       | itle:       | Sr. Ince  | entives Analyst        |             | f.             | Agency No:  | 33                            | 3000  |
| g.  | Section Ti                      | tle:        | Energy    | Development Ser        | rvices      | h.             | Budget Auth No:   |                               |       |
| i.  | Employee                        | Name:       | VACAN     | IT                     |             | j.             | Repr. Code:   |                               | UA    |
| k.  | Work Loca                       | ation (City | / – Coun  | ty): Salem - M         | larion      | J              | -   |                               |       |
| ı.  | Superviso                       | , -         |           |                        | (rishnaswan | ny             |   |                               |       |
|     | Position:                       | Perma       | anent     | Seasona                |             | =              | ted Duration  | Academ                        |       |
|     |                                 | ⊠ Full-T    |           | ☐ Part-Time            | _           |                | mittent   | Job Sha                       | _     |
| n.  | FLSA:                           | ⊠ Exem      | •         | If Exempt:             | Executive   |                | <ul><li>o. Eligible for Ove</li></ul>   | ertime:                       | ☐ Yes |
|     |                                 | ∐ Non-E     | xempt     | ☐ Professional         |             |                |   |                               | ⊠ No  |
|     |                                 |             |           |                        | Administra  | ative          |   |                               |       |
| OF  | CTIONIC                         | DDOOD       |           | DOCITION INC           | ODMATION    | \ I            |   |                               |       |

#### 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

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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:

Provide advanced program coordination, analytical support, and stakeholder engagement for the agency's Grid Resilience program and related federally and legislatively funded initiatives. This position evaluates complex project proposals for feasibility and compliance, supports development of program processes and reporting systems, and coordinates across internal and external partners to ensure accurate documentation, accountability, and fulfillment of grant requirements.

### **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  |
|-----------|--------|------|---|
|           |        |      | e are needed, place cursor at end of a row (outside table) and hit "Enter".   |
| 45%       | R      | E    | Program Development & Implementation  |
|           |        |      | <ul> <li>Contribute to the design and development of program processes and<br/>procedures for grant and rebate delivery.</li> </ul>   |
|           |        |      | <ul> <li>Coordinate information-gathering activities, including Requests for Information<br/>(RFI), with procurement staff, partners, and the public to inform program<br/>design and contracts.</li> </ul> |
|           |        |      | Research, draft, and support implementation of program standard operating procedures, policies, and rules.  |
|           |        |      | <ul> <li>Support development and maintenance of program databases to track<br/>participants, awards, rebates, and related metrics.</li> </ul>   |
|           |        |      | Collect, analyze, and report program metrics to meet federal and state reporting requirements.  |
|           |        |      | <ul> <li>Partner with the Incentive Manager to develop outreach strategies for<br/>applicants and program partners, including public agencies, community<br/>groups, utilities, and businesses.</li> </ul>  |
|           |        |      | Develop and maintain training materials and guidance for applicants and partners.   |
|           |        |      | <ul> <li>Recommend improvements to program processes, templates, and reporting<br/>based on analysis and stakeholder input.</li> </ul>  |
|           |        |      | Coordinate with Human Resources and administrative teams to support interagency agreements with state and local government partners.  |
|           |        |      | Monitor and maintain program funding data and status information.   |
| 45%       | R      | Е    | Program Management & Coordination   |
|           |        |      | Provide technical assistance on program requirements and support program standards updates as necessary.  |
|           |        |      | <ul> <li>Coordinate with federal and state agencies, local governments, and partners<br/>to support grant and rebate distribution planning.</li> </ul>  |
|           |        |      | Maintain program database content to ensure data accuracy and integrity.  |
|           |        |      | Communicate with participants, design professionals, vendors, and others to explain program requirements, laws, policies, and application processes.  |
|           |        |      | Work with procurement and finance teams to track program contracts, expenditures, and invoices.   |
|           |        |      | <ul> <li>Support outreach and engagement activities in collaboration with<br/>communications staff; assist with development and distribution of public<br/>information and marketing materials.</li> </ul>  |

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|          |    |   | Deliver presentations and trainings to stakeholder groups, committees, and   |
|----------|----|---|--|
|          |    |   | <ul> <li>task forces explaining program requirements and funding processes.</li> <li>Provide program updates to management, including participation data,</li> </ul>   |
|          |    |   | issues, and budget status.   |
| 10%      | R  | Е | Program Evaluation & Continuous Improvement  |
|          |    |   | <ul> <li>Evaluate program effectiveness, operational procedures, and rules,<br/>recommending improvements to support program goals and consistency<br/>across projects.</li> </ul>   |
|          |    |   | <ul> <li>Conduct statistical analyses on program data and incentives to support<br/>program recommendations and performance monitoring.</li> </ul>   |
|          |    |   | <ul> <li>Monitor equitable distribution of incentive funding through routine program<br/>reviews.</li> </ul>   |
|          |    |   | Assess participant and implementer needs to support continuous improvement and customer service excellence.  |
|          |    |   | <ul> <li>Track legislative activity; prepare information and responses to federal, state<br/>and local government requests; and report on program progress.</li> </ul>   |
| On-going | NC | Е | Miscellaneous  |
|          |    |   | <ul> <li>Perform duties in a manner that promotes customer service and harmonious<br/>working relationships; treat all individuals courteously and with dignity and<br/>respect.</li> </ul>  |
|          |    |   | <ul> <li>Lead and recognize the value of individual and cultural differences,<br/>demonstrate evidence of ongoing development of personal cultural<br/>awareness and humility, create and foster an inclusive work environment that<br/>is respectful, accepts diversity, and where talents and abilities are valued.</li> </ul>   |
|          |    |   | <ul> <li>Develop positive working relationships with agency staff and supervisors by<br/>actively partnering, communicating, and supporting co-workers, identifying<br/>and collaboratively resolving problems constructively.</li> </ul>  |
|          |    |   | Demonstrate openness to constructive feedback and suggestions to improve work performance.   |
|          |    |   | <ul> <li>Contribute to a positive and productive work environment; perform all duties<br/>in a safe manner; and comply with all policies, procedures, and agency best<br/>practices.</li> </ul>  |
|          |    |   | <ul> <li>Foster and promote the importance and value of a diverse and discrimination<br/>and harassment-free workplace.</li> </ul>   |
|          |    |   | <ul> <li>Participate in collaborative and strategic relationships with key invested,<br/>involved, or impacted partners by holding awareness and being attentive to<br/>the direct and indirect accountabilities and opportunities to positively impact<br/>and influence the goals, strategies, actions, and measures outlined in the<br/>agency's strategic plan.</li> </ul> |
|          |    |   | Other duties and special projects as assigned.   |
|          |    |   | Maintains confidentiality of information that is exempt from disclosure under Oregon's public records law.   |
|          |    |   | <ul> <li>Ensure regular and consistent attendance to meet job demands and provide<br/>necessary services.</li> </ul>   |

### **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

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exposure to volatile or stressful situations and critical/hostile people. Regular travel throughout the state. Occasional interstate travel. Attendance at evening and weekend meetings or events may be required. Requires the ability to work quickly under deadlines for multiple projects.

### 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
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

## b. How are these guidelines used?

Guidelines are used to interpret program requirements, respond to inquiries from ODOE staff, federal and state agencies, utilities, vendors, and the public, and evaluate whether program applications, documentation, and project activities meet eligibility and compliance standards. These guidelines ensure that information shared externally is accurate and consistent with program rules and processes, and that work products and decisions follow established procedures. Accurate application of guidelines supports consistent program delivery, compliance with funding requirements, and high-quality service to applicants, partners, 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 curs        | or at end of a row (outside table) and hit "Enter".            |            |
| Agency Staff  | By phone, email, in person, virtual       | Exchange information   | Daily      |
| Program applicants and Partners   | By phone, email, in person, virtual       | Exchange information, provide program and technical assistance | Daily      |
| Applicant partners (local governments, non-governmental entities, utilities, communities, businesses) | By phone, email, in person, virtual       | Exchange information, provide program and technical assistance | Daily      |
| State Staff (Gov. office, other state agencies)   | By phone, email, in person, mail, virtual | Exchange information   | Monthly    |
| Trade allies  | By phone, email, in person, virtual       | Assign work, evaluate work, answer questions, request bids     | Monthly    |
| General Public  | By phone, email, in person, virtual       | Provide program and technical assistance                       | As needed  |
| US Department of Energy and Staff (other federal agencies)  | By phone, email, in person, mail, virtual | Exchange information   | Monthly    |

### SECTION 7. POSITION RELATED DECISION MAKING

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

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This position exercises independent professional judgment to interpret program requirements, evaluate complex project proposals, and determine whether submissions meet established program criteria, grant terms, and technical standards. The position plans and prioritizes work activities with minimal supervision, applying federal and state guidance, program rules, and internal procedures to carry out assignments.

Typical decisions include assessing project eligibility and documentation; recommending improvements to program processes, tools, and reporting systems; advising applicants and internal stakeholders on program requirements; and determining appropriate actions to resolve compliance issues or data discrepancies. The position provides recommendations to leadership on program refinements and operational needs to support effective program delivery.

Decisions made in this role directly influence program operations, compliance, and participant experience. Errors in judgment can result in incorrect funding decisions, compliance deficiencies, delays in program execution, strained relationships with partners and applicants, and reputational or financial impacts to the agency.

### **SECTION 8. REVIEW OF WORK**

## Who reviews the work of the position?

| Classification Title                | <b>Position Number</b>   | How   | How Often             | Purpose of Review   |
|-------------------------------------|--------------------------|---|-----------------------|---|
| Note: If additional row             | s of the below table are | needed, place cursor at end of a  | row (outside table)   | ) and hit "Enter".  |
| Business<br>Operations<br>Manager 3 | 2325037                  | 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. |
| SECTION 9. OV                       | ERSIGHT FUNCT            | TIONS THIS SECTION  | ON IS FOR <u>SUPE</u> | ERVISORY POSITIONS ONLY   |
| How many e                          | mployees are sup         | ectly supervised by this potervised through a subord some does this position do?  |                       | o 0 0 0 0   |

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 to agency operating money, indicate the following:

| 8   |                              |           |  |  |  |
|---|------------------------------|-----------|--|--|--|
| 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". |                              |           |  |  |  |
|   |                              |           |  |  |  |
|   |                              |           |  |  |  |

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## **SECTION 11. ORGANIZATIONAL CHART**

Attach a <u>current</u> 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.

| bosition. Classification title, classification number, salary range, employee harte and position number. |          |                      |      |  |  |  |  |
|--|----------|----------------------|------|--|--|--|--|
| SECTION 12. SIGNATURES   |          |                      |      |  |  |  |  |
| Employee Signature   | <br>Date | Supervisor Signature | Date |  |  |  |  |
| Appointing Authority Signature   | Date     |                      |      |  |  |  |  |

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