

# Memorandum

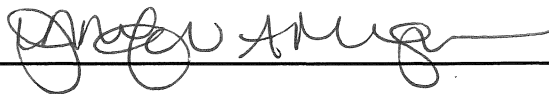
**TO:** HONORABLE MAYOR AND  
CITY COUNCIL

**FROM:** Jennifer Schembri  
Margaret McCahan

**SUBJECT: AMENDMENTS TO THE CITY  
PAY PLAN FOR VARIOUS  
CLASSIFICATIONS**

**DATE:** December 3, 2018

Approved



Date

12/6/18

## RECOMMENDATION

- (a) Adopt a resolution to amend the City of San José Pay Plan effective December 18, 2018, to:
- (1) Create the following classifications:
    - (a) Equipment Maintenance Supervisor II (3330) with a salary range of \$88,379.20 – \$107,827.20 annually;
    - (b) Power Resources Specialist I/II (5250/5251) with a salary range of \$78,104.00 – \$95,180.80 (I) and \$84,988.80 - \$103,542.40 (II) annually;
    - (c) Senior Power Resources Specialist (5253) with a salary range of \$106,121.60 – \$130,000.00 annually; and
    - (d) Principal Power Resources Specialist (5254) with a salary range of \$126,125.56 – \$157,655.91 annually.
  - (2) Retitle the following classifications:
    - (a) Equipment Maintenance Supervisor I (3327) (formerly Equipment Maintenance Supervisor) with a salary range of \$81,265.60 – \$99,091.20.
  - (b) Approve the following position changes to the Department of Community Energy:
    - (1) Delete 2.0 Senior Analyst positions;
    - (2) Add 1.0 Principal Power Resources Specialist; and
    - (3) Add 1.0 Power Resources Specialist I/II.

## OUTCOME

If the above recommendation is approved, the City of San José Pay Plan will be amended to create the following classifications: Equipment Maintenance Supervisor II (3330), Power Resources Specialist I/II (5250/5251), Senior Power Resources Specialist (5253), and Principal Power Resources Specialist (5254); the Equipment Maintenance Supervisor I (3327) classification will be retitled (formerly Equipment Maintenance Supervisor); and position

changes in the Department of Community Energy will better align with the work to be performed.

## **BACKGROUND**

The City of San José Pay Plan must be amended by Council Resolution when new job classifications are added or deleted, job titles are changed, or salaries are revised. The City Pay Plan reflects all job classification and compensation changes made through Council Resolution. The City Pay Plan is on file in the Human Resources Department and published on the City's Internet and Intranet sites.

## **ANALYSIS**

Following is a discussion of the Equipment Maintenance Supervisor I/II position and the Power Resources Specialist series, including a description of the positions and the recommended salary ranges. These classifications are also eligible to receive an approximate 5% ongoing non-pensionable increase as part of their base salary, as negotiated between the City and the Association of Maintenance Supervisory Personnel (AMSP) and City Association of Management Personnel (CAMP).

### **Equipment Maintenance Supervisor I/II**

The Human Resources Department is working with the Public Works Department to redesign the Mechanic series to assist in recruitment and retention efforts. Human Resources conducted a market study and found that the Equipment Maintenance Supervisor classification is under market. In order to maintain internal equity within the organization, Human Resources is proposing the same structure as the Wastewater Mechanical Supervisor I/II classification that was approved by Council on August 27, 2013. The proposed change to the Equipment Maintenance Supervisor I/II classification includes the addition of a flexibly-staffed level to align with the Wastewater Mechanical Supervisor I/II classification. The purpose of the additional flexibly-staffed level recognizes increasing job expertise, as shown by the additional certifications required, and to provide additional promotional opportunities for incumbents within this series.

The Administration is currently in discussions with the International Union of Operating Engineers, Local No. 3 (OE#3) to redesign the lower level Mechanic classifications, per the agreement that was approved by Council on October 23, 2018. Revisions to the Apprentice Mechanic, Mechanic, and Senior Mechanic classifications will be brought forward to Council at a later date.

Equipment Maintenance Supervisor I/II – with an annual salary range of \$81,265.60 – \$99,091.20 (I) and \$88,379.20 – \$107,827.20 (II): Performs supervisory work of considerable difficulty in the repair of mechanized equipment, the inspection, repair, and

installation of special automotive equipment, in the fabrication, modification, and welding of equipment and vehicles, and in monitoring outside contracts.

### Power Resources Specialist Series

The Human Resources Department worked with the Department of Community Energy to create a series of specialized classifications to provide oversight and execution of power supply contracts and services for the Department. The Community Energy Department has approximately \$300 million in power supply contracts and will begin the second (and larger) phase of the two-phase launch of the program in February 2019. This classification series specializes in energy resources planning, forecasting, procurement, and supply; demand-side analysis plans; energy risk management; scheduling and settlements; as well as ensuring compliance with federal, state, and local laws.

As part of the 2018-2019 Adopted Operating Budget, the Council approved 5.0 Senior Analyst positions in the Community Energy Department. After a full analysis, it was determined that a separate series should be created for some of these positions due to the specialized and technical nature of some of the work. In addition, Human Resources conducted a market study for this series and found that comparator agencies have more than one level within the series. The creation of this series will allow for promotional opportunities within the Department as appropriate for the assigned and budgeted duties. To ensure success of the program and attract the most competitive candidates, the salaries have been set to maintain the competitiveness of the market. With the addition of these new classifications, it is recommended to delete 2.0 Senior Analyst positions and add 1.0 Power Resource Specialist I/II and 1.0 Principal Power Resource Specialist.

Power Resources Specialist I/II – with an annual salary range of \$78,104.00 – \$95,180.80 (I) and \$84,988.80 - \$103,542.40 (II): Responsibilities include planning and supporting energy resource planning and procurement activities in support of the Community Energy Department, including supply and demand-side analysis, forecasting, contract negotiations, and review of California Independent System Operator (CAISO) scheduling and settlements. May assist in coordinating complex short and/or long-term projects or contracts.

Senior Power Resources Specialist – with an annual salary range of \$106,121.60 – \$130,000.00: Coordinates and plans complex energy resource planning and procurement activities in support of the Community Energy Department. Performs energy resources and supply and demand-side management analysis, energy risk management, forecasting, monitors, tracks and validates CAISO scheduling and settlements, and provides technical compliance with applicable federal, state, and local laws.

Principal Power Resources Specialist – with an annual salary range of \$126,125.56 – \$157,655.91: Manages and plans the activities of major technical projects or highly complex contracts within the Community Energy Department. Oversees the most complex and technical energy resource planning and procurement activities for the City between external agencies and private utilities; oversees scheduling and settlement with

the CAISO; and provides advanced level technical guidance to subordinate staff and contractors. Incumbents may serve in the absence of the Deputy Director, as required.

### **EVALUATION AND FOLLOW-UP**

No additional City Council action is expected following the adoption of the proposed resolution.

### **PUBLIC OUTREACH**

This memorandum will be posted on the City's website for the December 18, 2018, City Council Agenda.

### **COORDINATION**

This memorandum was coordinated with the Office of Employee Relations, the City Attorney's Office, the Public Works Department, and the Department of Community Energy.

### **COMMISSION RECOMMENDATION/INPUT**

Revisions to the Pay Plan for classified positions are reported to the Civil Service Commission for filing at the first regularly scheduled meeting following Council action.

### **COST SUMMARY/IMPLICATIONS**

The Public Works Department currently has 3.0 Equipment Maintenance Supervisor I positions. Currently, no incumbents have been identified to promote to the higher flexibly staffed level; however, it is anticipated that this classification will be used in the future. The maximum annualized cost (salary and fringe) is approximately \$54,000 if all three positions are promoted to the higher level. Any additional ongoing costs will be paid for by the Vehicle Maintenance and Operations Fund.

The Department of Community Energy currently has 2.0 vacant Senior Analysts positions that are recommended to be deleted, and 1.0 Principal Power Resources Specialist and 1.0 Power Resources Specialist I/II positions that are recommended to be added. These staffing changes will result in an additional cost (salary and fringe) of up to \$32,000 for the remainder of 2018–2019, which will be covered by vacancy savings in the San José Clean Energy Operating Fund. The additional ongoing cost of up to \$64,000 will be factored into the 2019–2020 Base Budget. A recommendation to add additional positions may be brought forward in a future budget process after the full program launch and an evaluation of resource needs.

HONORABLE MAYOR AND CITY COUNCIL

December 3, 2018

**Subject: Amendments to the City Pay Plan for Various Classifications**

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**CEQA**

Not a project, File No. PP10-068(b), Municipal Code, Title 3.



JENNIFER SCHEMBRI

Director of Employee Relations and  
Acting Director of Human Resources



MARGARET MCCAHAN

Budget Director

For questions, please contact Aracely Rodriguez, Employment Division Manager, at (408) 975-1411.

Attachments:

Equipment Maintenance Supervisor I/II Class Specification

Power Resources Specialist I/II Class Specification

Senior Power Resources Specialist Class Specification

Principal Power Resources Specialist Class Specification

**City of San José**  
**CLASS SPECIFICATION**

**Title: Equipment Maintenance Supervisor I/II (3327/3330)**

<b>DEPARTMENT</b>	<b>ACCOUNTABLE TO</b>	<b>FLSA STATUS</b>
Public Works	Fleet Manager	Non-exempt

**CLASS SUMMARY**

Under direction, performs supervisory work of considerable difficulty in the repair of mechanized equipment, the inspection, repair, and installation of special automotive equipment, in the fabrication, modification, and welding of equipment and vehicles, and in monitoring outside contracts. Performs related work as required.

**DISTINGUISHING CHARACTERISTICS**

This is a two level flexibly-staffed class and is the first supervisory level in the Mechanic series responsible for the supervision of employees engaged in the installation, modification, maintenance and repair of special equipment, automotive equipment, and heavy equipment and in monitoring contracts with outside vendors. Incumbents regularly work on tasks that are varied and complex, requiring considerable discretion and independent judgment. Positions in this classification rely on experience and judgment to ensure the efficient and effective functioning of the assigned operation/program area. Assignments are given with general guidelines and incumbents are responsible for establishing objectives, timelines, and methods to deliver services. Work is typically reviewed upon completion for soundness, appropriateness, and conformity to policy and requirements. This class differs from Senior Mechanic I/II in that it has full supervisory responsibility over one or more repair sites. It differs from Fleet Manager in that the latter has overall management responsibility for the Fleet and Equipment Services Division.

**QUALIFICATIONS**

(These qualifications are typically required. An equivalent combination of education and experience sufficient to satisfactorily perform the duties of the job may be substituted.)

**Minimum Qualifications**

**Equipment Maintenance Supervisor I**

**Education and Experience**

Completion of high school, General Educational Development (G.E.D.) Certificate, or California Proficiency Certificate AND four (4) years of experience in journey-level automotive and heavy equipment repair, machining, or metalworking.

**Acceptable Substitution**

Completion of an Associate's or Bachelor's degree from an accredited college or university may substitute for two (2) of the four (4) years of experience in journey-level automotive and heavy equipment repair, machining, or metalworking.

**Required Licensing (such as driver's license, certifications, etc.)**

- Possess and maintain a valid State of California driver's license.

**Equipment Maintenance Supervisor II**

**Education and Experience**

Completion of high school, General Educational Development (G.E.D.) Certificate, or California Proficiency Certificate AND four (4) years experience in journey-level automotive and heavy equipment repair, machining, or metalworking, including at least one (1) year of experience as an Equipment Maintenance Supervisor I.

**Acceptable Substitution**

**City of San José**  
**CLASS SPECIFICATION**

**Title: Equipment Maintenance Supervisor I/II (3327/3330)**

Completion of an Associate's or Bachelor's degree from an accredited college or university may substitute for two (2) of the four (4) years of experience in journey-level automotive and heavy equipment repair, machining, or metalworking.

**Required Licensing (such as driver's license, certifications, etc.)**

- Possess and maintain one of the following certifications: NAFA Fleet Management Association Maintenance Management Certification, OR NAFA Fleet Management Association Certified Automotive Fleet Manager, OR American Public Works Association (APWA) Certified Public Fleet Professional.

**Other Qualifications**

**(Incumbents may be required to have different combinations of the listed qualifications, or more specific job-related qualifications depending on the position.)**

**Basic Competencies**

**(Needed at entry into the job in order to perform the essential duties.)**

- Job Expertise – Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations, such as:
  - Repairs of mechanized equipment.
  - Safety laws, rules, practices and precautions for vehicles, equipment, and employees engaged in installations, modification, and repair.
  - Industry standards and practices as they relate to fleet management.
  - Local government budgeting process.
  - Reading and interpreting manufacturers' operating and service manuals.
  - Purchasing, maintaining, and controlling adequate inventories of supplies, equipment, parts and tools.
- Communication Skills - Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills and displays openness to other people's ideas and thoughts.
- Computer Skills - Experienced with common business computer applications including but not limited to: MS Outlook, MS Word, MS PowerPoint, MS Access, and MS Excel.
- Continuous Improvement - Actively identifies new areas for learning and regularly creates and takes advantage of learning opportunities.
- Decision Making - Identifies and understands issues, problems, and opportunities; uses effective approaches for choosing a course of action or developing appropriate solutions.
- Planning - Acts to align own unit's goals with the strategic direction of the organization; Defines tasks and milestones to achieve objectives, while ensuring the optimal use of resources to meet those objectives.
- Supervision - Sets effective long and short-term goals based on a good understanding of management practices; establishes realistic priorities within available resources; provides motivational support; empowers others; assigns decision-making and work functions to others in an appropriate manner to maximize organizational and individual effectiveness.

**City of San José**  
**CLASS SPECIFICATION**

**Title: Equipment Maintenance Supervisor I/II (3327/3330)**

- Team Work and Interpersonal Skills - Develops effective relationships with co-workers and supervisors by helping others accomplish tasks and using collaboration and conflict resolution skills.

**Additional Competencies and/or Desirable Qualifications**

**(Competencies, knowledge, skills and abilities that are more position specific and/or likely to contribute to more successful job performance.)**

Knowledge of:

- Welding, fabrication, and machine work.
- Labor rates, parts, and material costs.

Ability to:

- Read and interpret vehicle technical drawings.
- Obtain a City driving permit.
- Manage multiple projects and small contracts.
- Interpret automotive specifications and comprehensive reports.
- Manage a section budget.

The following certifications are highly desirable:

Equipment Maintenance Supervisor I

- Possession of a valid State of California Class A or B driver's license with applicable endorsements.
- NAFA Fleet Management Association Maintenance Management Certification.

Equipment Maintenance Supervisor II

- Possession of a valid State of California Class A or B driver's license with applicable endorsements.

<b>DUTY NO.</b>	<b>TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:</b>	<b>FREQUENCY*</b>
1.	Manages, leads, and ensures cost effective and timely preventive maintenance, repair and modifications of City-owned fleet assets; schedules, assigns, and evaluates work performed by staff and vendors; ensures completion of work with minimum downtime.	Daily
2.	Communicates continuously with staff, customers, and vendors on asset status; works closely with Fleet Management team to maintain and improve service delivery.	Daily
3.	Reviews work orders before closing to ensure completeness and accuracy such as the customer information, proper coding, comments of work performed, labor task codes used correctly, parts are charged, and commercial work is posted; ensures work orders are closed in a timely manner.	Daily
4.	Ensures compliance with safety standards and regulations at all City fleet shops and remote City locations with fleet service and repair activity; ensures employees use best practices and personal protective equipment at all times; coordinates safety workshops for fleet staff.	Daily



**City of San José**  
**CLASS SPECIFICATION**

**Title: Equipment Maintenance Supervisor I/II (3327/3330)**

<b>DUTY NO.</b>	<b>TYPICAL CLASS ESSENTIAL DUTIES:</b> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:	<b>FREQUENCY*</b>
5.	Ensures hazardous materials program is in compliance at all times, including but not limited to shop and facility records (both hardcopy and electronic), inspections, storage, disposal, staff training.	Daily
6.	Obtains and reviews estimates, inspection reports and invoices from vendors; coordinates and schedules commercial work at City and vendor locations.	Weekly
7.	Conducts periodic and timely review of vendor open purchase orders (OP) to ensure strict compliance with contracts and budgets; ensures parts processes are adhered to and within budget; maintains and updates vendor OPs with new or modified specifications when necessary; monitors and records vendor performance to ensure contract compliance and service delivery; works with Finance Department to address vendors not adhering to contracts.	Weekly
8.	Utilizes reporting resources for analyzing data and information for identifying trends, improvement opportunities and competitive service delivery.	Weekly
9.	Works with Fleet Management team to review, modify, develop and implement divisional operational policies and procedures.	Weekly
10.	Maintains tools, parts, shop equipment, and supplies utilizing approved City procurement methods; researches, analyzes and obtains tools critical for shop improved efficiencies and regulatory compliance.	As Required
11.	Ensures employee appraisals are current and administered with each employee reviewing accomplishments and targets for upcoming appraisal period; works with Office of Employee Relations to interpret and comply with established union agreements and City policies.	As Required
12.	Completes mechanical evaluations in a timely manner to prevent costly repairs and customer impacts.	As Required
13.	Works with Fleet Management team to identify staff training and resource needs; coordinate and track all necessary training.	As Required
14.	Participates in regional and national fleet management groups for benchmarking and staying current with best industry practices.	As Required
15.	Performs other related duties as assigned.	As Required

\*Frequency defined as Daily/Several Times, Daily, Weekly, Intermittent, or As Required

**PHYSICAL/ENVIRONMENTAL ELEMENTS**

The following is a general statement for the classification. Individual positions may have additional or different physical/environmental elements.

Possess ability to:

- Move between/within work areas, including but not limited to sitting, standing, and walking on various surfaces, turning, bending, grasping, and making repetitive hand movements;
- Communicate in person, in writing, and via various electronic mediums such as telephone, computer, radio, etc.;
- Maintain professional demeanor during interactions with staff, customers and the public.

City of San José  
**CLASS SPECIFICATION**

**Title: Equipment Maintenance Supervisor I/II (3327/3330)**

- Operate, access, enter, and retrieve data using standard office equipment, including but not limited to a computer or tablet;
- Read printed materials and a computer screen;
- Maintain strength, stamina, and mobility to perform medium to heavy physical work;
- Lift, carry, push, and pull materials and objects averaging a weight of 50 pounds, or heavier weights, in all cases with the use of proper equipment;
- Identify problems or hazards, work in confined spaces and around machines, and climb/descend ladders;
- Operate, inspect, and repair varied hand and power tools and construction equipment;
- Operate a motor vehicle and visit various City sites;
- Be exposed to unpredictable working conditions including but not limited to loud noise levels, cold and hot temperatures, inclement weather conditions, road hazards, vibration, confining workspace, chemicals, mechanical and/or electrical hazards, hazardous physical substances, fumes, dust, and air contaminants.

**CLASSIFICATION HISTORY** *Created 5/80, Rev. 3/83, Rev. 9/83, Rev. 6/86, Rev. 11/88, Rev. 8/89, Rev. 4/92, Rev. 4/98, Rev. and retitle 12/18; 3327s002*

City of San José  
**CLASS SPECIFICATION**

**Title: Power Resources Specialist I/II (5250/5251)**

<b>DEPARTMENT</b>	<b>ACCOUNTABLE TO</b>	<b>FLSA STATUS</b>
Community Energy	Varies	Exempt

**CLASS SUMMARY**

Under general supervision (Specialist I) or direction (Specialist II), plans and supports energy resource planning and procurement activities in support of the Community Energy Department, including supply and demand-side analysis, forecasting, contract negotiations, and review of California Independent System Operator (CAISO) scheduling and settlements. May assist in coordinating complex short and/or long-term projects or contracts. Performs related work as required.

**DISTINGUISHING CHARACTERISTICS**

This is the flexibly staffed entry/journey class in the Power Resources series, described as follows:

**Power Resources Specialist I** - This is the entry-level level class in the Power Resources series providing support for energy resource planning and procurement activities. Positions at this level are not expected to function with the same amount of knowledge or skill level as positions allocated to the Power Resources Specialist II level and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. As experience is gained, assignments become more varied and are performed with greater independence.

**Power Resources Specialist II** - This is the journey-level class in the Power Resources series responsible for performing the full range of professional support for energy resource planning and procurement activities. Incumbents are expected to work independently and exercise judgement and initiative. Positions in this classification rely on experience and judgment to ensure the efficient and effective functioning of the assigned project area. Assignments are given with general guidelines and oversight. This class is distinguished from the higher level class, Senior Power Resources Specialist, in that the latter class - may supervise lower level classifications and works on more complex projects with a broader scope.

**QUALIFICATIONS**

(These qualifications are typically required. An equivalent combination of education and experience sufficient to satisfactorily perform the duties of the job may be substituted.)

**Minimum Qualifications**

**Education and Experience**

***Power Resources Specialist I***

A Bachelor's degree from an accredited college or university in Business, Economics, Engineering, Environmental Studies, Law, Natural Resources, Statistics, or an analytical degree related field to utility business.

***Power Resources Specialist II***

A Bachelor's degree from an accredited college or university in Business, Economics, Engineering, Environmental Studies, Law, Natural Resources, Statistics, or an analytical degree related field to utility business AND one (1) year of experience in energy resources operations, planning, purchasing, scheduling, or contract negotiations.

**Acceptable Substitutions**

None

**Required Licensing (such as driver's license, certifications, etc.)**

**City of San José**  
**CLASS SPECIFICATION**

**Title: Power Resources Specialist I/II (5250/5251)**

Possession of a valid State of California driver's license may be required.

**Other Qualifications**

**(Incumbents may be required to have different combinations of the listed qualifications, or more specific job-related qualifications depending on the position.)**

**Basic Competencies**

**(Needed at entry into the job in order to perform the essential duties.)**

- Job Expertise – Demonstrates knowledge of applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations.
- Analytical Thinking – Approaches a problem or situation by using a logical, systematic, sequential approach.
- Collaboration – Develops networks and builds alliances; engages in cross-functional activities.
- Communication Skills – Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills and displays openness to other people's ideas and thoughts. Demonstrates basic knowledge of negotiation skills.
- Fiscal Management – Understands the relationship of the budget and resources to the strategic plan; complies with administrative controls over funds, contracts, and procurements.
- Initiative - Exhibits resourceful behaviors toward meeting job objectives; anticipates problems, is proactive, and avoids difficulties by planning ahead; displays willingness to assume extra responsibility and challenges; pursues continuing education opportunities that promotes job performance.
- Planning - Acts to align own unit's goals with the strategic direction of the organization; Defines tasks and milestones to achieve objectives, while ensuring the optimal use of resources to meet those objectives.

**Additional Competencies and/or Desirable Qualifications**

**(Competencies, knowledge, skills, and abilities that are more position specific and/or likely to contribute to more successful job performance.)**

- Political Skill – In taking action, demonstrates an understanding and consideration of how it will impact stakeholders and affected areas in the organization.
- Project Management – Ensures support for projects and implements agency goals and strategic objectives.
- Vision/Strategic Thinking – Supports, promotes, and ensures alignment with the organization's vision and values.

City of San José  
**CLASS SPECIFICATION**

**Title: Power Resources Specialist I/II (5250/5251)**

<b>DUTY NO.</b>	<b>TYPICAL CLASS ESSENTIAL DUTIES:</b> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to the following:	<b>FREQUENCY*</b>
1.	Supports and undertakes projects related to power forecasting, planning, procurement, and validation. Undertakes and approves energy purchases or sales of surplus energy, subject to the Risk Management Policies; supports tracking and validation of CAISO scheduling and settlements.	Daily/Several Times
2.	Plans and supports the negotiation and facilitation of energy resources contracts, services, and agreements; assists in preparing bids, specifications, and other supporting documentation; provides support to consultants and/or contractors.	Daily/Several Times
3.	Assists in providing quality assurance of programs and services; including evaluating and understanding the needs of the residents and City goals, objectives, and mandates.	Daily
4.	Assists in monitoring compliance with policy directives, federal, and state laws, rules and regulations, and local codes and standards; evaluates regulatory and legislative initiatives to ensure compliance with energy risk management policies.	Weekly
5.	Conducts studies, develops analytical models, system studies, and forecasting analyses and drafts recommendations related to energy resources planning, supply and demand, energy risk management, and forecasting.	Weekly
6.	Maintains and updates short and/or long-term operating and financial plans, including but not limited to developing cost, schedule, and tracking systems for projects.	Weekly
7.	May supervise or lead clerical or technical personnel in administrative support functions as assigned. Provides lead direction and training to support staff by assigning and reviewing feedback on tasks.	As Required
8.	Reviews bills for accuracy and participates in audits and analysis of power purchases and sale agreements.	As Required
9.	Assists in the preparation and monthly monitoring of the Department's budget, including revenue and expense forecasting.	As Required
10.	Supports and provides analysis of rate and cost of service studies.	As Required
11.	Performs other related duties as required.	As Required

\*Frequency defined as Daily/Several Times, Daily, Weekly, Intermittent, or As Required

**PHYSICAL/ENVIRONMENTAL ELEMENTS**

The following is a general statement for the classification. Individual positions may have additional or different physical/environmental elements.

In an office environment, possess ability to:

- Operate, access, enter, and retrieve data using standard office equipment, including but not limited to a computer or tablet;
- Read printed materials and a computer screen;
- Communicate in person and over the telephone;
- Lift, carry, push, and pull materials and objects up to 25 pounds, or heavier weights, in all cases with the use of proper equipment;

City of San José  
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**Title: Power Resources Specialist I/II (5250/5251)**

- Move between/within work areas, including but not limited to sitting, walking, and standing on various surfaces, turning, bending, grasping, and making repetitive hand movements;
- Be exposed to moderate noise levels and controlled temperature conditions;
- Maintain professional demeanor during interactions with staff, customers, and the public.

**CLASSIFICATION HISTORY** *Created 12/18; s000*

**City of San José**  
**CLASS SPECIFICATION**

**Title: Senior Power Resources Specialist (5253)**

<b>DEPARTMENT</b>	<b>ACCOUNTABLE TO</b>	<b>FLSA STATUS</b>
Community Energy	Varies	Exempt

**CLASS SUMMARY**

Under general direction, coordinates and plans complex energy resource planning and procurement activities in support of the Community Energy Department. Performs energy resources and supply and demand-side management analysis, energy risk management, forecasting, monitors, tracks and validates California Independent System Operator (CAISO) scheduling and settlements, and provides technical compliance with applicable federal, state, and local laws. Performs related work as required.

**DISTINGUISHING CHARACTERISTICS**

This is the second level class in the Power Resources Specialist series. Incumbent in this class perform complex energy planning, trading and scheduling functions in support of energy resources activities. This classification may provide guidance to energy purchasers and consultants in support of the Community Energy Department. Positions in this classification rely on experience and judgment to ensure the efficient and effective functioning of the assigned project area. This classification is distinguished from the higher level Principal Power Resources Specialist in that the latter class is a high level technical advisor and works on the most complex projects or contracts with the highest amount of risk. This classification is distinguished from the lower level Power Supply Resources Specialist in that they may supervise or lead the work of a higher level and the scope of projects they work on is broader and more complex in nature.

**QUALIFICATIONS**

**(These qualifications are typically required. An equivalent combination of education and experience sufficient to satisfactorily perform the duties of the job may be substituted.)**

**Minimum Qualifications**

**Education and Experience**

A Bachelor's degree from an accredited college or university in Business, Economics, Engineering, Environmental Studies, Law, Natural Resources, Statistics, or related field to utility business AND three (3) years of experience in energy resources operations, planning, purchasing, scheduling, or contract negotiations.

**Required Licensing (such as driver's license, certifications, etc.)**

Possession of a valid State of California driver's license may be required.

**Acceptable Substitution**

None

**Other Qualifications**

**(Incumbents may be required to have different combinations of the listed qualifications, or more specific job-related qualifications depending on the position.)**

**Basic Competencies**

**(Needed at entry into the job in order to perform the essential duties.)**

- Job Expertise – Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations, including but not limited to: energy management, which may include experience with: Electric Utilities, Electricity Generators or suppliers, California Independent System Operator (CAISO), California Public Utilities Commission,

**City of San José**  
**CLASS SPECIFICATION**

**Title: Senior Power Resources Specialist (5253)**

California Energy Commission, contract experience in power purchase agreements and/or the Edison Electric Institute agreement, and short-term Western Systems Power Pool (WSSP) transactions, knowledge of CAISO scheduling and settlements operations, knowledge of renewable, green-house gas-free and conventional electricity supplies and market knowledge.

- Analytical Thinking – Approaches a problem or situation by using a logical, systematic, sequential approach.
- Collaboration – Develops networks and builds alliances; engages in cross-functional activities.
- Communication Skills – Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills and displays openness to other people's ideas and thoughts.
- Fiscal Management – Demonstrates good financial management skills and understands complex energy procurement practices. Complies with applicable laws and policies including Energy Risk Management policies.
- Project Management – Ensures support for projects and implements agency goals and strategic objectives.
- Supervision – Sets effective long and short-term goals based on a good understanding of management practices; establishes realistic priorities within available resources; provides motivational support; empowers others; assigns decision-making and work functions to others in an appropriate manner to maximize organizational and individual effectiveness.

**Additional Competencies and/or Desirable Qualifications**

**(Competencies, knowledge, skills, and abilities that are more position specific and/or likely to contribute to more successful job performance.)**

- Political Skill – In taking action, demonstrates an understanding and consideration of how it will impact stakeholders and affected areas in the organization.
- Vision/Strategic Thinking – Supports, promotes, and ensures alignment with the organization's vision and values; understands how an organization must change in light of internal and external trends and influences; builds a shared vision with others and influences others to translate vision to action.

DUTY NO.	<b>TYPICAL CLASS ESSENTIAL DUTIES:</b> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to the following:	FREQUENCY*
1.	Undertakes projects related to power forecasting, planning, procurement, and validation. Undertakes and approves energy purchases or sales of surplus energy, subject to the Risk Management Policies; monitors, tracks and validates CAISO scheduling and settlements.	Daily/Several Times



**City of San José**  
**CLASS SPECIFICATION**

**Title: Senior Power Resources Specialist (5253)**

<b>DUTY NO.</b>	<b>TYPICAL CLASS ESSENTIAL DUTIES:</b> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to the following:	<b>FREQUENCY*</b>
2.	Coordinates and plans the negotiation of complex energy resource supply contracts, services, and agreements. Prepares scope, goals, outcome measures, schedules, and other supporting documentation; confirms rates and service terms; prepares bids and specifications; oversees consultant and contract agreements.	Daily/Several Times
3.	Collaborates and builds contacts with other organizations and representatives, regulatory agencies, and the public; ensures program compliance and makes recommendations to meet the needs of the public and City; may serve as a liaison to electric utility agencies, and regulatory bodies.	Daily
4.	Ensures compliance with policy directives, federal and state laws, rules and regulations, and local codes and standards; provides recommendations and assists in the coordination of organizational processes and policy revisions.	Daily
5.	Supervises subordinate staff to include: prioritizing and assigning work; conducting performance evaluations; ensuring staff are trained; and making hiring, termination, and disciplinary recommendations. Evaluates training needs and workload balance for staff and prepares plan for implementation. Serves as a resource and may provide guidance to contractors and consultants.	Daily
6.	Conducts studies, develops analytical models, system studies, and forecasting analyses, evaluates costs and benefits and prepares recommendations related to energy resources planning and procurement, supply and demand, energy risk management, and forecasting.	Weekly
7.	Oversees and conducts customer survey projects providing quality assurance of programs and services, including evaluating and understanding the needs of the residents and City goals, objectives, and mandates.	Weekly
8.	Monitors, tracks and validates CAISO scheduling and settlements; undertakes and approves energy purchases or sales of surplus energy, subject to the Risk Management Policies.	Weekly
9.	Develops short and/or long-term operating and financial plans related to developing cost, schedule, and tracking systems for projects.	Weekly
10.	Keeps abreast of power supply and energy developments and programs and evaluates opportunities for new sources or available technology.	Weekly
11.	Conducts audits on power purchases and sale agreements.	As Required
12.	Prepares reports and makes recommendations to management and the Community Advisory Committee.	As Required
13.	Assists in the preparation of the Department's budget, including revenue and expense forecasting and analysis and drafts budget proposals and reports.	As Required

**City of San José**  
**CLASS SPECIFICATION**

**Title: Senior Power Resources Specialist (5253)**

<b>DUTY NO.</b>	<b>TYPICAL CLASS ESSENTIAL DUTIES:</b> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to the following:	<b>FREQUENCY*</b>
14.	Conducts marked-to-market, rate and cost of service studies; benchmarks utility activities, services, and costs with comparator agencies and prepares recommendations based on comparator findings.	As Required
15.	May represent the Department and/or City at events or meetings.	As Required
16.	Performs other related duties as required.	As Required

\*Frequency defined as Daily/Several Times, Daily, Weekly, Intermittent, or As Required

**PHYSICAL/ENVIRONMENTAL ELEMENTS**

The following is a general statement for the classification. Individual positions may have additional or different physical/environmental elements.

In an office environment, possess ability to:

- Operate, access, enter, and retrieve data using standard office equipment, including but not limited to a computer or tablet;
- Read printed materials and a computer screen;
- Communicate in person and over the telephone;
- Lift, carry, push, and pull materials and objects up to 25 pounds, or heavier weights, in all cases with the use of proper equipment;
- Move between/within work areas, including but not limited to sitting, walking, and standing on various surfaces, turning, bending, grasping, and making repetitive hand movements;
- Be exposed to moderate noise levels and controlled temperature conditions;
- Maintain professional demeanor during interactions with staff, customers, and the public.

**CLASSIFICATION HISTORY** *Created 12/18; s000*

**City of San José**  
**CLASS SPECIFICATION**

**Title: Principal Power Resources Specialist (5254)**

<b>DEPARTMENT</b>	<b>ACCOUNTABLE TO</b>	<b>FLSA STATUS</b>
Community Energy	Deputy Director	Exempt

**CLASS SUMMARY**

Under administrative direction, manages and plans the activities of major technical projects or highly complex contracts within the Community Energy Department. Oversees the most complex and technical energy resource planning and procurement activities for the City between external agencies and private utilities; oversees scheduling and settlement with the California Independent System Operator (CAISO); provides advanced level technical guidance to subordinate staff and contractors; may serve in the absence of the Deputy Director as required. Performs related work as required.

**DISTINGUISHING CHARACTERISTICS**

This is the third level class in the Power Resources Specialist series. Incumbents in this class may act as an individual contributor, serving as a high level technical advisor on resource projects or contracts and/or manage the most complex short and/or long-term energy resources planning and procurement activities. Incumbents in this classification collaborate extensively with external agencies and private utilities. This classification requires extensive and in-depth knowledge of energy trading and scheduling and the federal, state, and local laws, regulations, and guidelines that govern them. This classification is distinguished from the lower level Senior Power Resources Specialist in that the latter classification does not act as a high level technical advisor on major projects or contracts, or manage the most complex negotiations, projects, or contracts that have the highest amount of risk for the City.

**QUALIFICATIONS**

**(These qualifications are typically required. An equivalent combination of education and experience sufficient to satisfactorily perform the duties of the job may be substituted.)**

**Minimum Qualifications**

**Education and Experience**

A Bachelor's degree from an accredited college or university in Business, Economics, Engineering, Environmental Studies, Law, Natural Resources, Statistics, or related field to utility business AND six (6) years of progressively responsible related experience overseeing and administering energy resources operations, planning, purchasing, scheduling, or contract negotiations. A Master's degree is highly desirable.

**Required Licensing (such as driver's license, certifications, etc.)**

Possession of a valid State of California driver's license may be required.

**Acceptable Substitution**

A Master's degree in a related field, may be substituted for up to two (2) years of the required experience. There is no substitution for the required Bachelor's degree.

**Other Qualifications**

**(Incumbents may be required to have different combinations of the listed qualifications, or more specific job-related qualifications depending on the position.)**

**Basic Competencies**

**(Needed at entry into the job in order to perform the essential duties.)**

- Job Expertise – Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations, including but not limited to: energy management,

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which may include experience with Electric Utilities, Electricity Generators or suppliers, California Independent System Operator (CAISO), California Public Utilities Commission, California Energy Commission, contract experience in power purchase agreements and/or the Edison Electric Institute agreement, and short-term Western Systems Power Pool (WSSP) transactions, knowledge of CAISO scheduling and settlements operations, knowledge of renewable, green-house gas-free and conventional electricity supplies and strong market knowledge.

- Analytical Thinking – Approaches a problem or situation by using a logical, systematic, sequential approach.
- Collaboration – Develops networks and builds alliances; engages in cross-functional activities.
- Communication Skills – Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills and displays openness to other people's ideas and thoughts.
- Fiscal Management – Demonstrates strong financial management skills and oversees complex energy procurement practices with large financial impacts for the organization. Complies with applicable laws and policies including Energy Risk Management policies.
- Leadership - Leads by example; demonstrates high ethical standards; remains visible and approachable and interacts with others on a regular basis; promotes a cooperative work environment, allowing others to learn from mistakes; provides motivational supports and direction.
- Political Skill – In taking action, demonstrates an understanding and consideration of how it will impact stakeholders and affected areas in the organization.
- Project Management – Ensures support for projects and implements agency goals and strategic objectives.
- Supervision – Sets effective long and short-term goals based on a good understanding of management practices; establishes realistic priorities within available resources; provides motivational support; empowers others; assigns decision-making and work functions to others in an appropriate manner to maximize organizational and individual effectiveness.
- Vision/Strategic Thinking – Supports, promotes, and ensures alignment with the organization's vision and values; understands how an organization must change in light of internal and external trends and influences; builds a shared vision with others and influences others to translate vision to action.

DUTY NO.	<b>TYPICAL CLASS ESSENTIAL DUTIES:</b> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to the following:	FREQUENCY*
1.	Oversees and undertakes complex projects related to power forecasting, planning, procurement, and validation. Undertakes and approves energy purchases or sales of surplus energy, subject to the Risk Management Policies; oversees CAISO scheduling and settlements.	Daily/Several Times

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**Title: Principal Power Resources Specialist (5254)**

<b>DUTY NO.</b>	<b>TYPICAL CLASS ESSENTIAL DUTIES: (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to the following:</b>	<b>FREQUENCY*</b>
2.	Manages and plans the activities of a major technical project or contract. Acts as a technical advisor on the most complicated projects and contracts.	Daily/Several Times
3.	Develops, manages, and directs the implementation of short and/or long-term operating financial plans related to energy portfolios and operations.	Daily/Several Times
4.	Manages and oversees the most financially complex and highest risk energy resource planning, contracting, negotiations, services, and agreements; resolves disputed provisions of existing contracts.	Daily/Several Times
5.	Collaborates and builds contacts with other organizations and representatives, regulatory agencies, and the public; represents the division and department to outside agencies and organizations; acts as a technical and professional resource providing support and assistance reflective of the City's concerns and interests.	Daily
6.	Recommends and monitors changes to organizational processes and policies to ensure compliance with energy market requirements, improve operations, mitigate risks, increase revenue, and decrease costs. Provides direction in the implementation of policies and procedures and ensures action plans are in support of department and City goals, objectives, and mandates.	Daily
7.	Supervises subordinate supervisory and other staff to include: prioritizing and assigning work; conducting performance evaluations; ensuring staff are trained; and making hiring, termination, and disciplinary recommendations. Evaluates training needs and workload balance for staff and prepares plan for implementation. Provides advanced technical guidance to contractors and consultants.	Daily
8.	Plans, implements, and evaluates department programs and initiatives as they are related to energy resource projects.	Daily
9.	Manages and conducts marked-to market, rate and cost of service studies. Benchmarks utility activities, services, and costs with comparator agencies and makes recommendations based on comparator findings.	Weekly
10.	Oversees and may perform the most complex studies, evaluates analytical and forecasting models and systems surveys; reviews and analyzes data, and prepares recommendations related to energy resources planning, supply and demand, energy risk management, CAISO scheduling and settlements, and forecasting.	Weekly
11.	Manages customer survey projects providing quality assurance of programs and services, including evaluating and understanding the needs of the residents and City goals, objectives, and mandates.	Weekly
12.	Presents reports and information to the City Council, boards, committees, and other divisions or departments.	Weekly
13.	Keeps abreast of power supply and energy developments and programs and evaluates opportunities for new sources or available technology.	Weekly
14.	Directs and coordinates audits on power purchases and sale agreements.	As Required

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<b>DUTY NO.</b>	<b>TYPICAL CLASS ESSENTIAL DUTIES:</b> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to the following:	<b>FREQUENCY*</b>
15.	Researches and prepares a variety of highly technical and administrative reports; prepares written correspondence on the more sensitive issues; prepares reports and presents at the City Council and commissions/committees periodically and upon request.	As Required
16.	Provides recommendations and coordinates preparation and monitoring of the Department's budget, including revenue and expense forecasting and analysis; prepares budget documents and reports.	As Required
17.	May act in the absence of the Deputy Director.	As Required
18.	Performs other related duties as required.	As Required

\*Frequency defined as Daily/Several Times, Daily, Weekly, Intermittent, or as Required

**PHYSICAL/ENVIRONMENTAL ELEMENTS**

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- Communicate in person and over the telephone;
- Lift, carry, push, and pull materials and objects up to 25 pounds, or heavier weights, in all cases with the use of proper equipment;
- Move between/within work areas, including but not limited to sitting, walking, and standing on various surfaces, turning, bending, grasping, and making repetitive hand movements;
- Be exposed to moderate noise levels and controlled temperature conditions;
- Maintain professional demeanor during interactions with staff, customers, and the public.

**CLASSIFICATION HISTORY** *Created 12/18; s000*