



## **Rates and Revenue Manager**

Orange County Power Authority seeks a collaborative and analytically driven professional to lead and support the development and implementation of OCPA's electricity rates, tariffs, and financial/revenue modeling initiatives. This role is responsible for managing revenue and expense modeling work related to retail rate design, cost-of-service analysis, revenue forecasting, and utility tariff monitoring to ensure OCPA's rates remain competitive, financially sustainable, and aligned with regulatory requirements. Working closely with internal teams and external partners, the Rates and Revenue Manager will translate complex data into actionable insights that support strategic decision-making, financial planning, and revenue forecasting.

### **About OCPA:**

**OCPA is a dynamic public agency serving customers with renewable energy options at competitive rates.** A Community Choice Aggregator (CCA) alongside 24 others across the state of California, OCPA launched service in 2022 and currently serves over 177,000 customer accounts in Southern California Edison territory. Member cities include Buena Park, Fullerton, Irvine, and Fountain Valley with plans to continue expanding the service territory. For more information, please visit our website at [www.ocpower.org](http://www.ocpower.org).

**Submissions Process:** Candidates should send a cover letter and resume with a minimum of three professional references to [recruitment@ocpower.org](mailto:recruitment@ocpower.org). Submissions will be accepted and reviewed on a continuous basis, with selections for interviews being made when a sufficient number of qualified submissions have been received.

### **About the Position**

The Rates and Revenue Manager will manage and support the development, analysis, and implementation of OCPA's electricity rate structures, tariffs, and related analytical models. This position plays a key role in supporting annual rate-setting processes, evaluating investor-owned utility tariffs, forecasting customer and revenue impacts, and maintaining analytical tools used to inform rate strategy and financial planning.

The position will work closely with internal teams, consultants, and external service providers to ensure accurate implementation of rate changes and maintain analytical tools that evaluate rate competitiveness and customer impacts. This role also supports strategic planning, policy analysis, and Board reporting related to electricity rates and financial planning/revenue forecasting.

The ideal candidate will bring strong analytical capabilities, knowledge of utility rate design and energy markets, and the ability to translate complex data into clear insights that support executive decision-making.

This position follows a hybrid work schedule.

## **SUMMARY**

The Rates and Revenue Manager, reporting to the Director of Finance and Data Analytics, is responsible for managing and supporting the development, analysis, implementation, and ongoing management of OCPA's electricity rate design, tariffs, cost-of-service modeling, revenue requirement analysis, and financial scenario modeling. This position oversees complex analytical work related to retail rate development, rate competitiveness, revenue forecasting, customer data analysis, utility tariff monitoring, and financial modeling.

The Rates and Revenue Manager collaborates closely with Power Services, Regulatory and Legislative Affairs, Communications and External Affairs, and external partners supporting rate strategy and data management to ensure that OCPA's rates and related data-driven strategies remain financially sustainable, operationally implementable, and aligned with regulatory requirements and organizational goals. This position is also responsible for coordinating the internal and external information necessary to support the development and implementation of rates and tariffs.

The position plays a key role in supporting strategic decision-making by translating large and complex revenue and expense related dataset into actionable insights, supporting rate implementation efforts, evaluating the impact of utility and regulatory changes, and preparing clear recommendations for senior management.

#### **EXAMPLES OF DUTIES / FUNCTIONS**

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job. Duties and responsibilities include, but are not limited to:

- Support the development, evaluation, and recommendation of retail electricity rate structures, tariffs, and pricing options for residential, commercial, industrial, net energy metering (NEM), and municipal customer classes.
- Support and administer annual and ad hoc rate-setting efforts, including cost-of-service analysis, revenue requirement modeling, bill determinant analysis, and scenario modeling to support financially sound rate recommendations.
- Maintain analytical models for budgets, forecasting, rate design, customer bill impacts, revenue forecasting, and fiscal impact analysis.
- Support the implementation of approved rate changes by coordinating with internal data staff, external data management partners, and communications staff to ensure timely and accurate execution.
- Analyze investor-owned utility (IOU) tariffs, including Southern California Edison (SCE) and San Diego Gas & Electric (SDG&E), rate components, and ratemaking developments, including Power Charge Indifference Adjustment (PCIA) and other charges, to evaluate OCPA's competitive position and customer bill impacts.
- Develop and maintain rate comparison tools, joint-rate comparison materials, bill impact calculators, and other customer-facing or internal analytical tools used to evaluate OCPA program offerings relative to utility rates.
- Integrate load forecasting, demand analysis, and sensitivity analysis to support rate development, budgeting, and revenue forecasting and planning.
- Work closely with analytics team for overall revenue performance.
- Design, maintain, and improve dashboards and reporting tools that track key performance indicators related to rate competitiveness, customer behavior, operational performance, and financial outcomes.
- Coordinate with necessary parties to maintain and update budget/financial forecast scenarios.
- Support the development of innovative customer programs, products, incentives, and tariffs by analyzing rate design options, customer impacts, and financial feasibility.
- Provide technical and analytical support for Board reports, presentations, policy initiatives, strategic

planning, budgeting, and special projects with financial or customer rate impacts.

- Evaluate pending utility, regulatory, and legislative actions and assess their implications for OCPA rates, customer programs, billing operations, and financial planning.
- Support regulatory filings, comment letters, testimony development, and other regulatory or legislative analyses related to rates, tariffs, and customer impacts, as assigned.
- Collaborate with external consultants, data management service providers, billing administrators, and technology vendors supporting billing, rate implementation, and data analytics platforms.
- Benchmark OCPA's rates, products, and performance metrics against utilities, peer CCAs, and market trends to identify opportunities for improvement and strategic positioning.
- Working closely with FinTech staff with necessary insights and knowledge for streamlining the current process.
- Perform other duties as assigned.

## **QUALIFICATIONS**

### **Minimum Qualifications**

Education and Experience: A Bachelor's degree from an accredited college or university in Finance, Accounting, Economics, Data Science, Statistics, Computer Science, Applied Mathematics, Engineering, or other quantitative discipline, and a minimum of seven (7) years of progressively responsible experience in utility rate design, cost-of-service analysis, revenue forecasting, financial analysis, energy analytics, utility billing operations, or a related field is required. Experience working within a Community Choice Aggregator (CCA), investor-owned utility (IOU), public utility, energy consulting firm, or regulatory agency is highly desirable. Experience working with utility tariffs, billing systems, customer usage data, and third-party billing or data management providers is strongly preferred. Possession of a valid State of California driver's license is preferred.

### **Other Qualifications**

Job Expertise: Demonstrates knowledge of and experience with applicable professional and technical principles and practices, and federal and state rules and regulations, including but not limited to:

- Electric utility rate design, tariff development, rate implementation, cost-of-service analysis, and revenue requirement modeling.
- Retail electricity rate structures; customer class design, bill determinant analysis, and customer bill impact evaluation.
- Load forecasting, demand analysis, revenue forecasting, and fiscal impact modeling.
- Utility billing systems, billing operations, and implementation constraints associated with rate changes.
- IOU tariffs, transmission and distribution charges, PCIA, and related ratemaking concepts affecting CCA competitiveness.
- Community Choice Aggregators (CCAs), electric utilities, energy service providers, and California's electric utility regulatory framework.
- California Independent System Operator (CAISO), California Public Utilities Commission (CPUC), and California Energy Commission (CEC), and other regulatory bodies impacting rates and data reporting.
- Customer usage, billing, enrollment, and revenue data, including experience working with third-party data management or billing service providers.
- Financial modeling, spreadsheet analysis, and dashboard or data visualization tools.
- Energy markets, procurement cost drivers, and regulatory and policy developments affecting CCA operations.

- Preparation of technical analyses, staff reports, and presentation materials for senior management and governing boards.

Analytical Thinking: Approaches a problem or situation by using a logical, systematic, sequential approach.

Collaboration: Develops networks and builds alliances; engages in cross-functional activities, and clearly communicates complex analytical findings.

Communication Skills: Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills and displays openness to other people's ideas and thoughts.

Fiscal Management: Demonstrates strong financial acumen and supports responsible management of rate revenue and energy procurement costs. Complies with applicable laws and policies.

Leadership: Leads by example; demonstrates high ethical standards; remains visible and approachable and interacts with others on a regular basis; promotes a cooperative work environment, allowing others to learn from mistakes; provides motivational support and direction.

Vision/Strategic Thinking: Supports, promotes, and ensures alignment with the organization's vision and values; understands how an organization must change in light of internal and external trends and influences; builds a shared vision with others and influences others to translate vision to action.

Supervision: Sets effective long and short-term goals based on a good understanding of management practices; establishes realistic priorities within available resources; provides motivational support; empowers others; assigns decision-making and work functions to others in an appropriate manner to maximize organizational and individual effectiveness.

### **PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer/laptop; to operate a motor vehicle, and to visit various meeting sites in Orange County for the conduct of the Authority's business. This is primarily a sedentary office classification, although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve information using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

### **ENVIRONMENTAL ELEMENTS**

This is primarily a sedentary classification, and the employee works in an office environment with moderate noise levels, controlled temperature conditions, and no known direct exposure to hazardous physical substances. The employee interfaces with staff, management, other Authority's representatives, and government officials, business representatives, and the general public in explaining the Authority's programs and requesting and providing information.

### **COMPENSATION AND BENEFITS**

Salary is commensurate with experience. The salary range for this position is \$154,800 to \$222,900 per year. OCPA offers a generous benefits package that includes:

- Individual, family, and domestic partner health insurance (medical, dental, vision)
- Life, short-term disability, and long-term disability insurance coverages

- Retirement with employer matching
- Paid-time-off (PTO) and holidays
- Health and wellness reimbursement benefit
- Technology stipend
- Flexible spending accounts (FSA) – health and dependent care

This is an exempt position. This is not a civil service position; however, some OCPA employees may be required to submit a Statement of Economic Interests form, also known as the Form 700.

Orange County Power Authority is an equal opportunity employer to all, regardless of age, ancestry, color, disability (mental and physical), exercising the right to family care and medical leave, gender, gender expression, gender identity, genetic information, marital status, medical condition, military or veteran status, national origin, political affiliation, race, religious creed, sex (includes pregnancy, childbirth, breastfeeding and related medical conditions), and sexual orientation.