



**JULY 2012**  
**FLSA: EXEMPT**

## **PLANNER/SCHEDULER**

*This class specification indicates, in general terms, the type and level of work performed as well as the responsibilities of employees in this classification. The job functions described are not to be interpreted as being all-inclusive to any specific employee.*

### **DEFINITION**

Under general direction, performs a variety of scheduling duties involving the construction and maintenance of wastewater treatment and collection systems at the District; manages field contractors' schedules to evaluate reporting requirements needed for effective contractor performance; establishes clear specifications and enforcement provisions with the contractors by placing schedule performance and proof of impact on the contractors; analyzes and monitors time impact delay events, determining whether these events are compensable to the contractor, as well as how these delays might effect the completion of the project, others projects, and the effectiveness of the District's treatment and collection systems; performs other duties as assigned.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general direction from assigned supervisory and/or management staff. Exercises no supervision of staff. May coach and/or mentor less experienced staff.

### **CLASS CHARACTERISTICS**

This class is responsible for developing and coordinating schedules for Capital Improvement Program (CIP) construction and maintenance projects to ensure the timely completion of projects and to reduce negative impacts on the District's treatment and collection systems. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit, and may lead lower level staff on programs and projects. Work is normally reviewed only on completion and for overall results. Responsibilities may include guidance on programs and/or projects and leads by example. This class is distinguished from the Cost Estimator in that the latter is responsible for preparing cost estimates to provide detailed information regarding quantity and cost of materials and labor to ensure optimal use of available resources.

### **EXAMPLES OF ESSENTIAL JOB FUNCTIONS** (Illustrative Only)

*Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Acts as liaison on scheduling matters between different District divisions/departments and other project stakeholders in order to coordinate construction project schedules to reduce negative impacts on the efficiency of treatment and collections systems.
- Reviews baseline schedule and design submittals prior to bid to ensure scope is achievable in the time stipulated.
- Provides necessary advice to contractors within the terms of the contract through the development and maintenance of a professional working relationship.
- Monitors actual progress versus planned progress, provides exception reporting, and recommends action steps to resolve issues.

- Defines and optimizes critical paths.
- Prepares time impact analyses of changes and unforeseen events.
- Seeks innovation in scheduling and execution plans to improve project economics; works with contractors and other District staff to ensure best application of integrated project controls.
- Responds to the needs of the Engineering and Operations & Maintenance Divisions related to project scheduling issues.
- Maintains careful documentation of all schedule submittals so that any requests for time adjustments can be measured against the approved schedule in place at the time of impact.
- Attends contractor meetings; provides schedule risk analysis; and assists with establishing schedule milestones for assigned projects.
- Provides key performance indicators required for Project Management Office reporting; participates in the development and implementation of standards used; researches and recommends quality improvement standards.
- Prepares analytical and statistical reports on operations and activities.
- As assigned, may lead lower level staff on programs and projects.
- Attends and participates in professional group meetings; stays abreast of new trends and innovations in the field of project planning and scheduling.
- When assigned to programs and/or projects, provides leadership and guidance to others. As a program and/or project leader, may direct, assign, train, monitor and review the work activities of team members; determines work priorities; oversees quality and quantity of work performed and ensures adherence to established procedures by instructing employees accordingly; is a reference to employees by possessing specialized skills; develops and implements work improvements.
- Performs related duties as required.

## **QUALIFICATIONS**

### **Knowledge of:**

- Principles of project plan scheduling for large construction-based projects.
- Project construction environment related to construction contractor situations.
- Principles of project control techniques and methods.
- Principles and applications of critical thinking and analysis.
- Principles, practices, and terminology of construction specifications and methods of operation.
- Principles, practices, and techniques of project management.
- Methods, materials, and techniques used in the design and construction of wastewater projects.
- Methods and techniques of engineering plan review and analysis.
- Methods and techniques of contract negotiations and administration.
- Principles and techniques of Critical Path Method (CPM) scheduling.
- Principles of the methods and techniques of computer aided drafting and other technical engineering-specific software and database management tools.
- Principles of work breakdown structures.
- Technical report writing and preparation of correspondence.
- Principles and procedures of record keeping.
- Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Principles of mathematics and their application to project controls systems work.
- Modern office practices, methods, and computer equipment and applications related to the work, including word processing, database, and spreadsheet applications.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing the District in contacts with governmental agencies, community groups, various business, professional, educational, and regulatory organizations, and with property owners, developers, contractors, and the public.

- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and District staff.

**Ability to:**

- Perform work of a specialized nature requiring the ability to use independent judgment and personal initiative.
- Lead lower level staff on programs and projects.
- Interpret complex facility construction contract documents.
- Review submittals and equipment conformance to design specifications and plans.
- Apply critical thinking and analysis to a broad range of situations.
- Perform analysis of change orders; negotiate fair and reasonable costs for change orders and prepare the accepted changes.
- Act as liaison between various project divisions that oversee construction project schedules.
- Interpret consultant design documents and complex facility construction documents.
- Provide necessary advice to contractors within the terms of the contract.
- Identify problems, research and analyze relevant information, develop and present recommendations and justification for solution.
- Use critical thinking techniques in determining problem resolutions.
- Prepare memos and technical reports.
- Develop, manage, analyze, and utilize relevant database systems.
- Maintain confidentiality in maintaining critical and sensitive information, records, and reports.
- Provide recommendations on methods to perform job effectively.
- Provide exception reporting and recommend actions.
- Define and optimize critical paths.
- Provide key performance indicators required for PMO monthly reporting.
- Prepare clear and concise technical reports and documentation.
- Make sound, independent decisions within established policy and procedural guidelines.
- Interpret, apply, explain, and ensure compliance with Federal, State, and local policies, procedures, laws, rules, and regulations.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and software programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines.
- Establish, maintain, and foster positive and harmonious working relationships with those contacted in the course of work.
- Demonstrate safe work practices and procedures in the workplace.
- Train others in proper work procedures and lead by example.

**Employment Standards:**

Any combination of education and experience that provides the required knowledge, skills, and abilities may be qualifying as determined by OCSD.

1. Possession of a bachelor's degree from a college or university which is accredited by the US Department of Education, with major coursework in engineering, or a related field; AND,
2. Five (5) years of increasingly responsible experience planning or scheduling with large construction-based projects, or related experience.

**License or Certificate:**

- Possession of, or ability to obtain, a valid California Driver's License by time of appointment.

**Disaster Service Workers:**

All Orange County Sanitation District employees are designated Disaster Service Workers through state law (California Government Code Section 3100-3109). Employment with the Orange County Sanitation District requires the affirmation of a loyalty oath to this effect. Employees are required to complete all related training as assigned, and to return to work as ordered in the event of an emergency.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various District and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This is primarily a sedentary office classification although standing in and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects weighing up to 25 pounds.

**ENVIRONMENTAL ELEMENTS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.