

## 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 and Executive Director of Planning Services, the Director of Planning Services manages 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 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 and developing program and fund account budgets. 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 with 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 to projecting future facilities and technology needs and update the District's facilities and financing master plan.
- Administers various capital facility funds and community facility districts (CFD) to ensure 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 to ensure 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.
- Represents the district to the Office of Public School Construction, the State Department of Education, the County Office of Education and with other agencies to present, garner support for and gain funding and approval for projects, and tracking applications for documentation necessary to obtain State approval and funding.
- Coordinate information sharing and decision-making processes with elementary districts to resolve 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 to carry out the District's facilities master plan.
- Prepares applications to State and other funding agencies to initiate facility construction, upgrade and repair projects.

## DIRECTOR OF PLANNING SERVICES

- Communicates and 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 and 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 to determine appropriate rate, method and amounts of special taxes and fees.
- Attends meetings to convey the District's position on land use matters, joint use agreements and construction and improvement of sites.
- Prepares financial projections to determine the amount of revenue available to carry out the facility and technology master plans.
- Researches and analyzes laws, regulations, legislation and policies to assess their potential impact on the facility master plan, to recommend appropriate revisions to District policies and procedures and for to assist other staff in coordinating the updating and maintenance of appropriate Board policies and regulations.
- Plans and 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 to identify and incorporate all relevant issues into the development and implementation of plans for facility use.
- Selects, trains, supervises, evaluates, and directs assigned staff to ensure work activities, program goals and objectives are achieved, and District standards, policies, and procedures are maintained.
- Assists the Associate Superintendent, Business Services with researching alternatives for organizing and designing the delivery of facility projects.
- Performs other job-related duties as assigned.

## 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; 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

### DIRECTOR OF PLANNING SERVICES

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 of widely varied types and/or purposes; and utilize a variety of types of job-related equipment. 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; 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 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 long-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,

**DIRECTOR OF PLANNING SERVICES**

consultants, contractors and vendors; maintain records and prepare reports; operate a computer terminal.

**RESPONSIBILITY**

The person in this classification has responsibility in multiple areas including ensuring compliance with mandates, fiscal monitoring and managing a department. Utilization of significant resources from other work units is routinely required to perform the job’s functions. There is a continual opportunity to impact the organizations’ services.

**WORKING ENVIRONMENT**

This assignment requires the ability to travel to and from school sites to perform assigned duties on a regular basis. In addition, the usual and customary methods of performing the job’s functions require the physical demands outlined below. All requirements are subject to possible modification to reasonably accommodate individuals with a disability.

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	lifting up to 25 lbs. at waist height, carrying up to 25 lbs. up to 10 feet, reach above shoulder, pushing and/or pulling up to 50 pounds
Occasionally	handling/simple grasping; climbing, balancing, stooping, kneeling, crouching and crawling
Frequently	fingering/fine manipulation

**AUDITORY OR VISUAL REQUIREMENTS**

Auditory ability to communicate with coworkers, staff, contractors and others contacted within the course of performing the essential functions of the job. Vision ability to see near, distant, color, depth and peripherally.

**ENVIRONMENTAL CONDITIONS**

This job is performed in a generally clean and healthy environment. In the course of performing assigned duties, the incumbent will occasionally be required to: walk on uneven ground, tolerate exposure to dust, gas, fumes, noise, vibration, extremes in temperature and humidity, biohazard materials such as sewage and some hazardous conditions while at school sites during construction activities. Incumbents will be required to operate a motor vehicle requiring a California Class C driver’s license to travel to and from various District school sites and meeting locations.

**EDUCATION**

A Bachelor’s degree preferably in business, public, or educational administration, or related field is required.

**DIRECTOR OF PLANNING SERVICES**

**EXPERIENCE**

Three years of progressively responsible, professional-level experience in State 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.

**REQUIRED TESTING**

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

**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**

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 RANGE**

Management Range 2