

Job Title: Senior Rate Analyst**Location:** Main Office**Department:** Finance**Job Status:** Full-Time**Reports To:** Finance and Risk Supervisor**Job Grade:** 604**Pay Status:** Exempt**Date Created/Updated:** 7/18/2023

Position Summary

The Senior Rate Analyst will support the NBU finance and risk operations, specifically in the area of rates and fees. This position will primarily be responsible for maintaining, reviewing and analyzing NBU's service rates and fees. Essential functions will include but not be limited to maintaining rate models, conducting cost of service studies, developing presentations, coordinating with other departments or utilities, and researching and analyzing complex data.

Essential Duties & Responsibilities**UTILITY RATE MANAGEMENT**

- Review and calculate the rates and fees of the utility.
- Conduct cost of service studies for electric, water and wastewater and evaluate adequate cost recovery and revenue sufficiency.
- Maintain rate models in real-time.
- Maintain rate/bill comparisons for electric, water and wastewater rates to benchmark against surrounding utilities.
- Become knowledgeable about NBU's rate ordinances and update them when necessary.
- Study areas in rates and fees where issues may arise, and formulate a plan that can help resolve these issues.
- Coordinate with Marketing and Communication Department to ensure that all external rate information is updated correctly before being released to the public.
- Review and assist in the ratemaking budget process to ensure that proposed rate adjustments help the utility meet its revenue requirements in the financial operating plan.

ENTERPRISE FEES

- Conduct utility fee studies and subsequent analyses as needed to calculate and benchmark applicable fees across the utility.

INTERNAL AND EXTERNAL EDUCATION AND COMMUNICATIONS

- Develop models to assist the Customer Service Department in conveying any rate and/or fee changes to customers.
- Develop and present training on new rates and/or fees to relevant departments.
- Prepare presentations as needed to articulate rates and fees included in the rate plan.

IMPACT FEES

- Coordinate with the Water Engineering Department to conduct impact fee studies for water and wastewater and evaluate adequate cost recovery and revenue sufficiency.

DATA ANALYSIS

- Model scenarios to project the impact of critical business decisions.
- Research and analyze complex customer data to identify trends and create recommendations to assist management team in decision making.
- Review and approve monthly stats and unbundled reports to ensure rate accuracy; notify Accounting/Billing

departments of any discrepancies; ensure that the rates NBU charges conform to the rates established in ordinance and provide appropriate rate recovery; and bring to the attention of Management any rate setting anomalies.

- Coordinate with Data Strategy Department periodically to identify data needs.

WHOLESALE CONTRACT MANAGEMENT

- Update wholesale rates annually or as needed.
- Assist in wholesale contract negotiations and contract administration for special projects, including re-use water, etc.
- Coordinate with wholesale customer advisory groups regarding financial, budgetary, and contractual matters.

SPECIAL PROJECT TEAMS

- Participate in any internal project teams whose work may effectuate impacts to rates/fees.

OTHER MISCELLANEOUS DUTIES

- Participate in the annual financial audit, providing any data that may be needed to the Accounting department.
- Recommend and implement process improvements.
- Perform other related duties as necessary, including training new team members and/or back-ups.

GENERAL RESPONSIBILITIES

- Maintain regular attendance; leave schedule should be managed so as to not interfere with ability to accomplish tasks, including special projects and assignments with deadlines.
- Maintain strict confidentiality of company, employee and customer information in written and oral communications and safeguard sensitive documents.
- Adhere to NBU policies and procedures, as well as safety guidelines and practices, at all times.
- Exemplify NBU Core Values of Safety, Team, Integrity, Culture, and Stewardship.
- Maintain a clean and safe work area, office, field site and vehicle as applicable.
- Participate in and support initiatives to reach annual NBU Strategic Goals.

Formal Education and Work Experience Requirements

Degree/Diploma Obtained: Bachelors

Field of Study: Business

Work Experience Time Frame: Three Years or More

Other: Data Analytics, Statistics, Math, Finance

Certification and Licensures Requirements

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Other Minimum Qualifications

- Ability to prioritize tasks and respond positively and effectively to changes in priorities.
- Demonstrated ability to work with a strong sense of urgency and meet deadlines without close supervision.
- Ability to organize and evaluate complex amounts of information and documentation.
- Strong analytical and problem-solving abilities and attention to detail.
- Relevant experience with MS Office Suite, specifically Microsoft Excel, in order to produce reports, spreadsheets and presentations that are accurate, concise and navigable.
- Minimum of 5 years of direct experience can be substituted for the degree requirement.

Knowledge of Computer Software

	No Knowledge	Beginner	Intermediate	Expert
Arc GIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AutoCAD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Crystal Reports	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Microsoft Access	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Microsoft Excel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Microsoft Word	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Microsoft Publisher	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Microsoft PowerPoint	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other Software Knowledge

Click or tap here to enter text.

Experience with Machines, Tools, Equipment and Other Work Aids

Telephone, Fax Machine, Calculator, Copier, Shredder, Computer, Scanner, Printer

Physical Demands

Standing: Occasionally

- ☒ Making Presentations
- ☐ Observing Work Sites
- ☐ Observing Work Duties
- ☒ Communication with Co-Workers

Fine Dexterity: Constantly

- ☒ Computer Keyboard
- ☐ Telephone Keypad
- ☒ Calculator
- ☐ Calibrating Equipment

Walking: Occasionally

- ☒ To Other Departments/Office/Office Equipment
- ☐ Around Worksite

Carrying: Occasionally

- ☐ Supplies
- ☐ Equipment
- ☒ Files

Sitting: Constantly

- ☒ Desk Work
- ☒ Meetings
- ☐ Driving

Reaching: Frequently

- ☐ For Supplies
- ☒ For Files

Handling: Constantly

- ☒ Paperwork
- ☐ Monies

Kneeling: Occasionally

- ☒ Filing in Lower Drawers
- ☐ Retrieving Items from Lower Shelves/Ground

Pushing/Pulling: Occasionally

- ☒ File Drawers
- ☐ Equipment
- ☒ Table and Chairs
- ☐ Hose

Climbing: Rarely

- ☒ Stairs
- ☐ Ladder
- ☐ Step Stool
- ☐ Onto Equipment

Vision: Constantly

- ☒ Reading
- ☒ Computer Screen
- ☐ Driving
- ☐ Observing Worksite

Foot Controls: Never

- ☐ Driving

- ☐ Operating Heavy Equipment
- ☐ Dictaphone

Balancing: Occasionally

- ☐ On Ladder
- ☐ On Equipment
- ☐ On Step Stool

Bending: Occasionally

- ☒ Filing in Lower Drawers
- ☐ Retrieving Items from Lower Shelves/Ground
- ☐ Making Repairs

Crouching: Occasionally

- ☒ Filing in Lower Drawers
- ☐ Retrieving Items from Lower Shelves/Ground

Crawling: Rarely

- ☐ Under Equipment
- ☐ Inside Attics/Pipes/Ditches

Hearing: Constantly

- ☒ Communication Via Telephone/Radio/To Co-Workers/Public
- ☐ Listening to Equipment

Twisting: Constantly

- ☒ From Computer to Telephone
- ☐ Getting Inside Vehicle

Talking: Constantly

- ☒ Communication Via Telephone/Radio/To-Co-Workers/Public

Other: Click or tap here to enter text.

Environmental Factors

	Never	Seasonally	Several Times Per Year	Several Times Per Month	Several Times Per Week	Daily
Extreme Temperature (Heat, cold, extreme temp. change)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wetness and/or humidity (bodily discomfort from moisture)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Respiratory Hazards (Fumes, gases, chemicals, dust, and dirt)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Noise and Vibration (sufficient to cause hearing loss)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Hazards (High voltage, dangerous machinery, aggressive Customers)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Health and Safety Conditions

	Never (Never Occurs)	Rarely (Less than 1 hour per week)	Occasionally (1/3 or more of the time)	Frequently (From 1/3 to 2/3 of the time)	Constantly (2/3 or more of the time)
Mechanical Hazards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Chemical Hazards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Electrical Hazards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fire Hazards	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explosives	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicable Diseases	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Physical Danger or Abuse	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other: Click or tap here to enter text.

Primary Work Environment: Office Environment

Other: Click or tap here to enter text.

Overall Strength Demands

- ☒ Sedentary - Exerting up to 10 pounds occasionally or negligible weight frequently, mostly sitting
- ☐ Light - Exerting up to 20 pounds occasionally, 10 pounds frequently, walking or standing often
- ☐ Medium - Exerting 20 - 50 pounds occasionally, 10 - 25 pounds frequently, or 10 pounds constantly
- ☐ Heavy - Exerting 50 - 100 pounds occasionally, 25 - 50 pounds frequently, or 10 - 20 pounds constantly
- ☐ Very Heavy - Exerting 50 pounds constantly

Non-Physical Demands

	Never	Rarely	Occasionally	Frequently	Constantly
Time Pressure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Emergency Situations	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Frequent Change of Task	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Irregular Schedule/Overtime	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Performing Multiple Tasks Simultaneously	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Working Closely with Others as Part of a Team	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tedious or Exacting Work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Noisy/Distracting Environment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Other: Click or tap here to enter text.

Employee Statement of Understanding

THIS JOB DESCRIPTION DOES NOT CONSTITUTE AN EMPLOYEE AGREEMENT BETWEEN NEW BRAUNFELS

UTILITIES (NBU) AND THE EMPLOYEE. Nothing in this position description restricts NBU's ability to assign, reassign or eliminate duties and responsibilities of this job at any time.

I HAVE READ AND RECEIVED A COPY OF THIS JOB DESCRIPTION.

Employee's Signature

Employee's Printed Name

Date