

STATE OF OHIO (DAS)CLASSIFICATION
SPECIFICATION**CLASSIFICATION SERIES:**

Utility Analyst

SERIES NO.:

6694

MAJOR AGENCIES:

Public Utilities Commission, Consumers' Counsel

EFFECTIVE DATE:

03/07/2004

SERIES PURPOSE:

The purpose of the utility rate analyst occupation is to conduct research & analysis in designated areas of utility regulations.

At the first level, incumbents receive training in conducting research & analysis pertaining to utility industry.

At the second level, incumbents independently design & implement research studies.

At the third level, incumbents act as technical experts or lead workers.

CLASS TITLE:

Utility Analyst 1

CLASS NUMBER:

66941

EFFECTIVE DATE:

03/07/2004

CLASS CONCEPT:

The developmental level class works under immediate supervision & requires working knowledge of utility industry in order to receive training in conducting research & analysis pertaining to utility industry.

CLASS TITLE:

Utility Analyst 2

CLASS NUMBER:

66942

EFFECTIVE DATE:

09/01/1996

CLASS CONCEPT:

The full performance level class works under general supervision & requires considerable knowledge of utility industry in order to independently design & implement research studies pertaining to utility industry.

CLASS TITLE:

Utility Analyst Coordinator

CLASS NUMBER:

66943

EFFECTIVE DATE:

09/01/1996

CLASS CONCEPT:

The advanced level class works under direction & requires considerable knowledge of utility industry in order to act as technical expert or team leader over lower-level utility analysts on project basis.

CLASS TITLE: Utility Analyst 1	CLASS NUMBER: 66941	BARGAINING UNIT: 14
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EFFECTIVE DATE:

03/07/2004

JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

Receives training in how to properly conduct research & analysis on accounting, economic &/or engineering issues affecting regulation of gas, electric, telecommunications, water & sewer utilities (e.g., rate &/or tariff applications, alternative regulation applications, environmental compliance plan applications, utility long-range forecasts &/or integrated resource plans, energy issues, energy policy, alternative energy initiatives, &/or issues related to proposed new major electric & gas facilities in Ohio, performs studies following prescribed procedures (i.e., steps to be followed while conducting research & analyzing information are outlined by higher-level staff who is also responsible for checking work in progress & when completed), assists in review of rate structures, tariff schedules & revenue distribution of utility companies requesting increases, in collecting & interpreting energy related information requirements, conducts analysis of market trends as well as cost recovery methods & procurement procedures to determine company compliance with commission rules or orders, or state law, & assists in review & analysis of various performance measures including, but not limited to, utility operating, financial, organizational processes & structures for compliance with agency & legislative requirements.

Assists in preparing reports, summaries &/or draft orders following specific instructions issued by higher-level staff.

Assists in responding to requests for information from state, federal or public utility officials or general public; attends meetings with company officials, other government agencies & others when assigned.

MAJOR WORKER CHARACTERISTICS:

Knowledge of applicable coursework (e.g., accounting, economics, finance, engineering, statistics, mathematics); fractions & decimals; speech &/or oral communications; technical writing; agency policies & procedures (e.g., PUCO policies & procedures for utility rate case processing, rate case proceedings, & alternative regulation procedures)*; agency programs, operations & policies*; state & federal laws, regulations, guidelines & procedures governing utility industry (e.g., rate structure, costing methodology, financing & securities, or economics as applied to public utility companies)*. Skill in use of calculator, personal computer, appropriate spreadsheet & word processing software & related equipment. Ability to use research methods in gathering data; gather, collate & classify information about data, people or things; prepare technical reports following prescribed methods; handle sensitive inquiries from & contacts with officials & general public.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

Completion of associate core program or 12 mos. exp. in any combination of following academic areas (i.e., accounting, economics, statistics, business administration, finance, mathematics); 3 mos. trg. or 3 mos. exp. writing technical, business, legal or scientific reports; 1 course or 3 mos. exp. in application of mathematical, statistical or analytical methods used in formulating & solving problems or in decision making.

Note: upon successful completion of probationary period incumbents are to be reassigned to Utility Analyst 2, 66942; or be removed from this classification).

-Or equivalent of Minimum Class Qualifications For Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Not applicable.

CLASS TITLE: Utility Analyst 2	CLASS NUMBER: 66942	BARGAINING UNIT: 14
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EFFECTIVE DATE:

09/01/1996

JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

Independently gathers & analyzes information on accounting, economic &/or engineering issues related to regulation of gas, electric, telecommunications, water & sewer applications, (e.g., rate &/or tariff applications, alternative regulation applications, environmental compliance plan applications, utility long-range forecasts &/or integrated resource plans, energy issues &/or energy policy, alternative energy initiatives, &/or issues related to proposed new major electric & gas facilities in Ohio, prepares reports of findings &/or recommendations (e.g., interprets intra-agency financial reports, ratios & trends; reviews new & existing rate & tariff schedules to recommend &/or draft revisions; correlates, extends & refines data; prepares charts & graphs using personal computer; designs & develops methods of using computer financial data base model to aid in financial analysis; analyzes market trends in telecommunications services & in purchasing of fuel & power & evaluates legitimacy of purchases; determines companies' compliance with fuel adjustment clause legislation; analyzes utility companies' financial & operating data), reviews & analyzes various performance measures including, but not limited to, utility operating, financial, &/or organizational processes & structures for compliance with agency & legislative requirements.

Develops responses to requests for information from state & federal government personnel & industry pertaining to utility regulation (e.g., fuel cost adjustment, or gas cost recovery, rate of return, &/or financial positions of utility companies); prepares & presents testimony during regulatory proceedings; conducts investigations on variety of utility-related issues.

MAJOR WORKER CHARACTERISTICS:

Knowledge of mathematical/statistical decision making; state & federal laws, regulations, guidelines & procedures governing utility industry; agency policies & procedures (e.g., PUCO policies & procedures for utility rate case processing, rate case proceedings & alternative regulation procedures); applicable coursework (e.g., accounting, economics, finance, engineering, business administration; public administration, mathematics, statistics); technical or business writing; speech &/or oral communications. Skill in use of personal computer, appropriate spreadsheet & word processing software, calculator &/or related equipment*. Ability to use research methods in gathering data; conduct investigative interviews effectively; gather, collate & classify information about data, people or things; interpret extensive variety of technical materials in books, journals & manuals; develop complex reports & position papers; prepare & deliver speeches &/or testimony before professional & general audiences, prepare business correspondence.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

Completion of undergraduate core program or 24 mos. exp. in any one of following academic areas (i.e., accounting, economics, business administration, public administration, statistics, mathematics, finance); 3 courses or 9 mos. exp. in writing technical, business, legal or scientific reports; 2 courses or 6 mos. exp. in application of mathematical, statistical or analytical methods used in formulating & solving problems or in decision making; 1 course or 3 mos. exp. in speech or oral communication.

-Or 6 mos. exp. as Utility Analyst 1, 66941.

-Or equivalent of Minimum Class Qualifications For Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Not applicable.

CLASS TITLE: Utility Analyst Coordinator	CLASS NUMBER: 66943	BARGAINING UNIT: 14
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EFFECTIVE DATE:

09/01/1996

JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

Independently conducts research, investigations & analysis on accounting, economic &/or engineering issues in gas, electric, telecommunications, water & sewer applications (e.g., rate &/or tariff applications, alternative regulation applications, environmental compliance plan applications, utility long-range forecasts &/or integrated resource plans, energy issues &/or energy policy, alternative energy initiatives &/or issues related to proposed new major electric & gas facilities in Ohio); &/or acts as team leader or coordinator on technical projects to which other staff, regardless of classification are assigned (e.g., reviews applications & filings of utility companies seeking rate relief; analyzes financial conditions & economic conditions affecting companies; determines fair rate of return; writes power plant productivity section of investigation report; participates in analysis & research of economic need & technical issues related to proposed new major electric & gas facilities in Ohio; reviews & analyzes rate case applications, exhibits & other filings; analyzes tariffs & rate structures specifically as they relate to pending Ohio utility rate cases; determines significant issues in filings which have greatest impact on residential utility consumers & conducts special technical investigations from consumer complaints), prepares generic orders or acts as team leader by acting as coordinator for technical efforts by other staff, regardless of classification, engaged in analyzing applications for fuel cost adjustments &/or cost development, prepares written &/or oral reports of findings &/or recommendations, & reviews & analyzes various performance measures including, but not limited to, utility operating, financial, organizational processes & structures for compliance with agency & legislative requirements.

Prepares & presents written &/or oral testimony during regulatory proceedings (i.e., Public Utilities Commission &/or Ohio Power Siting Board) based on established staff policies & positions & sufficiency of those policies/positions for deciding issues raised & upholding staff position during cross examination by opposing parties in accordance with agency rules; provides technical expertise to other agency personnel or utility company officials; reviews pending legislation to prepare reports concerning effects of legislation upon assigned area of utility regulation.

MAJOR WORKER CHARACTERISTICS:

Knowledge of employee training & development*; state & federal laws, rules, regulations, guidelines & procedures governing utility industry; technical or business writing; applicable coursework (e.g., accounting, finance, public administration, business administration, economics, engineering, mathematics); agency policies & procedures (e.g., PUCO policies & procedures for review & submission of cases, rate design & rate &/or tariff schedules, finance & securities or economics as applies to utility companies); mathematical/statistical decision making; utility regulatory matters &/or case proceedings; cost recovery &/or cost adjustment & methods for designated area of utility; speech &/or oral communications. Skill in use of calculator, personal computer, appropriate spreadsheet & word processing software & related equipment*. Ability to deal with many variables & determine specific course of action; conduct investigative interviews effectively; prepare complex reports & position papers; prepare & deliver speeches &/or testimony before professional & general audiences; establish friendly atmosphere as lead worker/coordinator.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

Completion of undergraduate core program & 12 mos. exp. or 36 mos. exp. in one of following fields (e.g., accounting, finance, business administration, public administration, economics, engineering, mathematics); 6 mos. trg. or 6 mos. exp. in state & federal laws, regulations & procedures governing utility company operations; 6 mos. trg. or 6 mos. exp. in training in rate & or tariff schedules, financing & securities or economics as applied to utility companies; 6 mos. trg. or 6 mos. exp. & training in cost recovery &/or cost adjustment & methods & procedures for designated area of utility; 3 courses or 9 mos. exp. in application of mathematical, statistical or analytical methods used in formulating & solving problems or in decision making.

-Or 12 mos. exp. as Utility Analyst 2, 66942.

-Or equivalent of Minimum Class Qualifications For Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Not applicable.