



State of California
California Energy Commission
DUTY STATEMENT
CEC-004 (Revised 5/2023)

Classification: Energy Commission Specialist II

Working Title: Rebates and Incentives Specialist

Position Number: 535-540-4185-XXX

Division/Branch or Office: Reliability, Renewable Energy & Decarbonization Incentives / Federal Incentives & Financing

Collective Bargaining Identifier (CBID): R10

Work Week Group (WWG): E

Effective Date: December 15, 2023

Conflict of Interest (COI): Yes No

If yes, this position is responsible for making or participating in the making of governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete Form 700 within 30 days of appointment, which identifies pertinent personal financial information.

Job Description

Under general direction of the Energy Resources Specialist III (Supervisory) in the Reliability, Renewable Energy & Decarbonization Incentives Division, Federal Financing & Incentives Branch, HEEHRA Incentives & Contractor Training Units, the Energy Commission Specialist II (incumbent) will provide expert guidance on highly complex and technical problems; and provide expert consultation services within in their area of expertise in the field of single-family and multifamily residential building decarbonization and energy efficiency in support of rebates and incentives programs. The incumbent will serve as a lead program planning and program implementation specialist. The incumbent will perform sensitive and complex analyses requiring a high degree of judgment and technical knowledge. The incumbent will have responsibility for projects requiring coordination of several staff inside and outside of the California Energy Commission (CEC). Projects led by the incumbent are critical to the mission of the CEC, addressing broad national issues such as global climate change.

Essential Duties

25% **Solicitation Development and Management:** Develop and oversee multimillion dollar solicitations, grants, and interagency agreements related to planning and implementation of residential building decarbonization and energy efficiency rebate and incentive programs. Manage contract agreements and work authorizations, including coordination with the branch's

teams in preparation of solicitations, contract agreements, and work authorization documents. Serve as a solicitation manager and team leader, coordinating the work of other staff specialists for solicitation development, management, proposal scoring, and selection of grantees. Serve as the key point of contact on solicitation and grant issues with industry counterparts and grantees. Provide direction and feedback to contractors on workplans and work products, draft work authorizations, and review deliverables.

- 20% **Written Material Development:** Lead the development of presentations, outreach, training, and education materials. Draft and review program documents and guidebooks, program metrics, reports, briefings, memos, letters, forms, web-based information, and other documents related to building decarbonization, distributed generation programs, and other energy related topics. Lead drafting and finalization of applications to federal agencies. Produce documentation, diagrams, and workflows to support a streamlined user experience as well as compliance with federal and state requirements for residential rebate and incentive programs.
- 15% **Coordination and Collaboration:** Serve as subject matter expert in leading the building decarbonization activities. Represent the division and CEC at stakeholder workgroups and policy forums with other state and federal agencies, professionals, and energy policy experts to increase understanding of barriers and contribute to identifying opportunities and pathways to increase decarbonization and energy efficiency. Lead the coordination of activities and program requirements with stakeholders, including the energy industry, trade associations, utilities, the public, and other state, federal, and local agencies. Facilitate workshops, conferences, trainings, and outreach events. Respond to stakeholder inquiries, including drafting and reviewing responses, necessary policy research, data querying, and coordination of meetings between stakeholders and staff.
- 10% **Claim & Loan Payment Processing:** Review the most complex documentation submitted for payment claims to identify deficiencies; notify and work with participants to resolve deficiencies related to payment claims. Maintain current information on all program databases and workload tracking tools. Respond to requests for assistance and information related to grant and incentive programs, energy policy, and renewable energy technologies. Lead in the development and review of work statements, budgets, schedules, and special terms and conditions for CEC agreements, grants, and contracts.
- 10% **Technical & Policy Resource:** Provide expert technical research and provide data and written material to support various programs. Represent the branch and division at internal commissioner briefings. Make informed recommendations related to planning, procedures, and policies for consideration by the supervisor of the unit.
- 10% **Budget Planning and Management:** Develop budget proposals for delivery of large and complex programs. Forecast multi-year program activity and prepare documentation for federal agencies. Manage and track program costs. Coordinate with other CEC staff to track and appropriately allocate expenses.



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Marginal Duties

- 5% Attend and lead the coordination of workshops, hearings, conferences, and meetings on topics associated with the CEC's building decarbonization, reliability, and renewable energy programs.
- 5% Perform other related duties as required, consistent with the specification of this classification.

Working Conditions

The CEC supports a hybrid workplace model with office-based and remote-centered workers. Limited in-person attendance and occasional travel may be required based on the needs of the division. Regular and consistent attendance is essential to successful performance. This position is remote-centered, which means the incumbent works 50 percent or more of their time from an alternate work location.

Diversity and Inclusion Statement

Serving all Californians, the CEC embodies diversity, equity, and inclusion, and has taken an active and meaningful role in creating an environment that enables each employee to thrive.

Employee's Acknowledgement: I certify that I am able to perform, with or without the assistance of a reasonable accommodation, the essential duties of this position.

Employee's Name (Print): _____

Employee's Signature: _____ **Date:** _____

Supervisor's Acknowledgment: I certify this duty statement represents a current and accurate description of the essential functions of this position. I have discussed the duties of this position with and provided the above-named employee a copy of this duty statement.

Supervisor's Name (Print): _____

Supervisor's Signature: _____ **Date:** _____



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DUTY STATEMENT
CEC-004 (Revised 5/2023)

Classification: Energy Commission Specialist I

Working Title: Rebates and Incentives Specialist

Position Number: 535-540-4184-XXX

Division/Branch or Office: Reliability, Renewable Energy & Decarbonization Incentives / Federal Incentives & Financing

Collective Bargaining Identifier (CBID): R10

Work Week Group (WWG): E

Effective Date: December 15, 2023

Conflict of Interest (COI): Yes No

If yes, this position is responsible for making or participating in the making of governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete Form 700 within 30 days of appointment, which identifies pertinent personal financial information.

Job Description

Under general direction of the Energy Resources Specialist III (Supervisory) in the Reliability, Renewable Energy & Decarbonization Incentives Division, Federal Financing & Incentives Branch, HEEHRA Incentives & Contractor Training Unit, the Energy Commission Specialist I (incumbent) will independently perform more complex, sensitive, and responsible building decarbonization-related work which requires a high level of knowledge, skill, and ability which is demonstrably above the journey level, in the field of single-family and multifamily residential building decarbonization and energy efficiency. The incumbent performs responsible technical and analytical work demonstrably above the journey level to administer and provide oversight to rebate and incentive programs. The incumbent will serve as a knowledgeable resource on policy, technology, market, and strategic issues as directed; and plays a primary role in coordination and collaboration with other state, federal, and local agencies, as well as other interested stakeholders and the public.

Essential Duties

30% **Documents and Deliverables.** Exercise lead responsibility in the preparation of applications to federal agencies; budget drafts and program activity forecasts; program guidelines; program factsheets and tools; briefings; issue memoranda; slide decks; comparisons of requirements, process flows and other visuals; and data analyses; to support the design and implementation of and reporting on residential decarbonization rebate and incentive programs. Prepare policy, economic, and technical analyses and recommendations; and write or contribute to reports.

- 20% **Solicitation Development & Contract Management:** Draft solicitations and interagency agreements related to planning and implementation of residential building decarbonization and energy efficiency rebate and incentive programs in coordination with program lead. Participate in the management of contract agreements, such as reviewing deliverables, invoices, and monitoring scope of work. Assist in the management of contract work authorizations including coordination with the division's contract manager in preparation of work authorization documents, review, and approval of deliverables, monitor work progress, and review and approval of invoices.
- 20% **Decarbonization.** Lead decarbonization activities targeting the built environment. Work with other agencies, professionals, and energy policy experts to increase understanding of barriers and contribute to identifying opportunities and pathways to increase building decarbonization. Prepare reports on decarbonization-related project, program, and technology issues and achievements. Exercise lead responsibility as project manager for projects and programs within branch. Provide lead technical expertise on research, analyses, and evaluation of delivery of residential rebate and incentive programs including complex issues related to a streamlined user experience, eligibility verifications, data collection, and compliance with federal and state requirements.
- 20% **Operations.** Produce documentation, diagrams, and workflows to support a streamlined user experience as well as compliance with federal and state requirements for residential rebate and incentive programs. Catalogue data needs and plan for data collection points. Research and make recommendations on complex operational issues such as the application of rebate values at the point of sale.

Marginal Duties

- 5% Attend and lead the coordination of workshops, hearings, conferences, and meetings on topics associated with the CEC's energy programs.
- 5% Perform other related duties as required, consistent with the specification of this classification.

Working Conditions

The CEC supports a hybrid workplace model with office-based and remote-centered workers. Limited in-person attendance and occasional travel may be required based on the needs of the division. Regular and consistent attendance is essential to successful performance. This position is remote-centered, which means the incumbent works 50 percent or more of their time from an alternate work location.

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Employee's Name (Print): _____

Employee's Signature: _____ **Date:** _____

Supervisor's Acknowledgment: I certify this duty statement represents a current and accurate description of the essential functions of this position. I have discussed the duties of this position with and provided the above-named employee a copy of this duty statement.

Supervisor's Name (Print): _____

Supervisor's Signature: _____ **Date:** _____