

FACILITIES PLANNING ANALYST

OVERALL JOB PURPOSE STATEMENT

Under the direction of an assigned manager, the job of Facilities Planning Analyst is done for the purpose/s of coordinating financing and planning of school construction and renovation projects, administering community facility districts, negotiating with public agencies on requests for easements, providing financing recommendations for the development of contracts for professional services, establishing and maintaining a system to administer maintain, and account for all bond program funds, including General Obligation bonds, Community Facilities Districts, statutory school fees and state school building program.

DISTINGUISHING CHARACTERISTICS

This job is distinguished from similar jobs by the following characteristics: The Facilities Planning Analyst is an advance-level and highly technical specialized classification responsible for analysis and decision-making in a variety complex and significant aspects of such district-wide programs as facility financing, construction and contracting, project planning and scheduling, and real estate. The scope of assignments includes managing, analyzing, coordinating and assessing information from source and secondary documents, including statutes, policies, rules, regulations, program guidelines and contract terms and conditions, and the development and application of financial accounting and forecasting principles, systems and techniques to the management of facilities and technology systems and projects. Positions in this classification attend meetings for the purpose of negotiating agreements and making decisions on behalf of the district when appropriate.

ESSENTIAL JOB FUNCTIONS

- Develop and monitor construction contracts, agreements and related project documents (e.g. new facilities, remodel projects, relocatable classrooms) for the purpose of maintaining the integrity of the contract and ensuring the availability of appropriate funds.
- Prepare/analyze/monitor contract finances, terms and conditions for the purpose of informing and recommending to assigned managers the financial and/or regulatory implications for consideration and action during the project decision-making process.
- Prepare funding applications in collaboration with project team (e.g. District administrators, department staff, legal counsel, architect, engineer, contractor, etc.) for the purpose of ensuring that new construction and modernization projects are completed in accordance with established schedules and approved budgets.
- Collaborate with property owners, developers, municipalities, utility companies and district consultants on real estate transactions for the purpose of finalizing purchase agreements, easements, deeds, title insurance and other documents.
- Collaborate with assigned managers, department staff and consultants to negotiate contract terms and conditions with consultants for the purpose of developing, coordinating, and finalizing agreements for submittal for Board action.

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- Collaborate with the program directors and project consultants in managing Community Facility Districts for the purpose of processing annexations of property to existing Community Facility Districts, forming new districts, analyzing and interpreting agreements and enabling terms and conditions, establishing accounts, collecting assessments, developing financial reports; and maintaining official files and records.
- Develop, implement, and maintain financial and information accounting and modeling systems to manage multiple projects and funding sources, including analyzing enrollment projections for determining implications for district facilities and technology requirements.
- Monitor/reconcile contract expenditures against approved contract and established funding for the purpose of verifying accuracy of payment requests, ensuring availability of funding for potential project costs and/or charges.
- Assists/orients/trains assigned staff for the purpose of ensuring their ability to carry out their assigned functions and duties
- Prepares a wide variety of written materials (e.g. Notices of Exemption, Notices of Determination, board agenda items financial reports) for the purpose of providing documentation for reference to others, initiating/recommending specific actions, providing recordation of project details for future reference, and/or addressing regulatory requirements.
- Research/develop/implement and maintain 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 all bond program funds.
- Review/research/analyze laws, regulations, legislation and policies for the purpose of assessing their potential impact on assigned program areas.
- Maintain a variety of files and records for the purpose of providing historical information for future reference, audit, and/or adherence to District and regulatory requirements.

OTHER JOB FUNCTIONS

- Performs other related duties as assigned.

ESSENTIAL JOB REQUIREMENTS – MINIMUM QUALIFICATIONS

Skills, Knowledge and Abilities

KNOWLEDGE is required to perform advanced math; review and interpret highly technical information, write technical materials and/or speak persuasively to implement desired actions; and analyze situations to define issues and draw conclusions. Specific knowledge required to satisfactorily perform the functions of the job includes: principles and practices used in school construction contracting and financing, real estate transactions, insurance, accounting and contracting with independent consultants; state codes and regulations and district policies related to school construction contracting, real estate transaction, insurance, contracting with independent consultants; methods and terminology used in contracting, real estate transactions, insurance and accounting; accounting and reporting on facility financing; budgeting and financial reporting; establish procedures and guidelines for gathering data to complete complex reports; modern office

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organization systems, practices, procedures, and equipment; district organization, operations, policies and objectives; correct English usage, grammar, spelling, punctuation and vocabulary.

SKILLS are required to perform multiple technical tasks with a need to periodically upgrade skills in order to meet changing job conditions. Specific skills required to satisfactorily perform the functions of the job include: interpreting public codes and policies; preparing formal documents of a financial and legal nature; planning and administering activities; problem solving; oral and written communications; operating standard office equipment including using pertinent software applications; performing accounting procedures; analyzing information from varied sources, and preparing and maintaining accurate records; applying tact, patience and courtesy during interactions with a wide range of different people from various organizations. as well as the public.

ABILITY is required to schedule a significant number of activities; routinely gather, collate, and/or classify data; and use basic job related equipment. Flexibility is required to work with others under a wide variety of circumstances; analyze data utilizing various processes, some of which may be undefined; and operate equipment using standard methods of operation. Ability is also required to work with a significant diversity of individuals and/or groups; work with data of different types and/or purposes; and utilize job related reference materials. In working with others, problem solving is required to analyze issues, create plans of action and reach solutions; with data it is significant; and with equipment it is limited. Specific abilities required to satisfactorily perform the functions of the job include: analyzing information to reach decisions, adapting to changing work priorities; communicating both orally and in writing with individuals and groups with diverse backgrounds and agendas; maintaining confidentiality; meeting deadlines and schedules; setting priorities; collaborating with individuals with varied technical background as part of a larger team, working in both indoor and outdoor environments, and working with detailed information/data. preparing and monitoring construction contracts and agreements; preparing specifications, procedures manuals, accounting and financial tracking systems correspondence and other written material; scheduling construction activities; conferring with architects, school and district administrators, contractors, government agencies and others; planning, organizing and maintaining complex technical record keeping, accounting and reporting systems for various district facility financing sources; preparing, organizing and conducting research and compiling data to complete complex reports; analyzing laws and regulations and recommending to managers revisions in policies; scheduling, organizing, and managing facility planning systems; understanding and using complex software programs; reading, interpreting, applying and explaining rules, regulations, policies, procedures, agreements, contracts and insurance policies; analyzing situations accurately and adopt an effective course of action; reading, understanding interpreting and applying agreements, contracts and insurance policies; working independently with little direction; planning and organize work, including the work of a small clerical staff; meeting schedules and time lines; establishing and maintaining cooperative and effective working relationships with others; maintaining records and preparing reports; operating a computer terminal, including spreadsheets, accounting programs, and databases.

Responsibility

Responsibilities include working under limited supervision; directing other persons within a small work unit; and monitoring the use of funds. Utilization of resources from other work units is often required to perform the job's functions. There is a continual opportunity to impact the Organization's services.

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Working Environment

- The usual and customary methods of performing the job's functions requires the following physical demands: some lifting, carrying, pushing and/or pulling; some climbing and balancing; some stooping, kneeling, crouching and/or crawling; significant reaching, handling, fingering and/or feeling. Generally the job requires 80% sitting, 10% walking and 10% standing. Most of the time the job is performed in an office environment under minimal temperature variations, a generally hazard free environment, and in a clean atmosphere. As required, the job is also performed at construction sites and incumbent will be subjected to ambient outside weather conditions and hazards found at building construction sites requiring use of safety hat, shoes, and other protective equipment as may be required at a site.

EDUCATION:

Bachelors degree from a recognized college with a major in business, public administration, urban planning, real estate, architecture, finance, accounting, or closely related field. Additional qualifying experience may be substituted for the required education on the basis of 30 semester or 45 quarter units of education for each additional year of experience.

EXPERIENCE:

Three years of professional experience, preferably in a California public school district, requiring the analysis, research and review of financial, administrative and facility planning support systems that include experience in urban planning, real estate finance, construction project management, or architectural planning, and experience in establishing and maintaining automated financial and management information and reporting systems.

REQUIRED TESTING:

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

LICENSES AND CERTIFICATES

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

None specified

CLEARANCES

Fingerprint Clearances issued by the California Department of Justice and the Federal Bureau of Investigation (FBI); TB Clearance. Pre-employment physical examination including negative drug screen.