

# DUTY STATEMENT

## CALIFORNIA PUBLIC UTILITIES COMMISSION

<b>DIVISION</b> Energy Division	EFFECTIVE DATE
<b>BRANCH/SECTION</b> Energy/ Climate Initiatives, Renewables, and Administration Branch / Budget and Tariffs Section	<b>CLASS TITLE</b> Analyst II
<b>WORKING DAYS AND WORKING HOURS</b> Monday through Friday 8:00 a.m. to 5:00 p.m.	<b>PHYSICAL WORK LOCATION</b> San Francisco or Sacramento
<b>INCUMBENT (if known)</b>	<b>CURRENT POSITION NUMBER (Agency - Unit - Class - Serial)</b> 680-321-5393-010

YOU ARE A VALUED MEMBER OF THE DEPARTMENT'S TEAM. YOU ARE EXPECTED TO WORK COOPERATIVELY WITH TEAM MEMBERS AND OTHERS TO ENABLE THE DEPARTMENT TO PROVIDE THE HIGHEST LEVEL OF SERVICE POSSIBLE. YOUR CREATIVITY AND PRODUCTIVITY ARE ENCOURAGED. YOUR EFFORTS TO TREAT OTHERS FAIRLY, HONESTLY AND WITH RESPECT ARE IMPORTANT TO EVERYONE WHO WORKS WITH YOU.

**BRIEFLY (1 or 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS:**

Under the direction of the Tariff Unit Supervisor I, the Analyst II provides oversight and maintenance for the Energy Division Advice Letter website, performs more responsible, varied, and complex technical analytical staff services assignments such as contract oversight and program evaluation and planning; policy analysis and formulation; systems development; and providing consultative services to management, engineers and Public Utilities Regulatory Analysts (PURAs) of the Energy Division. Performs a variety of complex technical analytical duties requiring independent action and initiative. This position requires strong organizational skills, attention to detail, and ability to collaborate across teams to ensure timely and accurate deliverables. Duties must be performed at the highest degree of competence as there would be a high degree of impact on the Division with the responsibilities listed below. Budget authority created from the Public Utilities Commission Utilities Reimbursement Account (PUCURA) to establish this position to monitor and evaluate the Advice Letter legacy website. The incumbent will consider diversity, equity, and inclusion in policy analysis, stakeholder engagement, and internal processes. This position is office-based in San Francisco or Sacramento. Duties require in office presence a minimum of 3 days or more a week.

<b>% of time performing duties</b>	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. <i>(Use additional sheet if necessary)</i>
------------------------------------	---

40%	<p><b><u>ESSENTIAL FUNCTIONS:</u></b></p> <p>This position will lead the Energy Division Advice Letter Legacy Website with oversight, maintenance, and administration. In so doing, position will support Energy Division's Advice Letter website, which will serve the agency's goals of transparency and provide the public and stakeholders with critical information on how utilities are implementing CPUC's decisions and orders related to energy rates and policy. Position will aid in the development and further implementation of the Energy Division's Advice Letter website, allowing ratepayers to follow the decision implementation process in real time and to provide meaningful and timely input. Community Choice Aggregators (CCA), Core Transport Agents (CTA), Electric Service Providers (ESP) and other business entities meet Advice Letter filing requirements with 1,500 Energy Division Letters, on average, filed annually.</p> <ul style="list-style-type: none"> <li>• Lead point person for major website contract to update and maintain critical records.</li> <li>• Monitor Advice Letter submissions to Energy Division Tariff Unit to ensure that they align with Advice Letters posted on the website.</li> <li>• Assist with Advice Letter records requests from staff, external parties and press.</li> <li>• Meet in person and virtually with management to share Energy Division Advice Letter website updates.</li> <li>• Reach out to utilities and entities to provide password and log-in information and support them with any website log-in needs.</li> <li>• Work with Information Technology Division Support and vendor to ensure Advice Letter website is functional.</li> <li>• Oversight of external vendor contract and managing the entire contract lifecycle to ensure compliance, performance, and value.</li> <li>• Monitoring website contract budget and invoicing and maintaining regular communication with vendor to mitigate risks and ensure deadlines are met.</li> <li>• Website oversight and maintenance: providing, with assistance of vendor, technical maintenance, security, content auditing, performance tracking, and legal compliance.</li> <li>• Monitoring traffic trends to see how users interact with the site and reporting those findings to stakeholders.</li> </ul>
-----	--

**DUTY STATEMENT****CALIFORNIA PUBLIC UTILITIES COMMISSION**

	<p><b><u>ESSENTIAL FUNCTIONS (continued)</u></b></p> <ul style="list-style-type: none"> <li>• Assist public with directions about how to navigate Advice Letter website and assist utilities with submissions.</li> <li>• Monitor and provide oversight for Advice Letter database.</li> </ul> <p>35% Serve as the lead analyst reviewing and analyzing General Order (GO) 96-B rules related to Advice Letters (AL) and Resolution processing. Acts as a subject matter expert to staff explaining these rules. Analyze the current ALs tracking system and develop recommendations for Division management to ensure the ALs are processed in a consistent, efficient manner using best practices and produce regular status reports. Analyze AL workload and backlog regularly and follow up with staff to dispose of advice letters within the prescribed GO 96-B timelines. Review and analyze incoming ALs for compliance with the basic requirements of GO 96-B (which outlines the essential format and components of an acceptable AL) and notifying the utility when revision is required. Coordinate Tariff Unit workload including completing and/or tracking the completion of multiple tasks, including but not limited to:</p> <ul style="list-style-type: none"> <li>• Provide in-person guidance to Energy Division staff in office and in regional offices regarding Advice Letters.</li> <li>• Create the "Official Folder" for advice letters;</li> <li>• Create and update PAL entries (Proposal/Advice Letter/Protest Tracking System);</li> <li>• Receive completed/signed advice letter folders from Energy Division staff;</li> <li>• Send disposition letters to utilities;</li> <li>• Assisting with the archives (advice letter 2 years and older);</li> <li>• Processing, serving, and web publishing all draft, final, and executive resolutions.</li> </ul> <p>Serves as the Liaison with Utilities Regulatory Affairs Departments to enforce CPUC Regulations and Processes. Record and dispose of ALs in the Proposal/Advice Letter Tracking System (PAL) Database by ensuring the appropriate parties are served. Run Open AL Reports for the Division Director and Program Managers on an as needed basis. Formulated schedule to implement all steps in the Resolution process from Draft to Finalization in accordance with the CPUC Process Office.</p> <p>20% Evaluate the Division Tariff Unit processes and identify process/service gaps and inefficiencies. Survey Tariff Unit staff on ideas for process improvements, process gaps, communication issues with Division staff (e.g. issues centered on Tariff Unit processes and expectations, responsibilities). Formulates new procedures for the handling of electronic documents in the Tariff Unit (e.g. electronic uploading of ALs, AL Protests, Protest Replies, AL Responses, and Resolution Comments); document and post the Tariff's Unit Procedures on the Energy Division Resource Page (Intranet). Implement new procedures involving the processing of resolutions (e.g. tracking Tariff Unit staff accountability; developing PowerPoint training (Resolutions/Advice Letters) for analysts; refining process for communication between Division staff and the Tariff Unit. Manage the Tariff Unit Inbox by checking emails and responding to inquiries. Optimize the Division system of cataloging Investor-Owned Utilities (IOU) Tariff Sheets from paper to electronic files. Oversight and maintenance of all hard copy files in San Francisco, Sacramento, and Los Angeles offices to ensure they are filed securely and easily locatable, and as appropriate sent to off-site storage, archiving of digital copies, in concert with branches as appropriate, for safekeeping and traceability per State Records Management Act guidelines, determination of "archival value" of hard copy and digital material in the division, working in concert with management to determine purge dates of material, if any, in coordination with State Records Center and the CPUC Records Retention Division.</p> <p>Collaborate with the Division staff and management on ideas for improving the processing of ALs/Resolutions and identify other areas of improvement. Provide training at regular cadence for staff and stakeholders about Advice Letter processes, work with Utility liaisons to develop seamless access to AL filings, protests, and comments on advice letter filings through the CPUC website.</p>
--	--

# DUTY STATEMENT

## CALIFORNIA PUBLIC UTILITIES COMMISSION

5%	<p><b><u>Marginal Functions:</u></b></p> <ul style="list-style-type: none"> <li>• Other related job duties as required.</li> </ul> <p><b><u>KNOWLEDGE AND ABILITIES</u></b> <i>[From Class Specs]</i></p> <p><b>Knowledge of:</b> Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; government functions and organization; and methods and techniques of effective conference leadership.</p> <p><b>Ability to:</b> Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively both orally and in writing; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; gain and maintain the confidence and cooperation of those contacted during the course of work; coordinate the work of others, act as a team or conference leader; and appear before legislative and other committees.</p> <p><b>Special Personal Characteristics:</b> Demonstrated ability to act independently, open-mindedness, flexibility, and tact.</p> <p><b><u>WORK ENVIRONMENT, PHYSICAL OR MENTAL ABILITIES:</u></b></p> <ul style="list-style-type: none"> <li>• This is an office-based position location in CPUC offices in San Francisco or Sacramento. Will support technical staff as needed onsite.</li> <li>• Proficiency with communications-related technologies, including personal computer applications, telecommunications equipment, Internet, voicemail, email, etc.</li> <li>• Safety: Work related to safety, including both policy and program oversight work to ensure the energy system is safe, and tasks related to the safety of the workplace.</li> <li>• Proficiency with communications-related technologies, including personal computer applications, telecommunications equipment, Internet, voicemail, email, etc.</li> <li>• Travel to other CPUC offices or other locations within the state may be required.</li> <li>• Limited travel is required within California and may require overnight stay.</li> <li>• Requires being stationary, consistent with office work, for extended periods.</li> <li>• Standard office environment (artificial lighting, controlled temperature, etc.)</li> </ul>	
<b>SUPERVISOR'S STATEMENT: I HAVE DISCUSSED THE DUTIES OF THE POSITION WITH THE EMPLOYEE</b>		
SUPERVISOR'S NAME (Print) Matthew Iribarne	SUPERVISOR'S SIGNATURE  	DATE  
<b>EMPLOYEE'S STATEMENT: I HAVE DISCUSSED WITH MY SUPERVISOR THE DUTIES OF THE POSITION AND HAVE RECEIVED A COPY OF THE DUTY STATEMENT</b>		
The statements contained in this duty statement reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absence of relief, to equalize peak work periods or otherwise balance the workload.		
EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE  	DATE  