

EXECUTIVE DIRECTOR OF PLANNING SERVICES

OVERALL JOB PURPOSE STATEMENT

Under the direction of the Associate Superintendent/Business Services, and in close coordination with the Chief Facilities Officer, the job of "Executive Director of Planning Services" is managing the District's facility planning program, managing and directing activities to identify, secure, and account for the financing and expenditures necessary to ensure schools and support facilities are constructed, renovated, and available in a timely manner, including fiscal management for implementation of the facilities and technology master plans.

DISTINGUISHING CHARACTERISTICS

The Executive Director of Planning Services is a single-position management class responsible for coordinating development of the District's facilities master plans, integrating technology needs into the District's facilities master plan, planning for the most cost-effective debt issuance within project time lines, and carrying out the day-to-day activities of the District's facility master plan including developing funding options, coordinating with other governmental agencies, monitoring the activities of consultants, developing program account budgets, and ensuring compliance with continuing financial disclosure obligations of bond underwriters, credit rating bureaus, or regulatory agencies. To accomplish program objectives, this class identifies and develops data sources for projecting future trends, designs, implements and monitors data collection systems and activities, and develops and prepares reports and recommendations for District action.

ESSENTIAL FUNCTIONS

- Assists district administration for the purpose of formalizing long-range facilities and technology plans, evaluating available resources and funding mechanisms and projecting enrollment trends.
- Analyzes the impact of new development on the District for the purposes of projecting future facilities and technology needs and updating the District's facilities and financing master plan.
- Administers various capital facility funds and community facility districts (CFD) for the purpose of ensuring their accuracy, integrity, availability for authorized use and conformance to applicable statutes.
- Supervises the issuance of construction bonds, collection of developer fees and Mello-Roos taxes for the purpose of ensuring accurate and timely receipt, release, and recording of funds.
- Coordinates with financial advisers, underwriters and legal counsel in issuance of capital debt to ensure the most cost-effective financial instruments are used that will support the timely implementation of the facilities master plan.
- Manages financial regulatory compliance efforts on behalf of the District, the San Dieguito Public Facilities Authority, North City West JPA or other affiliated public agencies which may be required by law or municipal securities official statements.
- Researches/analyzes laws, regulations, legislation and policies for the purpose of preparing and submitting financial information to comply with continuing disclosure requirements of bond underwriters, credit rating bureaus and regulatory agencies pertaining to municipal securities issuers.
- Represents the District to the Office of Public School Construction, the State Department of Education, the Division of the State Architect, the Coastal Commission, the Department of Toxic Substances Control, the County Office of Education, local planning boards and departments, and with other agencies for the purpose of presenting, garnering support for and gaining funding and

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approval, and tracking applications for documentation necessary to obtain State approval and funding.

- Coordinate information sharing and decision-making processes with elementary districts for the purpose of resolving issues of the impact of new projects and proposed developments and for developing a coordinated response on planning issues affecting all districts.
- Coordinates the analysis of sites, the acquisition of property and the development of designs and plans for the purpose of carrying out the District's facilities master plan.
- Prepares and executes applications to State and other funding agencies for the purpose of initiating facility construction, upgrade and repair projects.
- Communicates/coordinates activities and projects with the staffs of the County, cities, developers and architects to determine the impact of development on the District and planning for school facilities gaining the necessary financial agreements from developers and government agencies.
- Contacts/coordinates with property owners, developers and other members of the public to obtain and provide information on the impact of proposed developments and to the potential impact of these developments on the District.
- Reviews mitigation and developer agreements for the purpose of determining appropriate rate, method and amounts of special taxes and fees.
- Attends meetings for the purpose of conveying the District's position on land use matters, joint use agreements and construction and improvement of sites.
- Prepares financial projections for the purpose of determining the amount of revenue available to carry out the facility and technology master plans.
- Researches/analyzes laws, regulations, legislation and policies for the purpose of assessing their potential impact on the facility master plan, for recommending appropriate revisions to District policies and procedures and for assisting other staff in coordinating the updating and maintenance of appropriate Board policies and regulations.
- Plans/establishes manual and automated systems for the purpose of maintaining complex, technical and financial records and accounts and for reporting information on activities and costs associated with financing of the facility and technology master plans.
- Performs facility space and size planning in consultation with affected managers, staff, architects and other consultants for the purpose of identifying and incorporating all relevant issues into the development and implementation of plans for facility use.
- Conducts performance review of assigned staff for the purpose of ensuring conformance of work activities to program goals and objectives, developing capabilities of staff, and maintaining District standards, policies, and procedures.

OTHER FUNCTIONS

- Assists the Associate Superintendent of Business as assigned for the purpose of selecting and training replacement staff to support assigned programs and for researching alternatives for organizing and designing the delivery of facility projects.
- Performs other related duties as assigned to ensure the efficiency and effectiveness of the work unit.

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JOB REQUIREMENTS: MINIMUM QUALIFICATIONS

KNOWLEDGE, SKILLS AND ABILITIES

KNOWLEDGE is required to perform higher levels of math such as advanced algebra, calculus, statistics, financial modeling; to read scientific and/or technical journals, write manuals, speak persuasively in relation to concepts and theories; to analyze situations to define issues and draw conclusions. Job specific knowledge is required in the following areas: school facility planning and demographic analysis techniques; applicable requirements for establishing, maintaining and accounting for community facility districts; financial instruments and issuance of capital debt to accomplish school facility construction and renovations; continuing disclosure obligations contained in municipal security official statements; State codes and regulations and District policies related to school construction contracting, real estate transaction, insurance, contracting with independent consultants; uniform building codes; interpretation of working drawings; methods and terminology used in contracting, real estate transactions, insurance and accounting and reporting on facility and technology financing; budgeting and financial reporting; establishing procedures and guidelines for gathering data to complete complex reports; office organization systems; District organization, operations, policies and objectives; interpersonal skills using tact, patience and courtesy; correct English usage, grammar, spelling, punctuation and vocabulary; oral and written communication skills; modern office practices, procedures and equipment; operation of computer terminal.

SKILLS are required to perform multiple, highly complex, technical tasks with a potential need to upgrade skills in order to meet changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: preparing and maintaining accurate records; operating standard office equipment; and using pertinent software applications; negotiating with financing entities to ensure the most cost-effective financial instruments are used that will support the timely implementation of the facilities master plan.

ABILITY is required to schedule a number of activities, meetings, and/or events; routinely gather, collate and/or classify data; and use job-related equipment; to work with a significant diversity of individuals and/or groups; work with data or widely varied types and/or purposes. In working with others, independent problem solving is required to analyze issues and create action plans. Problem solving with data frequently requires independent interpretation of guidelines and development of new guidelines. Specific abilities required to satisfactorily perform the functions of the job include: plan debt issuance activities and create funding streams to sustain ongoing, simultaneous, complex facility construction and renovation projects in the master plan; administer capital facility funds and work closely with Business Services staff on budgeting and accounting of facility funds; prepare and submit financial documentation necessary to comply with continuing disclosure requirements; represent the District at the State and local level with officials and with the community; present complex information to an audience; analyze and solve problems relating to facility financing and construction; monitor construction contracts and agreements; prepare specifications, procedures manuals, schedules, correspondence and other written material; schedule construction activities; confer with architect(s), engineers, planners, school and district administrators, contractors, government agencies and others; monitor the work of consultants and professional experts; conduct analytical studies; plan, organize and maintain complex technical record keeping, accounting and reporting for various district facility financing sources; prepare, organize

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and conduct research and compile data to complete complex reports; analyze pending legislation, laws and regulations to determine impact on the District and to recommend revisions in policies; understand and use complex software programs; read, interpret, apply and explain rules, regulations, policies, procedures, agreements and contracts; analyze situations accurately and adopt an effective course of action; read, understand and interpret agreements, contracts and construction bids; plan, initiate and complete assignments independently with minimum direction; collaborate planning activities with Business Services staff, site staff and others; coordinate the development and recommendation of a large range facility and financing master plan for District consideration; represent the District with state and local officials and the community regarding complex and controversial facility issues; communicate/coordinate activities and projects with other agencies and District staff; negotiate with developers and property owners and other public agency representatives regarding District facilities and financing needs; research and implement systems to track housing units, facility funds and District projects; work with District staff, architects and others on implementing a facility master plan; plan and organize work, and assign, supervise and evaluate the work of subordinates; meet schedules and time lines; establish and maintain cooperative and effecting working relationships with a wide variety of staff, consultants, contractors and vendors.

RESPONSIBILITY

Responsibilities include: working independently under broad organizational guidelines to achieve unit objectives; managing one or more departments; and supervising the use of funds. Utilization of significant resources from other work units is routinely required to perform the job's functions. There is a continual opportunity to significantly impact the organization's services.

WORKING ENVIRONMENT

The usual and customary methods of performing the job functions require the following physical demands:

Physical Demands Frequency Definitions Based on an 8-Hour Day:

Never = 0%

Seldom = 1-10% (<45 minutes)

Occasionally = 11-33% (up to 3 hours)

Frequently = 34-66% (up to 6 hours)

Continuously = 67-100% (more than 6 hours)

Seldom	Stooping/bending, climbing/balancing, kneeling, twisting back
Seldom/Occasionally	Pushing and pulling, reach above shoulder, reach at shoulder
Occasionally	Walking, standing, squatting/crouching, lifting and carrying up to 25 lbs. at waist height up to 25 feet
Occasionally/Frequently	Handling, simple grasping
Frequently	Lifting and carrying 0-10 lbs. overhead/shoulder height up to 25 feet, neck flexion/rotation, reach below shoulder, fingering/fine manipulation
Frequently/Continuously	Sitting up to one hour in intervals

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AUDITORY OR VISUAL REQUIREMENTS

Vision ability to see near, distant, color, depth and peripherally

ENVIRONMENTAL CONDITIONS

There is the potential for exposure to hazardous conditions when visiting sites when construction is occurring.

EXPERIENCE

Three years of progressively responsible, professional-level experience in the State of California school construction funding programs, school business management, or city/county planning relating directly to schools. One year of the experience must have been at the supervisory or management level with responsibility for multiple simultaneous medium to large size projects.

EDUCATION

A Bachelor's degree preferably in business, public, or educational administration, or related field.

REQUIRED TESTING

Pre-employment testing and assessment to demonstrate minimum qualifications required for the position.

LICENSES AND CERTIFICATES

Valid California Class C Driver's License; record of driving history issued by the California DMV on its Form H-6 less than 30 days prior to applying for the position.

CONTINUING EDUCATION/TRAINING

Participation in ongoing job-related training as assigned.

CLEARANCES

California Department of Justice (DOJ) and Federal Bureau of Investigation (FBI) background (fingerprint) clearance; pre-employment physical examination including Tuberculosis (TB) and drug screen clearances.

FLSA STATUS

Exempt

SALARY GRADE

Management