



**AUGUST 2018**  
**FLSA: EXEMPT**

## **SENIOR 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 supervision or direction, performs a variety of complex 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 affect the completion of the project, other projects, and the effectiveness of the District's treatment and collection systems.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general supervision or direction from the assigned supervisory and/or managerial staff. Exercises no direct supervision of staff. May exercise functional and technical leadership in assigned workgroups or teams and may coach and/or mentor less experienced staff.

### **CLASS CHARACTERISTICS**

This classification is the second of two (2) levels within the engineering planning/ scheduling job series and is responsible for developing and coordinating project controls and schedules for the most complex 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. Employees at this level provide technical leadership for project schedule development and analysis; perform more difficult assignments and projects; receive only occasional instruction or assistance as new or unusual situations arise; and have full and thorough knowledge of the concepts, practices, procedures, and policies of the assigned function. Responsibilities may include providing guidance on programs and/or projects. Work is normally reviewed only on completion and for overall results. Responsibilities may include oversight of programs and/or projects; serving as an expert internal consultant; serving as a lead worker, making and reviewing assignments; planning and scheduling, earned value management, change control, report development, problem identification and resolution, guidance on programs and/or projects to support and influence time and cost outcomes of a project or program.

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

*The following essential job functions are typical for this classification. Incumbents may not perform all of the listed job functions and/or may be required to perform additional or different job functions from those set forth below to address business needs and changing business practices.*

- Prepares and analyzes construction schedules and cost reports; distributes progress evaluations to Project Managers and Engineers.
- Ensures established safety precautions are adhered to, corrects unsafe work conditions/practices, and/or reports unsafe work conditions/practices to assigned supervisory or managerial staff.

- Acts as liaison on scheduling matters between different District divisions/departments and other project stakeholders in order to coordinate complex 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; serves as functional lead to create preliminary construction schedules during project planning phases, at times based on minimal information.
- Provides technical review of baseline and update construction schedules to ensure contractor compliance with project requirements for cost and resource loading and to identify any deficiencies in sequence, contract requirements, or project management tracking software.
- Develops and publishes analytical and statistical reports such as construction status reports, project completion forecasts, projected cash flow, construction expenditure forecasts, cost trends, and construction sequencing for the division/department and other project stakeholders.
- Reviews contract change orders for complex projects; produces construction time impact analyses; and provides recommendations to stakeholders on issues involving construction delays.
- Performs analysis and provides recommendations for monthly construction progress payment requests on complex projects; monitors actual progress versus planned progress; provides exception reporting; and recommends action steps to resolve issues.
- Defines and optimizes critical paths.
- Develops negotiation strategy on large delay claims with Construction Management and Contract Management staff.
- 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.
- 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.
- Reviews and advises supervision on revisions to Engineering Design Guidelines related to construction scheduling.
- Develops policies and procedures for construction scheduling using best practice methods including developing and maintaining master project specifications for project scheduling.
- Leads meetings to coordinate project efforts between multiple divisions and departments, including outside agencies, District consultants, and contractors.
- 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.
- Provides basic training on schedule requirements for large wastewater and collections systems projects to District staff and consultants.
- May lead and provide work direction to 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; researches emerging products and enhancements and their applicability to District needs.
- Provides leadership and guidance to others on assigned programs and/or projects. As a program and/or project leader, may direct, assign, train, monitor and review the work activities of team members; determines work priorities; makes recommendations on project assignments; oversees quality and quantity of work performed and ensures adherence to established procedures by instructing employees accordingly; is a resource to employees by possessing specialized skills; develops and implements work improvements.
- Performs related duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

- Principles of project plan scheduling, data management and planning 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, time impact analysis and work breakdown structures.
- Methods and techniques of contract negotiations and administration.
- Methods and techniques of Time Impact Analysis (TIA) for construction delays.
- Principles and techniques of Critical Path Method (CPM) scheduling.
- Principles and techniques for resource loaded schedules.
- Methods and techniques for Work Breakdown Structures (WBS).
- Methods and techniques for earnings projections and cash flow reporting.
- Principles of the methods and techniques of computer aided drafting and other technical engineering-specific software and database management tools.
- 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.
- Principles and practices of customer service and techniques for effectively communicating 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.
- Prepare and review complex technical schedules and provide analysis and recommendations.
- Lead lower level staff on programs and projects.
- Interpret complex facility construction contract documents.
- Review submittals and equipment conformance to design specifications and plans.
- Read and understand technical drawings and specifications.
- Apply critical thinking and analysis to a broad range of situations and in problem solving.
- 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.
- Interpret and analyze time, cost, and resource data presented in reports, charts and diagrams.
- 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.

- Prepare memorandums 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.
- Compile, analyze and report on key performance indicators.
- 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.
- Adhere to safe work practices and procedures in the workplace.
- Operate a motor vehicle and travel to various District sites, projects and/or meetings.
- Utilize a computer, relevant software applications including professional project management and database software, and/or other equipment.
- Effectively 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 effective working relationships with those contacted in the course of work.
- Train others in proper work procedures.

**Employment Standards:**

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

1. Bachelor's degree from a college or university accredited by the U.S. Department of Education, with major coursework in engineering, construction management, or a related field; AND,
2. Eight (8) years of increasingly responsible experience planning or scheduling with large and complex construction-based projects, including three (3) years at a level comparable to a Planner/Scheduler.

**Licenses and/or Certificates:**

- Valid California Class C Driver's License.

**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; ability to travel to various District sites, projects and/or meetings; 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 10 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.