

**UTILITIES ANALYST 4**

**Nature of Work:** Under limited supervision, at the supervisory or technical expert level, performs at the advanced level, in supervising, such as planning, directing, and evaluating, the activities of a moderate size group of Utilities Analysts engaged in the examination of the financial books and records of various utilities requesting a rate change before the Public Service Commission, subject to ex parte contact rules of the Commission, or serves directly and not subject to ex parte contact rules as a technical expert, advising the Commission on a variety of highly technical regulatory issues, including new, emerging issues. The incumbent performing in the advisory capacity to the Commission is required to work independently, and with a minimum of direct supervision, formulate work plans on new issues as they arise. May be required to travel both in-state and out-of state. Performs related work as required.

**Distinguishing Characteristics:** The Utilities Analyst 4 will be assigned full responsibility for the most complex cases and be expected to fully carry out the duties necessary to protect the interest of all ratepayers. The Utilities Analyst 4 will follow one of two career paths, case processing staff or Commission advisory staff: 1) The incumbent involved in case processing supervises Utilities Analyst working on various types of cases; advises utilities analysts on proper work plans and/or procedures, recommends procedures to be followed in analyzing appropriate data related to new, unusual or unexpected issues arising in a case, and/or assumes responsibility for a particular area of the case previously assigned to another analyst, and is subject to ex parte contact rules; 2) The incumbent serving in an advisory capacity to the Commission and not subject to ex parte contact rules, provides technical expert advice and formulates independent recommendations on policy and matters before the Commission. Work at this level requires a great degree of knowledge, skill and ability in order to provide original research and advisory services on highly complex and technical issues. The advisory role also requires the incumbent to draw upon own expertise in analysis of issues, without the benefit of a large advisory unit or consultation with other Utilities Analysts.

**Examples of Work:****Examples of work performed by the Utilities Analyst 4 on the case processing staff:**

Plans, assigns, trains, and coordinates work of personnel engaged in complex technical, inspectional or instructional duties.

Reviews rate change requests submitted by utilities, classifies by type of utility and assigns to particular analyst(s); determines hours needed for completion and sets expected date of completion.

Advises Utilities Analysts on areas of concentration in preparing audit work plan; reviews and approves audit work plan.

Makes periodic visits to field audit sites to review audit progress and answers questions on complex accounting or tax problems; assures the timely completion of all audits assigned to the group.

Reviews completed audit report for compliance with Commission regulations and policies.

Advises subordinate analysts in the preparation of testimony and gives testimony in rate hearings.

Coordinates audit activities of the group with the legal, engineering, and other divisions of the Public Service Commission.

Advises the Commission on specifics of Federal requirements in the area of public utility regulations and assists the legal division in intervention before Federal regulatory agencies.

**UTILITIES ANALYST 4 - Cont'd.****Examples of work performed by the Utilities Analyst 4 on the Commission advisory staff:**

Advises Commission on a variety of highly technical regulatory issues, including new, emerging issues.

Evaluates reports, testimony and exhibits and makes independent recommendations regarding matters under the jurisdiction of the Commission.

Documents the results of analysis in written memoranda and reports that outline the issues evaluated and describes the results of the analysis.

Presents oral reports explaining the employee's analysis of financial, operational and other data.

Evaluates financial exhibits and makes independent recommendations regarding utility financial matters.

May provide advice to the Commission on specifics of Federal requirements in the area of public utility regulations and assists the legal division in intervention before Federal regulatory agencies.

Provides direction and assistance to lower level analysts performing work related to the Commission advisory function.

Plans, assigns, trains, and coordinates work of personnel engaged in complex technical, inspectional or instructional duties.

**Knowledge, Skills and Abilities:**

Knowledge of the principles and practices of accounting and auditing.

Knowledge of the rules and regulations of the Public Service Commission and the Federal regulatory agencies as they apply to the setting of tariffs for public utilities.

Knowledge of the rate-making processes and the rate structure of public utilities.

Ability to plan and direct the work of a moderate size group of Utility Analysts.

Ability to determine variances in complex economic and financial data.

Ability to prepare and present complex financial data as testimony in rate hearings.

Ability to communicate easily and clearly, in writing and orally.

Ability to maintain effective working relationships with others both within the Public Service Commission and outside.

**UTILITIES ANALYST 4 - Cont'd.**

**Minimum Qualifications:**

**Training:** Bachelor's degree from a regionally accredited four-year college or university with a major in business administration, accounting, finance, economics, or mathematics.

**Substitution:** Experience as described below may substitute for the required training on a year-for-year basis.

**Experience:** Six years of full-time or equivalent part-time paid employment in utility accounting, utility auditing, or financial and economic analysis with a public utility, regulatory agency or private accounting or consulting firm; or nine years of full-time or equivalent part-time paid employment in other areas of accounting or auditing.

**Substitution:** A Master's Degree in accounting, business administration, finance, economics, or mathematics, or approval as a Certified Public Accountant, may substitute for two years of the required experience.

**SPECIAL REQUIREMENT FOR ADVISORY ROLE POSITION:**

Experience with accounting or consulting firm must be related to public utility services.

**Established: 09/16/93**

**Title Change: 09/01/10**

**Revised: 09/01/10**

**Effective: 09/01/10**