

**JOB DESCRIPTION**  
**San Diego County Office of Education**

**School Facilities Planning Analyst**

**Purpose Statement**

The job of School Facilities Planning Analyst is done for the purpose/s of providing support to department activities with specific responsibility for assisting in providing consultation and support to districts in areas related to the school facilities planning, construction, maintenance and operations and other special programs.

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**Essential Functions**

- Analyzes contract information (e.g. escrow account at Union Bank, JPA project budget accounts, etc.) for the purpose of identifying potential budget variances, compiling statistical information, developing procedures, and conforming to established financial practices and regulatory requirements.
- Compiles a wide variety of contract information related to school facilities (e.g. contracts, project agreements, annual reviews, etc.) for the purpose of providing required documentation and/or processing information.
- Creates and maintains a wide variety of files and records for the purpose of ensuring the availability of documentation and compliance with established policies and regulatory guidelines.
- Monitors account balances and related financial activity (e.g. escrow activity, project agreements, etc.) for the purpose of ensuring that allocations are accurate, related revenues are generated, expenses are within budget limits and/or fiscal practices are followed.
- Participates in meetings, professional learning, and seminars (e.g. training on PeopleSoft, Hyperion processes and procedures, etc.) for the purpose of conveying and/or gathering information required to perform job functions.
- Prepares a wide variety of written materials and electronic information related to school facilities construction, maintenance and operations (e.g. board items, contracts, bid advertisement, collection of deposits/distribution of bid packets, etc.) for the purpose of documenting activities, providing reference, conveying information, and complying with established financial, legal and/or administrative requirements.
- Provides orientation and support to other departmental personnel regarding procedures and program requirements (e.g. JPA and County Departments, etc.) for the purpose of ensuring efficient processing in compliance within policy and established regulatory guidelines.
- Recommends policies, procedures and/or actions on issues that relate to accounting functions for the purpose of providing direction and/or decision making.
- Researches and identifies funding opportunities for the purpose of providing information to districts on potential opportunities to meet the school facility needs.
- Responds to inquiries from a wide variety of sources (e.g. districts administrators, vendors, auditors, etc.) for the purpose of facilitating communication and/or providing guidance among several parties; providing information and/or referral for addressing inquiry.

**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**

### **Skills, Knowledge and Abilities**

SKILLS are required to perform single, technical tasks with a potential need to upgrade skills in order to meet changing job conditions. Specific skill based competencies required to satisfactorily perform the functions of the job include: applying district, state and federal policies and regulations; operating standard office equipment including pertinent software applications; performing accounting procedures; and preparing and maintaining accurate records; analyzing budgets; analyzing data; auditing financial reports; classifying data and/or information; using pertinent software applications.

KNOWLEDGE is required to perform algebra and/or geometry; read a variety of manuals, write documents following prescribed formats, and/or present information to others; and solve practical problems. Specific knowledge based competencies required to satisfactorily perform the functions of the job include: accounting/bookkeeping principles and budget processing;.; business telephone etiquette; codes/laws/rules/regulations/policies; concepts of grammar and punctuation; cost/fund accounting; keyboarding; office application software; practicing cultural competency while working collaboratively with diverse groups and individuals; recordkeeping and record retention practices.

ABILITY is required to schedule activities and/or meetings; gather and/or collate data; and use job-related equipment. Flexibility is required to work with others in a wide variety of circumstances; analyze data utilizing defined but different processes; and operate equipment using standardized methods. Ability is also required to work with a wide diversity of individuals; work with a variety of data; and utilize job-related equipment. Problem solving is required to identify issues and create action plans. Problem solving with data frequently requires independent interpretation of guidelines; and problem solving with equipment is limited. Specific ability based competencies required to satisfactorily perform the functions of the job include: establishing and maintaining effective working relationships; maintaining confidentiality; setting priorities; meeting deadlines and schedules; working with detailed information; and adapting to changing priorities; accuracy and attention to detail; communicating with diverse groups; working as part of a team; working with detailed information/data.

### **Responsibility**

Responsibilities include: working under limited supervision following standardized practices and/or methods; directing other persons within a small work unit; monitoring budget expenditures. Utilization of some resources from other work units is often required to perform the job's functions. There is some opportunity to impact the organization's services.

### **Working Environment**

The usual and customary methods of performing the job's functions require the following physical demands: some lifting, carrying, pushing, and/or pulling, some stooping, kneeling, crouching, and/or crawling and significant fine finger dexterity. Generally the job requires 90% sitting, 5% walking, and 5% standing. This job is performed in a generally clean and healthy environment.

Experience Job related experience is required.

Education Bachelors degree in job-related area.

Equivalency

Required Testing

Certificates

Driver's License & Evidence of Insurability

Continuing Educ./Training

Clearances

Criminal Justice Fingerprint/Background  
Clearance

Proof of physical examination including TB  
Screen

FLSA State: Exempt

Salary Range: Classified Management, Grade 35

**Personnel Commission Approved:** October 19, 2016