



PRINCIPAL ENERGY ANALYST

JC: 000355

PG: H

BU: 31 (AFSCME)

FLSA: Exempt

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

DEFINITION

Under general supervision, plans and performs the most complex and difficult work of staff responsible for the procurement of wholesale electricity, other wholesale energy products and compliance instruments, and retail natural gas; may supervise, assign, and review the work of staff responsible for coordinating regulatory matters relating to the District's unburdened power supply; supports the development of budget projections and leads periodic budget reconciliation; oversees invoicing from and payment to District vendors; coordinates energy-related projects and studies; provides staff assistance to the Manager of Energy; and performs other related duties as assigned.

CLASS CHARACTERISTICS

This is the highest working level with the Energy Analyst series. Positions at this master level perform the most technical and complex duties assigned to the series. This classification, requires specialized, technical, or functional expertise, may also be responsible for overseeing the work of lower-level staff, and/or assisting higher-level managerial staff in planning and evaluating the quantity and quality of work performance by subordinate staff. Employees at this level are routinely assigned responsibilities above the journey level and must be capable of exercising independent judgement in the execution of all duties. This position is distinguished from the Manager of Energy in that the latter is responsible for overall management of the Energy Division and serves as the primary point of contact regarding managing and executing the transmission and distribution of energy agreements.

REPORTS TO

Manager of Energy

EXAMPLES OF DUTIES – *Duties may include, but are not limited to, the following:*

1. Performs the most complex and difficult work of staff responsible for the wholesale procurement of electricity and retail procurement of natural gas on behalf of the District; may plan, prioritize, assign, supervise, and review the work of lower level Energy Division staff.
2. Manages and administers electricity supply and other energy-related contracts, including the oversight and reconciliation of product and service delivery, and resolution of inaccuracies or conflicts with counterparties that may arise.
3. Negotiates new agreements for energy products or services, including the evaluation of pricing and other terms and conditions.

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4. Responds to data requests from other internal departments, executive management, regulators, the District's Board of Directors, or the public.
5. Coordinates utility service connections, generator interconnections, and/or other energy services with local utilities to support the District's operations and system expansion activities.
6. Oversees the preparation of annual operating budgets for electricity and natural gas, including development of multi-year budget projections, analysis of quarterly budget variances, and the forecast of long-term energy-related costs and revenues.
7. Participation in rulemaking, workshops, and regulatory proceedings germane to the District's acquisition of energy, energy procurement authorities, and/or compliance requirements.
8. Evaluates proposed tariff or market design modifications, updates, or amendments, with potential impact to the BART's energy procurement, including advocacy on behalf of the District.
9. Proposes, plans, and develops draft legislation on energy issues; submits to higher level staff for comment and approval.
10. Prepares feasibility studies and/or economic evaluations of innovative energy-related projects or technologies to support capital initiatives or the acquisition of the District's energy supply.
11. Presents technical analysis to internal committees, executive management, and the BART Board of Directors.
12. Serves as subject-matter expert to other internal stakeholders with respect to wholesale power procurement, wholesale market tariffs, and electric service contracts and agreements.
13. Trains assigned employees in their areas of work including energy analysis methods, procedures, and techniques; acts as an internal consultant and expert to other departments on understanding the applicability of electric and natural gas tariffs.
14. Coordinates the work of outside consultants, experts, and attorneys; coordinates projects and activities; reviews work progress.
15. Represents the District at a variety of professional meetings associated with energy procurement and planning; stays current on new technologies related to energy utilization and conservation.

QUALIFICATIONS

Knowledge of:

- Operations, activities, and services comprising wholesale electricity procurement
- Principles of lead supervision and training
- Operations, activities, and services comprising wholesale electricity procurement
- Principles of energy markets and operations
- Advanced methods of quantitative, statistical, and financial analysis
- Methods and techniques to analyze and forecast energy needs and costs

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- Principles and practices of contract administration and management
- Prevailing industry practices of the electric power sector
- Advanced principles and practices of energy procurement, utilization, and conservation
- Analytical tools and software to support long-term electric supply planning and procurement
- Federal, state, and local laws, regulations, and utility tariffs governing wholesale electric procurement in California
- Fundamentals of financial and managerial accounting

Skill/ Ability in:

- Selecting, supervising, training, and evaluating staff
- Resolving and settling contract disputes
- Leadership and oversight of collaborative activities
- Independent execution of complex analyses related energy supply, usage, and cost
- Execution and enforcement of department policies and procedures
- Interpretation of complex rules and regulations
- Design and execution of technology evaluation and feasibility studies to determine costs and benefits, and other available alternatives
- Development of analytical tools or models to automate existing processes or procedures
- Interpretation of quantitative analysis and presentation of results
- Operation of office equipment, including personal computers and proficiency in Microsoft Office software
- Working independently in the absence of supervision
- Understanding and following oral and written instructions
- Communicating clearly and concisely, both orally and in writing
- Providing excellent customer service to other internal departments, executive management, BART's Board of Directors, and other stakeholders
- Production of high-quality work in a timely manner and on several activities simultaneously
- Establishing and maintaining effective working relationships with those contacted in the course of work

MINIMUM QUALIFICATIONS

Education:

A Bachelor's degree in accounting, business administration, economics, or a closely related field from an accredited college or university.

Experience:

Four (4) years of (full-time equivalent) verifiable professional energy program analysis experience.

Substitution:

Additional professional experience as outlined above may be substituted for the education on a year-for-year basis. A college degree is preferred.

WORKING CONDITIONS

Environmental Conditions:

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Office environment; exposure to computer screens; field environment; some exposure to heat, cold, or inclement weather conditions.

Physical Conditions:

May require maintaining physical condition necessary for sitting for prolonged periods of time.

BART EEO-1 Job Group: 3500 – Professionals
Census Code: 0840 – Financial Analysts
Safety Sensitive: N

CLASSIFICATION HISTORY

Created: August 2022
Reviewed: March 2023