CALIFORNIA ASSOCIATION OF
PROFESSIONAL SCIENTISTS

April 14, 2017

Steve Satake
CalHR, Labor Relations Division
1515 S Street, North Building, Suite 500
Sacramento, CA 95811

RE: Proposed Classification Change; Energy Specialist

Dear Mr. Satake,

CAPS continues to support updating and consolidating state scientific classifications as the principal means to making the state civil service more understandable and accessible to everyone it serves. We would like to see the Civil Service Improvement effort come to fruition before Governor Brown leaves office.

With that said the CalHR proposal for the "Energy Specialist" Series we received on April 10, 2017 misses the mark for CAPS, for State Scientists and for the public we serve.

I was surprised to receive these proposals from Pam Manwiller on your behalf. Recall that on January 19 you told me and the CAPS Bargaining Team that you had no responsibility for the classification reform effort, and that we should be meeting and discussing this with representatives of the Governmental Operations Agency. Now you want to have this proposal approved by the SPB within the next few days. After review, our conclusion is that this proposal is not ready for adoption.

Representatives from CAPS and CalHR, and subject matter experts from many state departments, spent countless hours during 2014 and 2015 jointly updating and consolidating Unit 10 classifications. That effort was discontinued when CalHR abruptly walked away from it. In spite of the lack of progress since then, we believe that the last iterations of that joint effort--as of June 2015—are more conducive to spirit and intent of the CSI Effort than your attached proposal.

Attached you will find your proposal with our initial comments, including color-coded comments for language we find objectionable, and for questions to which we seek answers.

I suggest that we meet to discuss the particulars, not just for this classification series, but for all state scientific classes. We prefer to return to a bilateral process where the best results can be developed collaboratively.

I look forward to hearing from you.

Sincerely,

Christopher J. Voight
Staff Director

C: Pam Manwiller, CalHR
Dave Rechs, GovOps
Suzanne Ambrose, State Personnel Board

CAPS AMENDMENTS LEGEND:

Underlined language: Language consistent with jointly agreed upon class changes from June 2015.

Orange highlight: Language CAPS finds objectionable.

Green highlight: Questions CAPS would like to see answered with explanations.

Energy Specialist Series Consolidation

Proposed classification consolidation change that affects the following Bargaining Unit 10 classes:

Current Classifications	Proposed Classifications
Energy Analyst	Energy Specialist, Range A
Associate Energy Specialist (Efficiency)	Energy Specialist, Range B
Associate Energy Specialist (Forecasting)	
Associate Energy Specialist (Technology Evaluation and Development)	
Energy Resources Specialist I	
Energy Commission Specialist I (Efficiency)	Senior Energy Specialist, Range A
Energy Commission Specialist I (Forecasting)	
Energy Commission Specialist I (Technology Evaluation and Development)	
Energy Commission Specialist II (Efficiency)	Senior Energy Specialist, Range B
Energy Commission Specialist II (Forecasting)	

Energy CommissionSpecialist II (Technology Evaluation and Development)	
Energy Commission Specialist III (Efficiency)	Principal Energy Specialist
Energy Commission Specialist III (Forecasting)	
Energy Commission Specialist III (Technology Evaluation and Development)	
Energy Resources Specialist II	None

Energy Specialist Series

California State Personnel Board Specification

Series established 06/01/2017

Salary Information

Class Code	Class Title	Probation Period Months
4933	Energy Specialist	12
4939	Senior Energy Specialist	12
4945	Principal Energy Specialist	12
4957	Energy Program Supervisor	12
4958	Energy Program Manager	12

CAPS objected to the change in title on June 19, 2015 due to the change in minimum qualifications. Unit 10 classes must remain professional *scientific* classes. The updated MQs allow non-scientists into the unit.

DESCRIPTION OF LEVELS

This five level classification series, including three rank and file, one supervisory and one managerial level is used to perform various consultative, analytical and research oriented assignments in energy- related topics. Assignments include, but are not limited to:

Previous version of this class contained two supervisory levels. Why the change?

- Energy efficiency;
- Program evaluation and planning;
- Policy review and formulation;
- Environmental impact assessment;
- Emergency energy planning;
- Energy use and system modeling;
- Data collection and analysis;
- Electricity and natural gas end use;
- Power and fuel production and storage;
- Transportation fuels and technologies;
- Energy system planning and management;
- Natural analysis and transportation fuel demand forecasting;
- Financing and contracting of energy and fuel projects including alternative resources; and
- Development and assessment of energy efficiency and clean energy programs and standards.
- Energy and Conservation practices;
- Forecasting;
- Facility planning and siting.

Language previously included. Why omitted?

Incumbents may perform generic and applied energy research and development, technology demonstration and deployment, and market facilitation in the areas of:

- Renewable energy sources such as solar, geothermal, biomass and wind;
- Advanced generation;
- Distributed energy sources;
- Energy and water efficiency;
- Climate change;

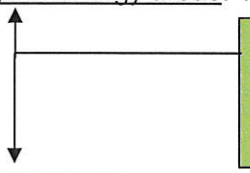
- Environmental science;
- Environmental effects of energy production, delivery and use;
- Resource recovery and alternate and renewable fuel sources for non-renewable energy sources;
- Alternate and renewable transportation fuels and technologies;
- Energy conversion and transmission technologies; and
- Grid management strategies and technologies, including energy storage.

Duties involve work on a broad range of energy and policy problems that may be interdisciplinary in nature including:

- Participate on or lead a team or task force;
- Work as coordinators, and/or contract managers;
- Conduct and/or review analytical studies and surveys;
- Act as representatives in sensitive intergovernmental negotiations;
- Coordinate the efforts of representatives of various governmental agencies;
- Provide education and outreach related to programs, regulations and policies;
- Develop, interpret, implement and enforce regulations, programs, and policies;
- Recommend actions and alternatives on a broad spectrum of energy- related problems; and
- Review and analyze proposed legislation and advice on the impact or potential impact of legislation.

Energy Specialist

Range A. At the entry and first working level, under close supervision, incumbents perform work of average difficulty in various consultative and analytical energy assignments; perform analytical work on one or more aspects in a broad range of energy areas. This level provides opportunity for advancement in the field of energy.



Language was previously included.

Energy Scientist Range B was previously the intermediate level. Why the change?

Range B. At the first journey level, under general supervision, incumbents perform complex varied, technical and analytical work. Positions at this level are nonsupervisory but may serve as lead over lower-level technical and analytical staff.

Senior Energy Specialist

Range A. At the full journey level, incumbents independently perform various complex responsible professional scientific work. This involves energy analysis, research, surveys, investigations, and studies; develop, lead and implement projects and programs; write reports; prepare regulatory and compliance documents; enforce laws and regulations; draft non-routine correspondence and answer non-routine questions from the public.

Range B. Incumbents serve as a prime resource and innovator in the most sensitive and complex energy-related subjects prone to rapid development. Incumbents independently identify problems, develop course of action, and conduct critical and/or sensitive scientific investigations and studies; provide guidance on highly complex technical problems that are extremely susceptible to high levels of legislative and media attention with multi-state impact; and may prepare guidance, policy, planning, or regulatory documents and legislative proposals on important issues. Provide consultative services to other departments and organizations. May act as a team lead over multi-functional areas inclusive of sensitive and highly visible/controversial projects; coordinate the efforts made on projects by various governmental

agency representatives.

Principal Energy Specialist

At the expert level, incumbents have the broadest and most advanced level of expertise. They act as a technical advisor on program and policy issues in energy- related scientific disciplines. Make policy recommendations to top administration officials. Lead or be the highest technical expert on large, sensitive or controversial reports or projects. May also act as a working team lead over a group of specialists. As the most highly skilled specialist, work independently and function as a subject-matter expert to formulate and develop solutions to extremely difficult energy- related problems. Incumbents exercise leadership roles and may coordinate the efforts of other analysts or researchers to accomplish department objectives.

Energy Program Supervisor

At the supervisor level, oversee staff that performs work on critical and sensitive energy- related programs. Incumbents exercise discretion on oversight and coordination of projects or programs and monitor timely completion of program objectives. Plan and assign projects; budget time and funds; review and evaluate achievements; prepare administrative reports; coordinate program activities with technical and administrative support sections; assist with the formulation and administration of policies; evaluate program performance and achievements; plan for work force needs; develop strategic plans; represent the organization during compliance negotiations, policy implementation and program budgeting.

Energy Program Manager

At the full management level, incumbents are accountable for the most complex and sensitive program issues with statewide impact; act as an expert on energy conservation practices, power and fuel production, energy modeling and forecasting; energy management, or financing and contracting of energy and fuel projects including alternative resources; establish policy and priorities; and provide strong leadership and direction toward the accomplishment of major program objectives. Incumbents plan, organize, and direct programs and resources; advise agency leads, Governor's Office, and other government agencies on energy policy issues; and represent the agency before the Legislature and general public.

COMPETENCIES

All Levels:

Knowledge of: Energy resource development; energy efficiency and conservation; principles of physical sciences and engineering that provide energy production, transmission, utilization and conservation; principles of statistical and econometric analysis; principles of program evaluation and planning, and energy policy analysis and formulation; data management collection and storage systems; broad knowledge of federal, state, local government, utilities and private entities involved in energy research and regulation; general provisions of federal and state laws and regulations applicable to the state's energy programs; recent research and development projects in the fields of renewable and non-renewable energy sources; principles and procedures of environmental impact assessment, and energy supply planning and demand forecasting.

Ability to: Reason logically and creatively, and utilize various analytical and research techniques to resolve complex energy conservation and development problems; develop and evaluate alternatives; analyze energy data and present ideas and information effectively both orally and in writing; consult with and advise Executive Management, Division Administrators, Commissioners and other interested members of the state energy community on various energy- related subjects; gain and maintain the confidence and

cooperation of those contacted during the course of work; analyze situations accurately and take effective action.

Senior Energy Specialist

Knowledge of: In addition to the above, should possess specific knowledge of California and federal energy and environmental regulatory and resource management laws, regulations, plans, programs, and policies relating to a program area; resource management practices and techniques; principles and practices of engineering and scientific analysis, environmental and land use impact analysis, socioeconomic impact analysis and project management.

Ability to: In addition to the above, develop scientific methodologies, research projects, criteria, procedures, guidelines, reference materials, planning and regulatory documents, and other innovative solutions for critical or sensitive energy-related problems; provide technical or project management support for time sensitive or high- priority projects; develop techniques for handling and analyzing a large variety of detailed data; effectively communicate the results and implications of studies to non- specialists; provide leadership in accomplishing basic functions and objectives in assigned programs; coordinate the work of others; participate on or lead a team or task force; coordinate the efforts of representatives of various governmental agencies; manage contracts; develop effective working relationships with internal and external stakeholders; testify as a subject matter expert before governing bodies.

Principal Energy Specialist

Knowledge of: In addition to the above, in-depth expertise in one or more specific program areas, technologies, and analytical and research methodologies; energy- related priorities of legislative and administrative branches of California and federal government; energy- related solutions and initiatives being pursued by other states, local agencies, and the federal government.

Ability to: In addition to the above, act as the state's highest-level technical subject matter expert in one or more specific program areas; provide a forum for the resolution of conflicts or disputes among implementing agencies; develop innovative solutions to difficult energy- related problems; evaluate program performance and achievements.

Energy Program Supervisor

Knowledge of: In addition to the knowledge required for the Senior Energy Specialist, performance management strategies; techniques for dispute resolution; principles and techniques of personnel management and supervision; budgeting and other administrative functions; training procedures; supervisor's responsibility for promoting equal opportunity in hiring and employee development and promotion, and for maintaining a work environment that is free of discrimination and harassment.

Ability to: In addition to the abilities required for the Senior Energy Specialist, manage, supervise, or administer program resources; make decisions regarding program milestones; train personnel; effectively supervise subordinate staff; plan, direct and coordinate the work of a multidisciplinary staff; appear at public hearings; and effectively promote equal opportunity in employment and maintain a work environment that is free of discrimination and harassment.

Energy Program Manager

Knowledge of: In addition to the knowledge required for the Energy Program Supervisor, the division's and organization's business, customers, and processes; strategies for resource management; basic fiscal and budgeting principles; leadership strategies and techniques; and best practices to recruit, select, develop and retain staff.

Ability to: In addition to the abilities required for the Energy Program Supervisor, provide appropriate and challenging assignments that build employees skills and knowledge; support, promote, and ensure alignment with the organization's vision and values; manage and encourage the processes of change and transition; influence others to translate vision into business plans and actions in alignment with the organization's strategic goals; translate objectives into specific measurable metrics and develop approaches necessary to achieve outcomes; negotiate with teams and across agencies to address mutual issues and concerns; create a positive work environment where goals and objectives are clear and ensure that those who are led work collaboratively to achieve results; inspire others to act and to continuously seek to learn; and achieve measurable and customer-driven results consistent with the organization's mission, goals, and objectives; and effectively contribute to the department's Equal Employment Opportunity program objectives.

MINIMUM QUALIFICATIONS

These Education requirements were previously under the heading "All levels." CAPS objects to this change as well as the addition of non-scientific degrees.

Energy Specialist

Education - Possession of a bachelor's degree or advanced degree from an accredited college or university with a major in biology, physics, economics, mathematics, statistics, environmental studies, chemistry, business administration, public policy, physical science, engineering, energy science, computer science or a closely related degree to the aforementioned. (Registration as a senior in an accredited college will admit applicants to the examination, but they must produce evidence of graduation or its equivalent before they can be considered eligible for appointment.)

These MQs have omitted Pattern I experience (creditable experience within state within state service). CAPS objects to this change.

Senior Energy Specialist

Education - All Levels Except Energy Specialist

Possession of a master's degree from an accredited college or university in the above-named disciplines may be substituted for two years of required general experience; possession of a doctoral degree from an accredited college in the above-named disciplines may be substituted for three years of required general experience. Only one postgraduate degree may be counted towards experience. **Or**

Two years of increasingly responsible professional experience in an energy-related field that includes at least one year where incumbents perform complex varied, technical and analytical work.

Principal Energy Specialist

Four years of increasingly responsible experience in an energy- related field, including two years where incumbents independently identify problems, develop course of action, and conduct critical and/or sensitive scientific investigations and studies.

Energy Program Supervisor

Five years of increasingly responsible professional experience in energy analysis, research, management, regulation, or investigation in multi-functional areas including two years of responsibility in the development or implementation of energy policies, programs, plans, or research projects; or conducting an energy monitoring and surveillance, enforcement, or energy management program.

Energy Program Manager

Seven years of increasingly responsible professional experience as a specialist in energy analysis, research, management, regulation, or investigation, two years of which have included responsibility in the development or implementation of energy policies, programs, plans, or research projects; or conducting an energy monitoring and surveillance, enforcement, or energy management program in multi-disciplinary functional areas.

PREFERRED OR DESIRABLE QUALIFICATIONS

All employees must have general qualifications as described by California Code of Regulations, title 2, section 172.

Class History

Class	Date Established	Date Revised	Title Change
Energy Specialist	**06/01/2017**		
Senior Energy Specialist	**06/01/2017**		
Principal Energy Specialist	**06/01/2017**		
Energy Program Supervisor	**06/01/2017**		
Energy Program Manager	**06/01/2017**		