Silicon Valley Clean Energy Authority
Executive Committee Meeting
Thursday, July 7, 2016
3:00 pm
West Conference Room
456 W. Olive Ave.
Sunnyvale, CA

AGENDA

Call to Order

Roll Call

Public Comment on Matters Not Listed on the Agenda

The public may provide comments on any item not on the Agenda. Speakers are limited to 3 minutes each.

Regular Calendar

1) Regular Meeting Time and Date for Executive Committee (Discussion and Action)

2) Executive Committee Chair and Vice Chair (Action)

3) Office Space Criteria (Discussion)

4) Staffing Plan (Discussion)

5) Job Classifications for Initial Hiring (September – December 2016) (Discussion)

6) Benefit package (Discussion)

Adjourn

Pursuant to the Americans with Disabilities Act, if you need special assistance in this meeting, please contact the Clerk for the Authority at (408) 730-7483. Notification 48 hours prior to the meeting will enable the Authority to make reasonable arrangements to ensure accessibility to this meeting. (28 CFR 35.105 ADA Title II).
To: SVCEA Executive Committee

From: Tom Habashi, CEO

Item 1: Approve Ongoing Meeting Date and Time for Executive Committee

Date: 7/7/2016

RECOMMENDATION

Identify and approve an ongoing meeting date and time for Executive Committee meetings.

BACKGROUND & DISCUSSION

In June 2016, the SVCEA Board approved the formation of the Executive Committee with the role of advising the CEO and Board on matters pertaining to the operations of SVCEA. The approved role of the Executive Committee is advisory to the Board unless and until the Board directs or delegates specific decision making authority to the Committee, such as delegating final approval of a professional services agreement to the Committee.

Counsel has advised that the Executive Committee would need to establish an ongoing meeting date and time should the Board direct a role for the Committee beyond its current advisory scope, such as delegating final approval of a matter to the Committee. In order to provide for that possibility and to provide for efficient and reliable Committee meeting organization, staff recommends that an ongoing time and date be identified.

Once identified by the Committee, the date and time would be submitted to the Board for approval by resolution or amendment to the Operating Rules and Regulations.
Staff Report – Item 2

To: SVCEA Executive Committee

From: Tom Habashi, CEO

Item 2: Chair and Vice Chair for Executive Committee

Date: 7/7/2016

RECOMMENDATION

Establish a Chair and Vice Chair of the Executive Committee to preside over committee meetings.

BACKGROUND & DISCUSSION

As an appointed ongoing committee of the SVCEA Board of Directors, Executive Committee meetings are public meetings subject to the Board Act. Counsel has advised that a chair and vice chair are not explicitly required for the Committee but are a recommended practice for such a body. Staff recommends that the Committee appoint a chair and vice chair to preside over its meetings.
To: SVCEA Executive Committee

From: Tom Habashi, CEO

Item 3: Office Space Criteria

Date: 7/7/2016

SUMMARY

Staff proposes that the following criteria be used to identify a commercial office space to house the operations of SVCEA:

- Size to range between 5500-7500 sq. ft. to accommodate 20-24 employees
- Close proximity to train station, located in one of the member agencies
- Central to Service area with easy access to customers
- Require little, or no renovation prior to occupation
- Provides suitable security for customer service and data management
- Preferably is LEED certified

ANALYSIS & DISCUSSION

With an anticipated staff team of 20-24 personnel, staff estimates that 5500 sq. ft. should be sufficient to house SVCEA’s operations using an open concept office space. If a larger office space at a reasonable rate is available, staff recommends a board room to accommodate Board and committee meetings. An additional 2000 sq. ft. of office space may be required for that purpose.

Given the high cost of living in the Silicon Valley, we should expect that many of SVCEA’s employees may commute to work. Finding an office close to the train station can considerably shorten the time that employees spend commuting and avoid vehicle trips, thus offering both an employee benefit and a reduction in greenhouse gas emissions.

It is important to have SVCEA offices in close proximity to customer centers. This should reduce the distance that customers, contractors and vendors must drive to reach SVCEA offices. In addition, the Authority marketing staff should be able to easily reach key commercial customers to address any concerns that may arise.
With the commencement of service only nine months, it is important that we find offices in nearly move-in condition. Based on recent conversation with local commercial real estate agents, it is likely that in the best of circumstances that we would have to wait 4-6 months for space design, painting, carpet replacement and the occupation permit process to move in. An older office requiring more effort would shift our staff focus from launching SVCEA service at a time when it is most needed.

The motivation for forming SVCEA is to reduce community GHG emissions. In further support of that objective, moving to a building that’s LEED certified will promote and reinforce that objective with customers, employees, and stakeholders. Also, it is crucial that we safeguard customer data, requiring emphasis on secured office space.

Staff proposes that we use the above criteria to begin the search for office space for SVCEA and that we bring a recommended lease to the Board of Directors at their August meeting.
Staff Report – Item 4

To: SVCEA Executive Committee

From: Tom Habashi, CEO

Item 4: Staffing Plan

Date: 7/7/2016

BACKGROUND

In May 2016, the SVCEA Board hired the first employee for SVCEA, the Chief Executive Officer. SVCEA is currently staffed through a combination of local member agency staff and consultant support under contract to SVCEA and directed by the CEO. As SVCEA achieves critical milestones and nears the implementation phase, it is in a position to hire permanent staff in order to sustainably meet the core needs of the operations.

ANALYSIS & DISCUSSION

Staff, with support from LEAN Energy US, has developed a proposed framework for SVCEA’s organization, functional roles, and the phased onboarding of personnel. The team evaluated the organizational structures of the operating programs in Marin and Sonoma and considered the following in developing the proposed approach for SVCEA:

- Efficient staffing with minimal organization layers that encourages teamwork across work groups
- Emphasis on building the Marketing and Public Affairs team early to support program launch, with first customer notices scheduled for January 2017
- Flexible timing of onboarding positions to adapt to program needs and recruitment outcomes

The full organization is currently proposed to be 20 personnel. Additional temporary positions may be added to address spikes in service needs, such as for community engagement. The proposed staffing level provides for full launch of initial operations but does not include staffing that would be needed to implement energy efficiency programming. Expanding SVCEA’s services to include enhanced energy efficiency programming is envisioned to be proposed after the first year of operations.

ATTACHMENTS

1. SVCEA Key Functions by Department
2. SVCEA Organization Chart
3. SVCEA Phased Staffing Plan
SVCEA Organization Chart – Key Functions By Department

Board of Directors

Chief Executive Officer

Administration & Finance
- Board Secretary/CEO
- Admin Support
- Board & Committee support
- Finance & Budget
- Human Resources
- IT/Office Management
- Receptionist/phones
- Various vendor and contract management
- Other general administration

Marketing & Public Affairs
- Agency Branding, Marketing & Graphic Design
- Community Outreach & Programs
- Web/Social Media
- Press Relations
- Data Mgmt and Call Center Oversight
- Customer Enrollment
- Key Accounts management and customer service

Power Resources & Energy Programs
- Power Supply Contracting
- Integrated Resource Planning
- Power Scheduling/CAISO interface
- Rate Design
- Compliance & Reporting
- Energy Programs (EE, NEM, FiT, etc.)

Legal & Government Affairs
- General Counsel
- Regulatory Proceedings
- Statewide Legislative & Regulatory Affairs

Revised: 6/30/16
## SVCEA - Staff Phasing Plan - Proposed

<table>
<thead>
<tr>
<th>Position</th>
<th>Group 1 September-December 2016</th>
<th>Group 2 January-May 2017</th>
<th>Group 3 June-December 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chief Executive Officer</td>
<td>Complete</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board Clerk/CEO Administrative Assistant</td>
<td>New Hire</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Director of Administration and Finance</td>
<td></td>
<td>New Hire</td>
<td></td>
</tr>
<tr>
<td>Finance Manager</td>
<td></td>
<td>New Hire</td>
<td></td>
</tr>
<tr>
<td>Human Resources Manager</td>
<td>Contract</td>
<td>Contract</td>
<td>New Hire</td>
</tr>
<tr>
<td>Administrative Analyst (2)</td>
<td>New Hire</td>
<td>New Hire</td>
<td>New Hire</td>
</tr>
<tr>
<td>Administrative Assistant</td>
<td></td>
<td></td>
<td>New Hire</td>
</tr>
<tr>
<td>Director of Marketing &amp; Public Affairs</td>
<td>New Hire</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community Outreach Manager</td>
<td></td>
<td>New Hire</td>
<td></td>
</tr>
<tr>
<td>Account Services Manager</td>
<td>New Hire</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account Representative I/II</td>
<td>New Hire</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Community Outreach Specialist (2)</td>
<td>New Hire</td>
<td>New Hire</td>
<td>New Hire</td>
</tr>
<tr>
<td>Director of Power Resources &amp; Energy Programs</td>
<td>Contract</td>
<td>New Hire</td>
<td></td>
</tr>
<tr>
<td>Contracts and Compliance Specialist</td>
<td>Contract</td>
<td>Contract</td>
<td>New Hire</td>
</tr>
<tr>
<td>Resource Planning and Programs Analyst (2)</td>
<td>Contract</td>
<td>New Hire</td>
<td>New Hire</td>
</tr>
<tr>
<td>General Counsel &amp; Director of Government Affairs</td>
<td>Contract</td>
<td>Contract</td>
<td>New Hire</td>
</tr>
<tr>
<td>Regulatory/Legislative Analyst</td>
<td>Contract</td>
<td>Contract</td>
<td>New Hire</td>
</tr>
<tr>
<td><strong>Total New Hires:</strong></td>
<td><strong>5</strong></td>
<td><strong>7</strong></td>
<td><strong>7</strong></td>
</tr>
<tr>
<td><strong>Existing Staff:</strong></td>
<td><strong>1</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Staff:</strong></td>
<td><strong>20</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
DRAFT 1: JOB DESCRIPTION
BOARD CLERK / EXECUTIVE ASSISTANT TO THE CEO

Summary
Under general supervision, to perform a wide variety of responsible and technical office support to Silicon Valley Clean Energy (SVCE); to provide support and follow-up to the Board of Directors and related Committees on a variety of matters; provide Executive Assistant support to the Chief Executive Officer; to assist in the management of official SVCE records and minutes; and to perform related work as required.

Job Description
The SVCE Board Clerk/Executive Assistant to the CEO provides administrative support to Board Directors and SVCE staff in the preparation and maintenance of public records and interaction with public officials. The incumbent may also assist with the composition of resolutions, staff reports, and other official SVCE documents. In addition, the Board Clerk/Executive Assistant to the CEO will establish, set, maintain, present, and distribute agendas and Board meeting material and respond to inquiries from Board members and the public. The position is also responsible for coordinating Board-related meetings as needed and maintaining records of Board actions taken. The Board Clerk/Executive Assistant to the CEO also provides assistance as needed in an Executive Assistant role to support the Chief Executive Officer including meeting coordination and management of verbal and electronic correspondence. Assignments are performed with general supervision and within an identifiable and prescribed framework.

This classification is a first point of public contact for SVCE and requires frequent interaction with SVCE officials, community members, vendors and the public regarding official SVCE Board of Directors issues, such as public meetings, agenda items, and general operations. In addition, the incumbent must exercise initiative, discretion, and good judgment in the analysis and resolution of issues that require technical or specialized knowledge of SVCE organization, policy, and procedures. This role also requires the ability to support the Chief Executive Officer in a variety of administrative duties as requested by management staff or members of the Board.

Supervisory Responsibilities
This position has no supervisory responsibilities.

Essential Duties and Responsibilities (Illustrative Only)

- Prepare draft agenda from material submitted by staff; develop and collate final agenda with supplemental material for distribution
- Review supporting documents for agenda items, screening for discrepancies, ensuring materials are relevant and appropriately processed in accordance with legal requirements and SVCE procedures
- Prepare and distribute meeting materials for Regular Board meetings, Special Board meetings, as well as various Board Committee meetings
- Record and prepare minutes at the Board of Directors meetings, including recording the essential content of discussion, motions and votes, transcribing notes and checking draft copies of minutes for appropriate grammar, technical terminology, spelling, and sentence structure
- Answer public inquiries in person, by phone, and by email, and route inquiries as necessary to appropriate SVCE staff
- Prepare resolutions and staff reports as necessary
- Interface with general counsel regarding meeting legal requirements including for public noticing and the Brown Act
• Post and update meeting materials and Board-approved documents on SVCE’s website as needed
• Take appropriate follow-up action on the Board’s decisions, such as notifying interested parties on specific items, securing required signatures, or finalizing documents for official filing
• Maintain records of Board actions, including but not limited to minutes and resolutions
• Provide SVCE Board Directors, committees, and staff with logistical support for meetings, presentations, and events, including all logistical agency meeting and event coordination (such as location, room reservations, amenities, and materials)
• Ensure collection and filing of annual Form 700 submittals from SVCE Board members as well as designated staff and consultants
• File applicable amendments to governing documents with the State of California when needed
• Ensure maintenance of Board-related records according to SVCE rules and policies
• Research, compile, and organize information and official records for use by Board members, SVCE staff, and the public
• Assemble, check, verify, compile and review data
• Provide direct support for Executive Officer on administrative tasks as needed
• Perform routine tasks including duplicating, photocopying, and assembling bulk mailing
• Retain and recall information to respond to inquiries and effectively search files and retrieve data as required
• Work closely with administrative personnel to maintain office supplies and meet the needs of SVCE Board members and staff
• Maintain relationships with Board member jurisdiction officials in order to facilitate the flow of documents from county, city and town jurisdictions to SVCE

Minimum Qualifications
To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required.

Experience/Education
Any combination of education and experience that would provide the knowledge and abilities listed. Typically, equivalent to possession of an Associate of Arts degree in business administration or related field, and four (4) years of responsible clerical experience, which has included considerable exercise of initiative, attention to detail, and independent judgment.

Knowledge of
• Modern technology, systems, and software designed to assist in the computerized management of information
• Data processing applications and systems, and the principles of modern office management
• Principles of office administration and secretarial practices and procedures, including business correspondence, correct English usage, grammar, spelling, vocabulary, and punctuation
• Records management principles and practices, and research methods and techniques
• Business mathematics and financial record keeping and report production
• Customer service practices, principles, and techniques for dealing with the public in person and over the telephone regarding sensitive and/or confidential issues

Ability to
• Develop a thorough knowledge of the role, organization, policies, and procedures of the Board of Directors and SVCE
• Learn, interpret, and explain rules and regulations and policies
• Perform technical and responsible office administrative, working independently and accurately
• Identify and secure confidential, highly sensitive records and written or verbally communicated information, and record such information accurately
• Retain and recall information to respond to inquiries, and efficiently search files and retrieve data as required
• Organize, plan, and prioritize own workload and adjust to changes in workload and assignments to meet critical deadlines under pressure
• Problem solve, compile and analyze data, and use sound judgment
• Establish and maintain effective working relationships with those encountered during performance of duties
• Type at a rate sufficient to perform assigned duties
• Use database, spreadsheet, and web interface and/or internet applications depending on assignment
• Communicate effectively in English, both verbally and in written form, sufficient to convey information and instructions to the public and other employees in situations requiring tact, courtesy, and poise
• Understand information requests of others and respond courteously, efficiently, and accurately

Willingness to
• Work occasional overtime or on weekends and evenings

Working Conditions
The physical demands described here are representative of those required for the position. Position requires sitting, walking, standing, bending, and twisting in the performance of daily activities. The position requires hand manipulation and repetitive hand movement and fine coordination in using a computer keyboard. The position requires near and far vision in reading reports and use of a computer. Acute hearing is required in supporting meetings and providing phone and in-person customer service. The position occasionally requires lifting and/or moving objects up to 20 pounds. SVCE will make reasonable accommodation of the known physical or mental limitations of a qualified applicant with a disability upon request.

Licenses/Certificates:
Possession and continued maintenance of a valid class C California driver’s license or the ability to provide alternate transportation as approved by the CEO and a safe driving record.
Summary
The Director of Marketing & Public Affairs works under the general direction of the Chief Executive Officer to oversee development, management and implementation of programs that communicate, promote and market Silicon Valley Clean Energy (SVCE) and its programs and services. The Director of Marketing & Public Affairs directs, manages, and supervises SVCE’s Marketing and Public Affairs team, which is responsible for customer relations, account and billing services; business and community development; and public marketing and communications. The Director of Marketing & Public Affairs is also responsible for oversight of and collaboration with external consultants that support this function.

Job Description
The Director of Marketing & Public Affairs is responsible for directing and working collaboratively with internal staff and external consultants to guide, support and implement SVCE’s brand strategy in customer service, business and community development, public outreach and communications, as well as across all SVCE internal departments. The Director of Marketing & Public Affairs identifies strategies to increase overall engagement and participation of the community and is responsible for reputation management. The Director of Marketing & Public Affairs oversees and provides guidance for customer enrollments; customer retention; earned, owned, and paid media; community outreach; account management; billing resolution; publicity and media relations. The Director of Marketing & Public Affairs ensures that key, strategic messages are communicated effectively to target audiences and directs customer account management, customer relations and customer retention strategies. The Director of Marketing & Public Affairs manages and coordinates outside consultants retained to provide services such as call center and billing services, website services, graphics, writing, advertising, and other related work and is also responsible for communications-related budget preparation and tracking. The Director of Marketing & Public Affairs and his/her team represents SVCE to outside organizations and agencies, supports local events and makes presentations to community, elected and professional groups, Board of Directors, and staff.

Supervisory Responsibilities
The Director of Marketing & Public Affairs manages the supervision of internal marketing and public affairs staff. The incumbent also provides oversight for external marketing communications strategy, call center and data management consultants, and other external professional service providers supporting the division.

Essential Duties and Responsibilities (Illustrative Only)

Supervisory Duties
- Plans and prepares for Marketing and Public Affairs staff recruitment and recommends the appointment of personnel
- Plans, directs, and coordinates the goals and workplan for the Marketing and Public Affairs team
- Assigns work activities, projects and programs; monitors workflow; reviews and evaluates work products, methods, and procedures; meets with staff to resolve related issues
- Conducts performance evaluations, implements performance correction as needed, trains and coaches staff in work procedures
- Evaluates data to determine success of Marketing and Public Affairs team towards reaching agency goals

Internal Communications
• Updates SVCE CEO and Board of Directors on customer service, marketing, communications, and public relations progress, projects and programs
• Provides talking points and information to CEO, Board of Directors and staff to utilize for external and internal meetings and presentations

Marketing Communications
• Provides direction, guidance and review, in collaboration with staff and consultants, to plan and execute strategic marketing campaigns, collateral and promotional material that support business and community development goals
• Provides direction, guidance and review of community outreach plans and business development plans to increase customer acquisition, encourage participation in various programs, and support customer retention
• Collaborates with staff and consultants to maintain website design, capabilities, and content
• Writes and reviews press releases, feature articles and other materials for newspaper, magazines and related venues
• Develops and maintains relationships with print, radio and television media, community groups and organizations, business leaders, and other public agencies and governmental representatives
• Oversees SVCE-sponsored social media (e.g. Facebook and Twitter) and e-newsletter distribution, event and sponsorship opportunities and SVCE sponsored press conferences and events
• Develops strategies and implementation plans to respond to media inquiries and publicity, including misinformation campaigns
• Serves as SVCE’s spokesperson with the media as needed

Customer Account & Billing Services
• Oversees resolution of billing issues, customer complaints, and technical issues that impact customers
• Oversees functions of the call center and data manager to improve and streamline customer service
• Acts as an agency liaison to local governments and community based organizations

Minimum Qualifications

Experience/Education

Education and experience equivalent to a Bachelor’s Degree in communications, public administration, environmental planning, business, marketing or a related field and at least six (6) years of progressively responsible experience in a supervisory or management role in the field of public affairs. Experience working for a public utility or a Community Choice Aggregation program is desirable.

Knowledge of:
• The organization of local government and concepts of public administration
• The history of Community Choice Aggregation legislation and implementation in California
• Principles, techniques and methods of public information, integrated marketing communication, community and media relations and public education
• Methods, operational characteristics, services, and activities necessary for effective community outreach.
• Public policy process, local and regional government and environmental issues
• Principles and practices of public speaking, public presentations and event planning
• Principles of management, supervision, training and performance evaluation
• Techniques and methods of preparing and reviewing information, news release and information materials including graphics and written copy
- Principles, practices and methods of writing, publishing, and disseminating a variety of informational materials; of graphic design, photography, and printing
- Microsoft Office Suite, Adobe Illustrator, Adobe InDesign, Adobe Photoshop, and Adobe Acrobat as well as web development tools such as Joomla, Dreamweaver and/or HTML
- E-mail marketing platforms such as Constant Contact
- Research and statistical methods as applied to the collection, tabulation and analysis of data

**Ability to:**
- Take responsibility and work independently, as well as coordinate collaborative efforts and achieve work goals with and through first line supervisors
- Convey complex information in a simple and understandable manner
- Manage multiple priorities, meet deadlines, and quickly adapt to changing priorities in a fast paced dynamic environment
- Achieve goals and provide accurate, timely, and meaningful progress updates
- Work well under pressure
- Be thorough and detail-oriented
- Demonstrate patience, tact, and courtesy
- Identify and solve problems effectively and expeditiously
- Establish and maintain effective working relationships with persons encountered during the performance of duties
- Direct, supervise and coordinate the work of assigned staff
- Communicate effectively verbally, in writing, and through presentations
- Make effective and dynamic presentations to community groups, governmental bodies and the SVCE Board and staff to achieve desired results
- Exercise sound judgment, creative problem solving, effective dispute resolution, and commercial awareness
- Provide excellent customer service and communicate clearly and effectively with customers
- Understand, anticipate, and appreciate customer needs and concerns

**Working Conditions**
The physical demands described here are representative of those required for the position. Position requires sitting, walking, standing, bending, and twisting in the performance of daily activities. The position requires hand manipulation and repetitive hand movement and fine coordination in using a computer keyboard. The position requires near and far vision in reading reports and use of a computer. Acute hearing is required in supporting meetings and providing phone and in-person customer service. The position occasionally requires lifting and/or moving objects up to 20 pounds. SVCE will make reasonable accommodation of the known physical or mental limitations of a qualified applicant with a disability upon request.

**Licenses/Certificates:**
Possession and continued maintenance of a valid class C California driver's license or the ability to provide alternate transportation as approved by the CEO and a safe driving record.
Summary

The Account Services Manager works under direction from the Director of Marketing & Public Affairs and has responsibility for a wide range of account related issues, including customer service and program operations & development. This position will work with internal team members, Pacific Gas and Electric Company (PG&E), and the designated data management and call center service provider to ensure customer satisfaction and to address systemic issues as they arise. The Account Services Manager will develop and maintain SVCE programs and ensure their proper integration with PG&E to meet customer needs and SVCE objectives.

Job Description

The Account Services Manager is the lead customer care representative for SVCE, providing oversight for customer account management and administrating customer programs under the general supervision of the Director of Marketing & Public Affairs. This job serves as the lead point of interaction between PG&E, SVCE and the data management and call center service provider(s) to identify and resolve issues related to SVCE and/or PG&E tariffs, program designs and business operations. In addition to administration of existing customer programs, this role may require modification and development of new programs to better serve customers. The Account Services Manager will also work directly with SVCE customers as an Account Manager for strategic accounts and will participate in community events or perform related tasks as needed.

Supervisory Responsibilities

This position provides support and direction to Account Representatives and other staff on account or program-related issues.

Essential Duties and Responsibilities (Illustrative Only)

- Interface and maintain business relationship with SVCE call center and PG&E representatives to ensure consistent and effective interaction with customers.
- Supervise development and integration between SVCE and PG&E of programs and services including but not limited to:
  - Net Energy Metering
  - Foreign language billing
  - Bill design
  - Balanced Payment Plan
  - Account-level opt outs
- Conduct and maintain monthly “Issues List” monthly meetings with PG&E which address deficiencies in the service PG&E provides to SVCE customers.
- Identify, advocate for and implement solutions to any deficiencies in the service PG&E provides to SVCE customers.
- Provide training and materials on SVCE operations to PG&E staff as-needed.
- Manage strategic accounts, including large commercial and municipal customers, including providing cost comparisons and program guidance.
- Identify and implement solutions to increase customer retention and customer satisfaction with SVCE services.
• Track opt-outs and respond to any customer issues that may be causing opt-outs, including collaboration with other SVCE departments to provide effective programs, services, and communications.
• Identify and resolve high-level customer billing issues.
• Provide expertise on demand response options and services as needed.
• Maintain rate models for cost comparison and other analytical purposes.
• Provide data analysis support as needed.
• Track and ensure customer inquiries and issues are resolved in a timely manner by SVCE staff or partner organizations.

Minimum Qualifications

Experience/Education
Any combination of education and experience that would provide the knowledge and abilities listed. This is typically satisfied by possession of a Bachelor’s or Master’s Degree in public administration, business administration, or a related field and four (4) years of experience in customer service, energy industry operations and account management.

Knowledge of:
• Electric utility rules, tariffs, bill design and terminology
• Microsoft Office Suite including Excel, Word, PowerPoint and Adobe Acrobat
• Principles of account services, customer service, and program management

Ability to:
• Take responsibility and work independently, as well as coordinate team efforts
• Perform rate analysis with multiple rate classes, tiers, and billing components
• Convey complex information in a simple and understandable manner
• Manage multiple priorities, meet deadlines, and quickly adapt to changing priorities in a fast paced dynamic environment
• Achieve goals and provide accurate, timely, and meaningful progress updates
• Work well under pressure
• Be thorough and detail-oriented
• Demonstrate patience, tact, and courtesy
• Identify and solve problems effectively and expeditiously
• Establish and maintain effective working relationships with persons encountered during the performance of duties
• Direct, supervise and coordinate the work of assigned staff
• Communicate effectively verbally, in writing, and through presentations
• Exercise sound judgment, creative problem solving, effective dispute resolution, and commercial awareness
• Provide excellent customer service and communicate clearly and effectively with customers
• Understand, anticipate, and appreciate customer needs and concerns

Working Conditions
The physical demands described here are representative of those required for the position. Position requires sitting, walking, standing, bending, and twisting in the performance of daily activities. The position requires hand manipulation and repetitive hand movement and fine coordination in using a computer keyboard. The position
requires near and far vision in reading reports and use of a computer. Acute hearing is required in supporting meetings and providing phone and in-person customer service. The position occasionally requires lifting and/or moving objects up to 20 pounds. SVCE will make reasonable accommodation of the known physical or mental limitations of a qualified applicant with a disability upon request.

**Licenses/Certificates:**
Possession and continued maintenance of a valid class C California driver’s license or the ability to provide alternate transportation as approved by the CEO and a safe driving record.
Summary
Account Representative I/II team members work under general supervision from the Account Services Manager and have responsibility for a wide range of customer service and community development matters. Responsibilities include responses to customer inquiries, billing analysis, and providing presentations to business and community groups. Account Representative I is the typical entry level classification while Account Representative II is distinguished by greater responsibility and independence and may supervise or lead other team members.

Job Description
The Account Representative I/II works directly with residential and/or business customers via email and telephone, and through in-person meetings and interactions. They are expected to be experts in SVCE programs and to provide customers or other staff with technical explanations of SVCE programs and billing mechanisms. To be effective, the Account Representative will also need to develop familiarity with PG&E programs and billing mechanisms, and be able to analyze and explain usage and billing data for customers and other staff.

The Account Representative will also assist with outreach and community events within the SVCE service territory, to both educate and build relationships with various groups. Account Representatives may be assigned with tasks related to the maintenance and implementation of various SVCE customer programs.

The Account Representative II position is differentiated from the Account Representative I position based upon greater responsibilities such as handling more complex accounts, and the position may include supervision, as well as related experience.

Supervisory Responsibilities
The Account Representative II position may require supervisory and/or team leader responsibilities.

Essential Duties and Responsibilities
- Effectively explain the SVCE program to customers and respond to questions clearly and adequately.
- Explain utility bill details and charges and communicate billing information to customers.
- Perform rate and cost comparisons for customers.
- Provide support for escalated interactions from SVCE call center representatives.
- Manage incoming customer inquiries with professionalism and tact.
- Attend, present, and network at community meetings and events as SVCE spokesperson.
- Ensure correspondence with customers is clear, consistent and timely.
- Interface and maintain relationships with key accounts.
- Utilize CRM (customer relationship management) tools to track customer interactions.
- Manage portfolio of customers and programs as assigned.

Minimum Qualifications

Experience/Education
Education and experience equivalent to:
Account Representative I

A Bachelor’s degree in accounting, communications, marketing or a related field and a minimum of two (2) years of experience managing key accounts with a utility or energy service provider. A Master’s degree is desirable. Bilingual proficiency in Spanish and English is strongly preferred.

Account Representative II

A Bachelor’s degree in accounting, communications, marketing or a related field and a minimum of four (4) years of experience managing key accounts with a utility or energy service provider. A Master’s degree is desirable. Bilingual proficiency in Spanish and English is strongly preferred.

Knowledge of:

- Utility billing structures, bill presentment, and program operations.
- Community Choice Aggregation (CCA) programs and the services SVCE offers.
- The interaction between CCAs and investor-owned utilities.
- Diverse communities and customer types in the SVCE service area.
- Microsoft Excel, including some familiarity with functions and advanced features.
- Microsoft Office Suite, including Power Point and Word.
- Principles of account management, marketing and salesmanship.
- CRM platforms.
- Appropriate telephone and e-mail etiquette.
- Principles and practices of employee supervision (for Account Representative II)

Ability to:

- Take responsibility and work independently, as well as coordinate or participate in team efforts.
- Perform rate comparisons and bill calculations with multiple rate classes, tiers and billing components.
- Establish and maintain effective working relationships with supervisors, co-workers, customers, local community groups and organizations and SVCE Board members.
- Exercise sound judgment in applying appropriate policies and procedures.
- Demonstrate creative problem solving and commercial awareness.
- Communicate effectively both verbally (by phone and in-person) and in written form.
- Manage projects and time efficiently.
- Represent SVCE with confidence and enthusiasm.
- Be self-motivated with a strong drive to resolve issues quickly and effectively.
- Manage multiple priorities and quickly adapt to changing priorities in a fast paced, dynamic environment.
- Work accurately and swiftly under pressure.
- Demonstrate patience, tact and courtesy.

Willingness to

- Work occasional overtime or on weekends and evenings

Working Conditions

The physical demands described here are representative of those required for the position. Position requires sitting, walking, standing, bending, and twisting in the performance of daily activities. The position requires hand manipulation and repetitive hand movement and fine coordination in using a computer keyboard. The position requires near and far vision in reading reports and use of a computer. Acute hearing is required in supporting
meetings and providing phone and in-person customer service. The position occasionally requires lifting and/or moving objects up to 20 pounds. SVCE will make reasonable accommodation of the known physical or mental limitations of a qualified applicant with a disability upon request.

**Licenses/Certificates:**
Possession and continued maintenance of a valid class C California driver’s license or the ability to provide alternate transportation as approved by the CEO and a safe driving record.
Summary
The Community Outreach Specialist works under direction of the Director of Marketing & Public Affairs or Community Outreach Manager and has a wide range of responsibilities for advancing Silicon Valley Clean Energy's programs and conducting strategic community outreach and advocacy for the Public Affairs department.

Job Description
The Community Outreach Specialist works independently and in teams to interface with a wide range of community, stakeholder, and customer groups, conducting strategic outreach and community organizing efforts to advance SVCE programs and goals. The Community Outreach Specialist is responsible for cultivating and developing relationships with key stakeholder groups, and for communicating SVCE’s central messages consistently to target audiences via professional networking, printed literature, web-based material, electronic correspondence, public presentations, and verbal interactions. The incumbent also participates in community events, conducts outreach local government representatives, and responds to inquiries from potential customers via email, telephone, and in-person dialogue.

Essential Duties and Responsibilities (Illustrative Only)
- Plan, organize and implement community outreach efforts to enhance marketing of SVCE services to the general public, customers, and public agencies.
- Initiate and develop collaborative relationships with community members, local business owners, municipal staff, public officials, and other key stakeholders.
- Cultivate partnerships and mobilize public support to expand public awareness of and increase enrollments in SVCE programs including 100% renewable energy option(s) via public events, social media, press coverage, e-mailing, customer visits, and cold calling.
- Emphasize product and service features and benefits, quote costs, and discuss customer terms.
- Deliver presentations to various community groups and local representatives.
- Participate in public events to distribute information about SVCE and interact with members of the public.
- Act as a liaison to local groups, civic institutions, and community-based organizations.

Supervisory Responsibilities
Supervisory responsibilities are not required for this position.

Minimum Qualifications

Experience/Education
Education and experience equivalent to a Bachelor’s degree in communications, public administration, environmental planning or a related field and two (2) years of experience in community outreach, or equivalent experience. Experience working in a public utility and/or a Community Choice Aggregate program is desirable.

Knowledge of:
- SVCE electric service options and customer programs
- The mission and goals of SVCE
- Environmental policy, public administration, and energy regulation
• Microsoft Office Suite including Excel, Word, PowerPoint and Adobe Acrobat
• Diverse communities and cultures

**Ability to:**
• Take responsibility and work independently, as well as participate in team efforts.
• Utilize strong interpersonal and phone etiquette skills, verbal communications, grammatical and professional business skill sets to promote and explain SVCE programs
• Establish and maintain effective working relationships with persons encountered in the performance of duties
• Enhance own development by taking responsibility for staying informed and up to date with industry knowledge
• Exercise sound judgment in applying appropriate policies and procedures.
• Demonstrate creative problem solving and commercial awareness.
• Communicate effectively both verbally (by phone and in-person) and in written form.
• Manage projects and time efficiently.
• Effectively track customer interactions using customer relations management or similar system
• Represent SVCE and promote its services with confidence and enthusiasm
• Coordinate work with community groups
• Manage multiple priorities and quickly adapt to changing priorities in a fast paced, dynamic environment
• Develop or contribute to high-quality writing, research and communication work products.
• Work accurately and swiftly under pressure
• Demonstrate patience, tact, courtesy, and flexibility
• Read, write and speak Spanish is desirable

**Willingness to**
• Work occasional overtime or on weekends and evenings

**Working Conditions**
The physical demands described here are representative of those required for the position. Position requires sitting, walking, standing, bending, and twisting in the performance of daily activities. The position requires hand manipulation and repetitive hand movement and fine coordination in using a computer keyboard. The position requires near and far vision in reading reports and use of a computer. Acute hearing is required in supporting meetings and providing phone and in-person customer service. The position occasionally requires lifting and/or moving objects up to 20 pounds. SVCE will make reasonable accommodation of the known physical or mental limitations of a qualified application with a disability upon request.

**Licenses/Certificates:**
Possession and continued maintenance of a valid class C California driver's license or the ability to provide alternate transportation as approved by the CEO and a safe driving record.
SVCE Summary of Benefit Package

Health Insurance
- Employer provides Health Care plan 105 which provides employees with up to $1000/month to reimburse them for payments they make towards the purchase of medical, dental and vision insurance coverage.
- The employee must provide proof of health coverage within 30 days of starting date.

Retirement
- Employee will participate in the social security program. Employer to pay 50% of the cost of employee participation
- Employer to provide 10% of wages to 401A plan.
- Employee can voluntarily contribute up to the IRS limits to 457B plan.
- Employer will pay for 50% of Medicare program cost

Payroll Taxes
Employer covers Workman Compensation, State Unemployment Insurance, State Disability Insurance including paid family leave.

Leave
Employee is granted 200 hours per calendar year of paid leave for vacation, sick, personal and bereavement. The balance of employee leave hours cannot exceed 400 hours at any given time.

Holiday
Employee is granted 64 hours of holiday leave on federal holidays. In addition, employee is granted the day following Thanksgiving and Christmas Eve as holiday days.

California State Program for Pregnancy/Maternity/Paternity
Maternity/paternity available to eligible employees during qualified period; pregnancy disability leave pays up to 60% of employee weekly wages for up to 4 months (88 days) and paid family leave for mothers and fathers to bond with a new child up to 55% of employee’s wage for up to 6 weeks (30 days).

Jury and Military Leave
Both paid and unpaid.

Long-term Disability Insurance
LTD provided at 60% of salary subject to term of LTD insurance carrier and cap based on salary.
Term Life Insurance
Guaranteed $200,000 life and AD&D coverage.

Flexible Spending Account
Pre-tax deductions for health spending and dependent care.