

## PLANNING SPECIALIST

### Purpose Statement

Under the direction of the Director of Planning and Construction or other Planning Department management level staff, perform a wide variety of advanced and complex clerical and technical duties, and one or more specialized administrative support duties related to Planning and Development operations.; serve as a liaison between consultants, bidders, contractors, administrators, faculty, staff, students, parents and the public.

### Essential Functions

- Provide administrative support for project managers including: maintaining project files, downloading and filing digital pictures, creating requests for proposals and requests for qualifications, assemble review panels, attending meetings, creating and distributing meeting minutes, compiling bidding and contract documents, coordinating projects with the Purchasing Department, monitoring project budgets, assisting sites with purchasing furniture and equipment, maintaining electronic databases, act as a liaison between consultants, sites, approval agencies, inspectors, contractors and other parties involved in the project.
- Perform a wide variety of specialized clerical and technical duties to support the supervisor; type a variety of correspondence, memoranda, requisitions, contracts and bid specifications, reports, board agendas, and forms; maintain calendars and schedules of meetings, appointments and conferences.
- Serve as a liaison between consultants, bidders, contractors, administrators, faculty, staff, students, parents and the public; explain and monitor program, policies and procedures; initiate and answer telephone calls; screen and route calls; respond to inquiries and provide information; retrieve and respond to messages as appropriate.
- Prescreen and qualify vendors; negotiate pricing and discuss method of shipping, delivery time and other related information with vendors; create and maintain accurate vendor records.
- Collect bid data; prepare bid specifications; invite bids; and administer contract award.
- Prepares and processes documents (bid process, bid evaluation, design agreements, work authorizations, addendums, and other necessary document for contracting purposes).
- Compile information and prepare and maintain a wide variety of data and reports according to established procedures and time lines; participate in special projects and research to support the supervisor's area of responsibility.
- Prepare, maintain and monitor budget information for assigned projects; process budget transfers; monitor expenditures for contract limitations; create and monitor requisitions.
- Create and maintain project/management files in construction software project management system; create user accounts and provide training.
- Monitor the project close-out process including certification by the Division of State Architect.
- Research current laws, codes, rules and regulations related to assigned activities and projects.

- Prepare and maintain a variety of records related to assigned activities; establish and maintain filing systems; attend meetings, take notes and prepare summary of minutes as requested for the Planning & Construction Department.
- Maintain files for the state funding approval process through the Office of Public School Construction, Department of Education, Department of Toxic Substances Control and other approval agencies; act as a liaison between the project manager, site, consultants and approval agencies.
- Maintain files on cellular communication sites and leases; act as liaison between cellular communication companies and school sites, Maintenance and Operations, and Finance; monitor leases for compliance with reporting requirements.
- Assist the Grants Office in compiling information for and completing grant applications for capital improvement financing; monitor state and federal legislation for facilities financing opportunities.
- Maintain files and agreements for facilities use; instruct site staff on facilities use procedures; process facilities use applications; monitor compliance with facilities use regulations including insurance certificates; receive facilities use payments and process through Finance; keep facilities use board policies and administrative regulations up to date.
- Maintain files and monitor contracts. Review contracts for completeness. Ensure that insurance certificates and other required documentation is current.
- Maintain database of sites and buildings; prepare and maintain site maps; prepare and maintain capacity calculations; maintain the district's unused site list for reporting to the state; confirm that Finance and Maintenance are aware of any changes in facilities and sites.
- Maintain database of facilities leased by the district; coordinate leases with purchasing and other departments; prepare annual board items and requisitions for leases; ensure that insurance requirements are current.
- Maintain liaison between district and outside architectural, engineering and landscape firms, contract consultants, community groups, and other local, state, and federal agencies.
- Monitor student enrollment and capacity; obtain enrollment data from feeder districts; estimate enrollment projections.
- Respond to public records requests and requests from public agencies such as the Department of Labor, Office of Public School Construction, and the Internal Revenue Service.
- Operate a variety of office equipment including a copier, fax machine, typewriter, and a computer and assigned software.

**Other Functions**

- Performs other related duties, as assigned, for the purpose of ensuring the efficient and effective functioning of the work unit.

**Job Requirements: Minimum Qualifications**

**Knowledge and Abilities**

KNOWLEDGE OF: Policies, objectives and guidelines related to assigned planning and construction functions. Correct English usage, grammar, spelling, punctuation and vocabulary.

Oral and written communication skills. Basic research methods. Operation of a computer and assigned software. Interpersonal skills using tact, patience and courtesy. Methods of collecting and organizing data and information. Business letter and report writing techniques. Modern office practices, procedures and equipment. Basic math.

ABILITY TO: Perform a wide variety of clerical and secretarial duties to relieve the supervisor of administrative and clerical detail. Serve as a liaison between administrators, faculty, staff, students, parents and the public. Communicate effectively both orally and in writing. Establish and maintain cooperative and effective working relationships with others. Learn applicable sections of the State Education Code and other applicable laws. Learn District organization, operations, policies and objectives. Interpret, apply and explain applicable laws, codes, rules, regulations, policies and procedures. Type at a minimum of 50 words per minute from clear copy. Compile and verify data and prepare reports. Maintain confidentiality of sensitive and privileged information. Complete work with many interruptions. Compose correspondence and written materials independently or from oral instructions. Establish and maintain a variety of filing systems.

Operate a variety of office equipment including a computer and assigned software.

Train and provide work direction to others.

**Education And Experience**

Any combination equivalent to: graduation from high school and three years of clerical or secretarial experience involving frequent public contact.

**Working Environment**

Office environment.

Constant interruptions.

**Physical Demands**

Dexterity of hands and fingers to operate a computer keyboard.

Hearing and speaking to exchange information in person or on the telephone.

Sitting for extended periods of time.

Seeing to read a variety of materials.

Bending at the waist, kneeling or crouching to file materials.

**Required Testing**

Pre-employment Proficiency Test.

**Certificates & Licenses**

Valid California Driver’s License/Evidence of Insurability.

**Continuing Educ./Training**

None Specified

**Clearances**

Criminal Justice Fingerprint/Background Clearance.

*Sweetwater Union High School District programs and activities shall be free from discrimination based on gender, sex, race, color, religion, ancestry, national origin, ethnic group identification, marital or parental status, physical or mental disability, sexual orientation or the perception of one or more of such characteristics. SUHSD Board Policy #0410*