

**LIVE, WORK,
EMPOWER SAN JOSE.**



**ENERGY FINANCIAL
PLANNING SPECIALIST –
Senior Power Resources Specialist**



THE ENERGY DEPARTMENT

San José Clean Energy, or SJCE, is San José's local, not-for-profit electricity supplier operated by the City of San José's Energy Department. Since 2019, our dedicated and motivated team has provided clean energy for residents and businesses at competitive rates, while also offering community programs, local benefits, and increased transparency and accessibility.

San José Clean Energy serves more than 350,000 customers and has a peak load of almost 1 GW. SJCE is responsible for purchasing over 4,500 GWh of electricity annually and has an annual operating budget of over \$300 million. Serving our community with respect and integrity is at the core of what we do. Joining our team means that you will be making a big impact and in the forefront in the fight against climate change. SJCE plays an important role in meeting San José's ambitious goal to be carbon neutral by 2030 and in implementing Climate Smart San José, the City's climate action plan.

SJCE centers equity in its drive to provide clean, renewable energy at competitive rates and provide local benefits. Since inception, SJCE has sprinted ahead to now provide 60% renewable and 95% carbon-free energy in our base product and has contracted to add over 550 MW of new solar, wind, and battery storage to the grid. SJCE's low carbon energy supply is foundational as we work to meet the electrification goals outlined in Climate Smart San José. For more information about San José Clean Energy, please visit: www.sanjosecleanenergy.org.

THE POSITION

The **Energy Financial Planning Specialist (Senior Power Resources Specialist)** will be responsible for assisting with the financial planning and forecasting functions for San José Clean Energy (SJCE). The incumbent in this position will perform a wide range of key responsibilities to analyze and track the department's energy resources financial forecasting and planning functions, including but not limited to the following:

- Complete analysis related to financial planning, forecasting.
- Complete analysis and assist with maintaining SJCE's financial proforma to forecast costs out 20 years to better align with SJCE's power portfolio, which currently totals more than \$3 billion. This will require working with senior management and consultants to select new software tools as the current forecast projects out 5 years only.
- Integrate complex energy market forecasts derived from multiple sources to analyze near- and long-term costs.
- Integrate the impact of short and long-term power purchase agreements, each with distinct start date, term, energy generation profile, and package of energy products being provided to SJCE in each agreement, on SJCE's financial forecast.
- Financial proforma analysis and forecasting for operational revenues totaling over \$500 million annually.
- Monitor and evaluate the financial impacts of PG&E rate changes and proposed changes which are updated throughout the year.
- Evaluate PG&E's regulatory filings and incorporate impacts on SJCE's financial forecasts.
- Perform complex analysis of revenue and expenditure projections.
- Serve as a technical and professional resource and support rate change implementation, including analysis, rate assessment and recommendations, memo writing preparation, and coordination with data services vendor.
- Participate in cost-benefit analysis of potential new Department programs.



THE IDEAL CANDIDATE

The ideal candidate will have utility industry and energy market knowledge and will understand the complexity of performing financial forecasting in a volatile and complex energy market that is heavily regulated. The ideal candidate should have strong analytical and proven experience in effectively multi-tasking, prioritizing, and planning activities to meet deadlines.

The ideal candidate will possess:

- Knowledge of energy markets, pricing trends, seasonal market dynamics, with a proven track record of cost reduction and portfolio performance improvements.
- Ability to work with various teams and external stakeholders and consultants to ensure the accuracy of long-range financial planning for SJCE.
- Expertise in understanding the intersection of the regulated environment with the complexities of being a single jurisdiction Community Choice Aggregator with municipal policies and procedures
- Experience with researching, compiling, analyzing, and evaluating general and statistical information and development of work products such as reports, policy statements, Council memos or presentations that effectively present complex energy financial information in a way that can be understood by non-technical audiences.
- Strong analytical skills, with a history of implementing data driven strategies to lower costs and improve portfolio performance.
- Proficiency in quantitative skills, statistical analysis, including complex spreadsheets, analytical platforms, and workload planning.
- Expertise with Microsoft Office (Word, PowerPoint, Planner) and other software tools.
- Advanced Excel expertise and experience with visualization tools such as PowerBI and Tableau.
- Knowledge of CPUC regulatory requirements impacting SJCE's portfolio.
- Knowledge of short & long-term resource plans; including integrated resource planning to develop an electric utility's resource needs to cost effectively meet electricity demand over the planning horizon.



The ideal candidate will possess the following competencies:

- **Job Expertise** – Demonstrates knowledge of and experience with applicable professional/technical principles, practices, Citywide and departmental procedures, policies, federal, state rules and regulations.
- **Leadership** - Leads by example; demonstrates high ethical standards; remains visible & approachable, interacts on a regular basis; promoting a cooperative work environment, allowing others to learn from mistakes; provides motivational supports and direction.
- **Collaboration** – Develops networks and builds alliances; engages in cross-functional activities.
- **Problem Solving** – Approaches situations or problem by defining the issue; determines the significance & priority, collects information from various sources; uses logic & intuition to make decisions and solution sets & outcomes.
- **Fiscal Management** – Understands the relationship of the budget and resources to the strategic plan; complies with administrative controls over funds, contracts, and procurements.
- **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.
- **Analytical Thinking** – Approaches problems or situations using a logical, systematic, sequential approach.
- **Project Management** - Ensures support for and drives projects, implements goals towards strategic objectives.
- **Communication Skills** – Effectively conveys information, expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills, displays openness to other's ideas and thoughts.

EDUCATION & EXPERIENCE

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

Experience: Three (3) years of progressively responsible related experience overseeing and administering energy resources operations, planning, purchasing, scheduling, or contract negotiations.

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

Employment Eligibility: Federal law requires employees to provide verification of their eligibility to work in the US. Please be informed the City of San José will NOT sponsor, represent or sign any documents related to visa applications/ transfers for H1-B or any other type of visa which requires an employer application.



THE CITY OF SAN JOSE

Known as the “Capital of Silicon Valley,” the City of San José plays a vital economic and cultural role anchoring the world’s leading region of innovation. Encompassing approximately 181 square miles at the southern tip of the San Francisco Bay, San José is Northern California’s largest city and the 12th largest city in the nation. With nearly one million residents, San José is one of the most diverse large cities in the United States. San José’s transformation into a global innovation center has resulted in one of the largest concentrations of technology companies and expertise in the world, including major tech headquarters like Cisco, Adobe, Zoom, Samsung, and eBay as well as start-ups and advanced manufacturing. The City of San José has twice been named “The Most Innovative Large City in America” by the Center for Digital Government.

San José’s quality of life is unsurpassed. Surrounded by the Diablo and Santa Cruz mountain ranges and enjoying an average of 300 days of sunshine a year, residents have easy access to the beaches along the California coast including Santa Cruz, Monterey, and Carmel; Yosemite and Lake Tahoe in the Sierra Nevada; local and Napa Valley wine country, and the rich cultural and recreational life of the entire Bay region.

San José has received accolades for its vibrant neighborhoods, healthy lifestyle, and diverse attractions from national media including Business Week and Money magazines. The downtown area is home to high-rise residential projects, theaters, museums, and diverse entertainment attractions such as live music and theater, cafes, restaurants, and nightclubs. Inquiring minds are served by the Tech Museum of Innovation, the San José Museum of Art, and many local galleries and venues. Nineteen public school districts and over 300 private and parochial schools provide residents with a range of educational choices. Universities in and near the city include San José State University, Santa Clara University, Stanford University, and three University of California campuses.

In 2011, the City adopted Envision San José 2040, a long-term growth plan that sets forth a vision and a comprehensive road map to guide the City’s anticipated growth through the year 2040. The Plan, which embodies the City’s “more urban future,” proactively directs significant anticipated growth in new homes and workplaces into transit-accessible, infill growth areas and supports evolution toward a more urban landscape and lifestyle. The San José area is powered by one of the most highly educated and productive populations in America. More than 40% of the workforce has a bachelor’s degree or higher, compared with 25% nationally. Forty percent of San José residents are foreign born, and 50% speak a language other than English at home.

San José is proud of its rich cultural diversity and global connections, and the essential role the City plays in connecting residents and businesses to the nation and the world.

THE CITY GOVERNMENT

The City of San José is a full-service Charter City and operates under a Council-Manager form of government. The City Council consists of ten (10) council members elected by district and a mayor elected at large. The City Manager, who reports to the Council, and the executive team provide strategic leadership that supports the policy-making role of the Mayor and the City Council and motivates and challenges the organization to deliver high-quality services that meet the community's needs. Department heads, including the Director of Energy, are appointed by the City Manager with confirmation by the City Council.

The City actively engages with members of the community through Council-appointed boards and commissions. In addition to providing a full range of municipal services, including police and fire, San José operates an airport, a municipal water system, a regional wastewater treatment facility, over 200 neighborhood and regional parks, and a library system with 25 branches. The City also oversees convention, cultural, and hospitality facilities that include the San José McEnery Convention Center, Center for the Performing Arts, California Theater, Mexican Heritage Plaza, and the SAP Center San José – home of the National Hockey League San José Sharks.

City operations are supported by 7,033 full-time equivalent positions and a total operating and capital budget of \$5.2 billion (for the 2023-24

fiscal year). San José is dedicated to maintaining the highest fiscal integrity and earning high credit ratings to ensure the consistent delivery of quality services to the community. Extensive information regarding San José can be found on the City website at

www.sanjoseca.gov.



COMPENSATION & BENEFITS

The **Energy Financial Planning Specialist (Senior Power Resources Specialist)** salary range is currently **\$135,211-\$165,635**; placement within this range will be dependent upon the qualifications and experience of the individual selected. This salary includes an approximate five percent (5%) ongoing non-pensionable compensation. The salary is supplemented by an attractive benefits package that includes, but is not limited to:

- **Retirement** – The City has its own competitive defined benefit retirement plan separate from and with full reciprocity with CalPERS.
- **Health Insurance** – The City contributes 90% towards the premium for the lowest-priced non-deductible plan. Several plan options are available.
- **Dental Insurance** – The City contributes 100% of the premium of the lowest-priced plan for dental coverage.
- **Personal Time** – Vacation is accrued initially at the rate of three weeks per year, with amounts increasing up to five weeks after 15 years of service. Vacation accrual may be adjusted for successful candidates with prior public service to reflect a vacation accrual rate commensurate with total years of public service. Executive Leave of 48 hours is granted annually and, depending upon success in the Management Performance Program, could increase to up to 80 hours. Sick Leave is accrued at the rate of approximately 8 hours per month.
- **Holidays** – The City observes 16 paid holidays annually.
- **Deferred Compensation** – The City offers an optional 457(b) plan.

- **Flexible Spending Accounts** – The City participates in Dependent Care Assistance and Medical Reimbursement Programs.
- **Insurance** – The City provides a term life insurance policy equal to two times annual salary. Long-term disability and AD&D plans are optional.
- **Employee Assistance Program (EAP)** – The City provides a comprehensive range of services through its EAP.
- **Parental Leave Program** – The City has a City-Paid Parental Leave program for which the incumbent in this position would be eligible. The program provides up to 320 hours of City-paid leave and are able to use up to 120 hours of their sick leave balances for the birth or placement of a new child, all of which must be used no later than 12 months from the birth or placement of the child.



Health Benefits - <https://www.sanjoseca.gov/your-government/departments-offices/human-resources/benefits>

IMPORTANT INFORMATION

Form 700 Filing: Upon commencement of employment and subsequently each spring, the incumbent of this position must file the Family Gift Reporting Form together with the Statement of Economic Interest-Form 700. Please view the following link for details related to the State-Required reporting: Form 700 (ca.gov) and the following link for the City of San José Family Gift Reporting Form.

APPLICATION PROCESS

This position is open until filled. First review of applications will take place on February 20, 2024. To apply for this outstanding opportunity, please submit a cover letter with current organization chart, resume (with months/years of employment and size of staff and budgets managed) via e-mail to:

Zoë McChesney
Energy Department
City of San Jose

Email: zoe.mcchesney@sanjoseca.gov

Resumes will be screened in relation to the criteria outlined in the brochure and candidates with the most relevant qualifications will be invited to preliminary screening interviews for further consideration. Qualified applicants will be contacted and scheduled for interviews. Candidates will be advised of their status of the recruitment following the selection of the **Energy Financial Planning Specialist (Senior Power Resources Specialist)**. If you have any questions regarding this exciting opportunity, please do not hesitate to contact Zoë McChesney at zoe.mcchesney@sanjoseca.gov. Successful completion of a thorough background investigation prior to employment is required. The City of San José is an equal opportunity employer encouraging workforce diversity.