



## Enrollment and Incentive Analysis Job Profile

<b>Job Family:</b> Enrollment and Incentive Analysis <b>Department:</b> Operations <b>Function:</b> Customer Care <b>Reports to:</b> Supervisor or Manager	<b>Last Updated:</b> April 2011
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<b>Job Summary</b>	Manage the implementation of energy efficiency measures from customer/vendor application initiation to incentive payment. Manage through tracking and monitoring milestone/project progress or program eligibility requirements. Influence actions and decisions to help move applications to paid status and maintain customer database tracking systems. Provide quality assurance reviews; responsible for validating program eligibility, incentive amounts, incentive calculations, availability of funds, and arranging inspections as required. Projects have a distinct beginning and end and usually correspond to the energy efficiency program cycles. There are typically no direct reports; rather people and other resources and stakeholders are coordinated throughout a project.		
<b>Major Responsibilities</b>	<ul style="list-style-type: none"> <li><b>PROJECT MANAGEMENT:</b> Manage the turnaround times for each step in the process of validating incentive amounts. Ensure the implementation of program guidelines, program scope and program objectives. Responsible for policies and procedures adherence by vendors and customers. Coordinate directly with customers/ vendors to resolve escalated issues arising from complex and/ or higher dollar value applications. Obtain commitment on incentive payments per project, resources and communication plans. Obtain management approval of payment of project incentives as needed. Manage special, infrequent activities (e.g., end-of-year rebate program changes, California Solar Initiative Step Changes, end-of-year 1099s, escheatment).</li> <li><b>ENERGY EFFICIENCY SUBJECT MATTER EXPERT:</b> Responsible for eligibility of project measures and adherence to regulatory guidelines and standards when determining energy savings/incentive amounts. Responsible to identify, analyze, and address all application/project issues. Responsible to adhere to program guidelines in the development of projects. Identify and communicate lessons learned and best practices. Participate in regulatory measurement and verification audits and data request activities as needed.</li> <li><b>PROJECT DOCUMENTATION:</b> Ensure that proper project documentation is maintained and tracked in applicable databases (CSI, MDSS, etc) and files to be used for reporting purposes and for regulatory evaluation and measurement audits.</li> </ul>		
<b>Job Title</b>	<b>Incentive and Enrollment Analyst, Associate</b>	<b>Incentive and Enrollment Analyst</b>	<b>Incentive and Enrollment Analyst, Senior</b>
<b>Position Title</b>	Incentive and Enrollment Analyst, Associate	Incentive and Enrollment Analyst	Incentive and Enrollment Analyst, Senior
<b>PGE Job Level</b>	Associate	Career	Senior
<b>SAP Job Code</b>	50419614	50419615	50419616
<b>Distinguishing Characteristics</b>	<ul style="list-style-type: none"> <li>Basic understanding of program policies and procedures</li> <li>Manage the common and routine applications for which work steps and timelines are routine and well established.</li> <li>Provide routine application status updates and reports as required or requested</li> <li>Maintain application status updates in database and project files used for regulatory reporting</li> <li>Basic understanding of systems used to complete applications by Processors</li> <li>Perform standard review, quality assurance and authorization of payments for applications completed by Processors</li> <li>Work with customers, vendors and/ or program management to resolve escalated application issues</li> <li>Escalate issues not easily resolved</li> <li>Identify and communicate systems issues</li> </ul>	<ul style="list-style-type: none"> <li>Full understanding of program policies and procedures with the ability to interpret policies &amp; procedures and program requirements</li> <li>Full understanding of systems used to process applications</li> <li>Manage moderate to complex applications that require knowledge of concepts or practices in a specific field or area of expertise of energy efficiency in various Residential, Industrial, Agricultural or Commercial sectors.</li> <li>Advise customers/vendors on program options, costs and benefits, timelines and incentive amounts accordingly. May participate in discussions at customer meetings with regards to program guidelines or preferred ways to fill out applications</li> <li>Provide quality assurance management of applications and incentive payments by ensuring regulatory compliance, program requirements, and incentive calculation and/or payment accuracy.</li> <li>Validate project incentive payments and initiate pre and post field inspection verifications</li> <li>Maintain project status updates in database and project files used for regulatory</li> </ul>	<ul style="list-style-type: none"> <li>Manage the day to day assignment and completion of work for a group of up to 25 Processors and Enrollment and Incentive Analysts (Employees and/or Agency Workers) based on supervisor direction</li> <li>May provide direction and mentor Enrollment and Incentive Analysts and Associates</li> <li>Advanced knowledge of program policies, procedures and requirements</li> <li>Advanced knowledge of systems used to process applications</li> <li>Manage complex applications that require knowledge of concepts or practices in a specific field or area of expertise of energy efficiency in various Residential, Industrial, Agricultural or Commercial sectors.</li> <li>Applies and adapts project management techniques and regulatory guidelines to assist customers and vendors in understanding the various energy efficiency programs and help them manage their energy use through energy efficiency</li> <li>Provide quality assurance management of applications and incentive payments by ensuring regulatory compliance, program requirements,</li> </ul>



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	<ul style="list-style-type: none"> <li>• Work with IT and/ or Products to resolve systems issues</li> <li>• Participate in process improvement projects</li> <li>• Determine feasibility of implementing technology solutions or business process changes</li> <li>• May train others to complete processing work</li> <li>• Assist other Enrollment and Incentive Analysts on other projects as directed</li> </ul>	<ul style="list-style-type: none"> <li>• reporting and forecasting</li> <li>• Manage special, infrequent but recurring activities that, if not administered correctly, could impact large amounts of customers</li> <li>• Identify roadblocks, determine and implement solutions to ensure department metrics are met</li> <li>• Initiate and lead efforts with internal and external partners to resolve program issues</li> <li>• Review daily production errors by individual, and report variances to the Sr. Enrollment and Incentive Analyst and Supervisor with possible cause and potential solutions</li> <li>• Assist other Enrollment and Incentive Analysts and Associates in using established processes, practices and procedures to field customer related inquiries</li> <li>• May provide training to staff on specialized expertise in the programs supported by the department</li> <li>• Communicate with peers inside and outside of the department, providing or exchanging information to support the programs</li> <li>• Participate in requirements gathering and systems user acceptance testing</li> <li>• Review and approve training materials</li> <li>• Handle escalated issues</li> <li>• Back up Senior Enrollment and Incentive Analyst as necessary</li> </ul>	<ul style="list-style-type: none"> <li>• and incentive calculation and/or payment accuracy</li> <li>• Participates in regulatory evaluations and internal audits</li> <li>• Maintain application status updates in various databases used for regulatory reporting, forecasting, and industry reporting</li> <li>• Present analysis, findings and recommendations to functional management and to management of customer organizations</li> <li>• Create and use best practices to develop recommendations related to operations</li> <li>• Initiate and lead cross-functional process and systems improvement initiatives</li> <li>• May provide training to staff on specialized expertise in the programs supported by the department</li> <li>• Review and sign off on requirements gathering and user acceptance testing for systems enhancements</li> <li>• Ensure policies and procedures and desk guides are updated and maintained and ensure the staff is following most current versions</li> <li>• Assist Supervisor in interviewing and on-boarding of new Employees and Agency Workers</li> <li>• Proactively monitor for and report to Supervisor fitness for duty, ergonomic safety, driving safety and environmental safety hazards</li> <li>• Backup Supervisor as necessary</li> </ul>
<b>Supervisory Responsibility</b>	No supervisory responsibility	No supervisory responsibility	May provide direction and coaching to other Enrollment and Incentive Analysts and Associates
<b>Education</b>	BA/BS or equivalent experience	BA/BS or equivalent experience	BA/BS or equivalent experience
<b>License/Certification</b>	NA	NA	LSS Green Belt desired
<b>Experience</b>	Desired: 1 year related experience	Required: 2 years related experience Desired: specific functional area experience	Required: 4 years related experience Desired: specific functional area experience
<b>Knowledge, Skills, and Abilities</b>	<ul style="list-style-type: none"> <li>• Business computer skills such as MS Office Suite (Excel, Word, Project, Visio)</li> <li>• Oral and written communication skills</li> <li>• Ability to handle multiple assignments and prioritize</li> <li>• Analytical/problem resolution skills</li> </ul>	<p>In addition to those for Associate, Career requires:</p> <ul style="list-style-type: none"> <li>• Ability to train team members in subject expertise, program guidelines and policies.</li> <li>• Knowledge of projects, program and regulatory requirements</li> <li>• Ability to lead project meetings</li> <li>• Ability to perform data analysis and understand data points affecting business results</li> <li>• Projects require basic knowledge of concepts, principles or practices in a specific discipline, field or area of expertise</li> </ul>	<p>In addition to those for Career, Senior requires:</p> <ul style="list-style-type: none"> <li>• Ability to lead team meetings</li> <li>• Thorough knowledge of application, program and regulatory requirements</li> <li>• Ability to train team members in subject expertise, program guidelines and policies.</li> <li>• Knowledge and application of incentive calculation tools and techniques.</li> <li>• Some applications require extensive knowledge of concepts, principles or practices in a specific discipline, field or area of expertise in industry</li> </ul>



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		and energy efficiency
<b>Working Conditions</b>	Incumbents work in an office environment. Less than 10% travel may be required.	
<b>Supplemental Information</b>	NA	

Technical Competencies	Technical Competency Descriptions	Proficiency Level*		
		Associate	Career	Senior
<b>Project Management Skills</b>	Effectively structures and controls work on a project; integrates all aspects, ensures that work progresses on schedule and that work meets specification or required standard. Plans the organizational aspects, communications, procurement, requirements gathering, quality standards, staffing, and risk identification associated with a project (including cost, time, effort, etc. estimates). Understands the activities and processes involved in defining the scope of a project and managing the project planning effort. Understands audit and oversight functions and the impact of QA Reviews and Inspection on the Project.	Novice	Proficient	Advanced
<b>Coordinating &amp; Scheduling</b>	Effectively coordinates activities, services, and schedules to ensure smooth and efficient operation of work.	Novice	Proficient	Advanced
<b>Financial and Business Results</b>	Manages expense budget, while achieving consistent and appropriate levels of service. Demonstrates understanding about how businesses work and of trends and practices affecting the Company;	Novice	Proficient	Advanced
<b>Quality Assurance</b>	Diligently attends to details and quality; shows a high level of care and thoroughness in handling the details of the job; maintains focus and quality under distracting working conditions and high workload.	Novice	Proficient	Advanced
<b>Resourcefulness</b>	Finds ways to get the job done even when normal channels, materials, and methods don't work.	Novice	Proficient	Advanced
<b>Communication Management</b>	Manages communication activities to ensure all communication pieces clearly and accurately describe information in common, understandable terms and are consistent with company guidelines, policies, and procedures.	Novice	Proficient	Advanced
<b>Resource Management</b>	Manages time, money, and resources necessary to meet the business needs.	Novice	Proficient	Advanced
<b>Proactive Problem Solving</b>	Anticipates, identifies and mitigates potential customer issues before they escalate into a significant problem.	Novice	Proficient	Advanced
<b>Project Management Tools</b>	Understands and uses the hard tools (e.g. project management software, MDSS and Active Project Reports, Forecasting) and soft tools (e.g. how to facilitate startup meetings) to manage project activities. Specific applications may include: Microsoft Word, Excel, Access, Project, PowerPoint; Issue Management, Risk Management, Scope Management.	Novice	Proficient	Advanced
<b>Program Policies and Procedures</b>	Understands how the CPUC regulations impact our program designs. Able to collaborate and draft polices and procedures to process improve our effectiveness in processing the project applications to payment.	Novice	Proficient	Advanced