

**Human Resources
POSITION DESCRIPTION (HR 120)**

CLASSIFICATION:	Planner/Estimator/Scheduler	DEPT:	Facilities Planning and Capital Projects
WORKING TITLE:	Planner/Estimator/Scheduler	FLSA:	Non-Exempt
		INCUMBENT:	

PURPOSE:

The Facilities Management and Development (FM&D) organization is a unit within the Administration and Finance division and is responsible for the management, operations, and development of facilities on the university campus. The Planner/Estimator/Scheduler works within the Facilities Planning and Capital Projects (FPCP) department of FM&D, which provides project planning, architectural design/coordination, construction, project management services, campus master planning, and space management for Cal Poly.

Under the general supervision of the Associate Director of Minor Projects, the position is a member of the project management team handling projects up to \$656,000. The Planner/Estimator/Scheduler will perform a full range of planning, estimating and scheduling functions and provide project management support for a wide range of campus construction, renovation, repair, and maintenance projects.

DUTIES AND RESPONSIBILITIES:

The following examples illustrate typical work activities and are not meant to be all inclusive or restrictive:

ESSENTIAL JOB FUNCTIONS

Planning / Estimating / Scheduling	Daily	75%
<ul style="list-style-type: none"> Coordinate the development of work orders and schedule work generated from FAMIS facility management software system. Perform tasks involved in the complete operation of the FAMIS system, including analyzing, planning, estimating and scheduling work to be accomplished in line with accepted trade practices, pertinent specifications, drawings and sketches. Serve as the point of contact for campus clients, vendors, contractors and Facilities staff for issues regarding projects. Collect and/or review information from various staff members and trade foremen; use such information in developing material lists that are complete and accurate; cost estimates for labor and materials that are complete and reliable; and schedule the sequence of work required to complete a job across all Facilities departments, as appropriate. Develop detailed scope of work and conceptual time line for all assigned projects. Forecast workloads based on FAMIS scheduling module. Provide bi-weekly labor schedule for Union Trades. Utilize other scheduling software such as Microsoft Project to produce quarterly project status reports of university projects. Using various reporting tools, provide reports relating to workloads and allocations of labor. Coordinate the development of work orders; make material requests; check materials as they are delivered to assure they meet job requirements; ascertain that all materials are on hand or will be available when needed on a particular job; check availability of staff to perform the work; arrange for access to the job facility by contacting the person responsible for use of that area; and schedule jobs. Provide reports relating to workloads and allocations of labor. Evaluate and provide recommendations relating to the operational needs of Facilities. Write reports and prepare and/or conduct project presentations. Monitor, review and analyze the schedule and status of construction during all phases of projects, including the analysis of any schedule deviations and corrective actions. Analyze the results of status input, review results with project/site staff and determine and agree upon any necessary schedule modifications. Prepare project proposals for University clients and contractors. Prepare various cost estimates from very preliminary information through construction documents (conceptual, preliminary, schematic, design development, construction documents and fair cost estimates for change orders). Develop and maintain project or program schedules for assigned jobs. Review, analyze and prepare detailed comments on design and /or contractor-generated construction baseline schedules, and monthly updates. Arrange planning meetings with clients, contractors, architects, engineers and Facilities staff to determine project requirements and secure project reviews and approvals with all necessary campus departments. Research available products, materials and services required to optimize project implementation. Maintain project files and information, both electronic and hard copy files. Identify significant schedule risks and report issues to Facilities project management team. 		

Project Management Support**Daily****25%**

- Create and update project progress schedules and confer with project personnel to help facilitate problem resolutions.
- Obtain quotes for materials, tools, and equipment and may prepare purchase requisitions for purchase orders.
- Follow-up at the end of a project to close any loops, complete project folder close out.
- Prepare and compare preliminary and final specifications to other construction documents, develop/maintain campus standards and specifications.
- Perform project management duties for small-scale, less complicated maintenance and renovation projects, including prepare drawings and sketches with scope of work descriptions, labor and quality of materials information.
- Work with the team in the development of appropriate baseline costs and timeline (schedule) estimates for projects.
- Assist in planning, scheduling, and generating construction cost estimates for facility improvement projects, working closely with staff to produce estimates at each design/build phase (as needed).
- Assist with cost history tracking systems for construction projects.
- Arrange peer reviews and coordinate project meetings.
- Collaborate with Project Managers to provide as-built drawings for Facilities Plan Room in AutoCAD format for campus atlas updates.
- Assist in implementation of technology solutions.
- Participate in the development, planning, and implementation of projects programming criteria, procedures, and standards.
- Support Facilities business development and marketing activities as they relate to proposed project information and scheduling.
- Assist Projects Managers with the preparation of plans and specification for bid packages.
- Assist in the tracking and forecasting of department project workloads.
- Provide training for campus customers and various departments on the minor capital project process.
- Assist in the prequalification of contractors as well as other tasks related to bidding projects.

OTHER JOB FUNCTIONS**As Needed****5%**

- Attend training and maintain skill currency as appropriate to safely and effectively complete assignments.
- Assist Facilities staff with project-related and department/division operational matters.
- Perform other job-related duties and special projects as assigned.

MINIMUM QUALIFICATIONS:

EDUCATION AND EXPERIENCE: Equivalent to graduation from a four-year college or university in engineering, architecture, business management, plant management, industrial technology or public administration, AND two years of journey level experience in more than one building or mechanical craft trades (additional qualifying experience may be substituted for the required education on a year for year basis).

LICENSES, CERTIFICATES, DEGREES, CREDENTIALS: Possession of (or ability to obtain by date of hire) a valid California Driver's License.

REQUIRED QUALIFICATIONS (SKAs):

- General knowledge of a wide range of facilities management operations and general knowledge of building codes, laws, ordinances and regulations, and trades applicable to building construction, maintenance, and repair.
- Working knowledge of organizational and management structures and experience in complex organizational settings.
- General knowledge of building materials, costing procedures and the sequential methods of modern construction and maintenance practices.
- Knowledge of administrative concepts, practices and procedures to research, develop, and evaluate policies and programs, including collection, evaluation and interpretation of data/information from a wide variety of sources to develop sound, defensible conclusions and make appropriate recommendations.
- Thorough knowledge of English grammar, spelling and punctuation.
- A general knowledge of business mathematics and basic statistical techniques.
- Excellent communications skills, both verbally and in writing – proven ability to effectively communicate information in a clear and understandable manner.
- Demonstrated ability to draft and compose correspondence and standard reports; as well as building and maintaining complex schedules.
- Ability to read and understand proposals, plans, blueprints, process drawings, contracts, purchase orders, and specifications for all phases of construction and building maintenance.
- Ability to prepare small-scale project drawings and sketches with scope of work descriptions.
- Excellent computer skills and proficiency with a variety of computer applications including word-processing, spreadsheets, databases, on-line systems, Internet as well as online calendaring and email.
- Excellent organizational and time management strategies with the ability to set own priorities to coordinate multiple assignments and meet fluctuating and time-sensitive deadlines.

- Demonstrated customer service experience requiring a very high level of diplomacy and professionalism.
- Demonstrated skill in providing meticulous follow-through for all assignments and the ability to perform detailed work with a high degree of accuracy and efficiency.
- Ability to analyze data and making accurate projections using business mathematics and basic statistical techniques.
- Ability to anticipate problems and addressing them proactively; expertise in investigating and analyzing problems with broad administrative impact and implications.
- Demonstrated ability to maintain a high degree of confidentiality and professionalism with handling confidential information with discretion and sensitivity.
- Ability to work in a group setting to convey information and mediate differences.
- Ability to use tact and diplomacy to effectively handle a broad range of project-related and interpersonal situations with persons from varied backgrounds and diverse personalities, and respond appropriately to conflicts and problems.
- Ability to initiate, establish, and foster communication and teamwork by maintaining a positive, cooperative, productive work atmosphere in and outside the University with the ability to establish and maintain effective working relationships within a diverse population and with those from various cultural backgrounds.
- Ability to work under pressure with minimum supervision.
- Ability to apply a high level of judgment and discretion on a consistent and continuing basis.
- Ability to produce PowerPoint presentations and effectively conduct oral presentations to groups; and the ability to train and communicate to Facilities staff on new skills and procedures.
- Ability to adapt to the dynamics of organizational, procedural, technological and policy changes.
- Working knowledge of or ability to quickly learn the organizational and functional structure of Facilities, the University, and the California State University system.

PREFERRED QUALIFICATIONS:

- Demonstrated knowledge/experience of construction and facilities management.
- Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.
- Experience using a computerized Facilities Management information system; e.g., FAMIS.
- Experience using CAD software; e.g., AutoCAD.

SPECIAL CONDITIONS:

- Must be able to successfully pass a pre-employment background check.
- Must be able to work overtime, including weekends, evenings and occasional holidays, and adjust working hours to meet special projects. May be called back periodically to perform work as needed on an emergency basis.
- Must be willing to travel and attend training programs off-site for occasional professional development.
- The person holding this position is considered a 'mandated reporter' under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.
- This position classification has been defined as non-exempt and is subject to overtime provisions of the Fair Labor Standards Act (FLSA).

Facilities Planning & Capital Projects - Organization Chart

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