



CLASS TITLE: FACILITIES ANALYST

WORK YEAR: 12 Months

VACATION: 27 Days

REPORTS TO: Director, Facilities Planning & Development

BASIC FUNCTION:

Under the direction of the Director of Facilities Planning & Development, provide specialized assistance in the support of the District's Capital Facilities Program which includes: professional level accounting, land acquisition, new construction, modernization and reconstruction; assist performing specialized tasks conducting a variety of studies and preparing related reports; provide support according to projects assigned; assist in preparing and monitoring complex project budgets; accounting activities, assist in updating the facilities master plan, and assist in the preparation of planning and construction documents; perform moderate analytical, technical, and administrative work. Oversight of the office budget staff; demographics analysis; provide support to all projects; assist with project management, purchase orders and contracts.

DISTINGUISHING CHARACTERISTICS:

This single position classification has delegated responsibilities for the review and processing of professional level accounting practices and analysis within the area of facilities planning and development. Manages a variety of State forms, documents and project responsibilities for the capital facilities program. The duties are performed with considerable independence.

REPRESENTATIVE DUTIES:

- Plans, prepares and analyzes budget, cash flow, and fiscal reports; reconciliation of project funds; monitors and controls budgeted revenues and expenditures.
- Prepares delivers presentations; interacts directly with administrators, program managers and other district personnel regarding accounting, budget, and other financial information.
- Oversees specialized studies which include but are not limited to annual enrollment projections, annual development analysis, bi-annual fee justification study, annual schools facilities needs analysis, new site analysis reports, and annual facilities use and capacity analysis.
- Completes and submits State Allocation Board (SAB) forms within required timelines; receives and logs SAB approvals; submits amended forms to update data and

maintain eligibility with SAB; answers questions on the classification and processing of documents of SAB projects; secures funding for capital facilities projects as directed

- Assists with construction projects, including preparing and maintaining project budgets and expenditure reports, works closely with Purchasing Department and Business Services for all budget related actions; interprets project plans; attends project planning and construction meetings as needed.
- Reviews and comments on environmental documents and performs all tasks related to California Environmental Quality Act (CEQA) and Department of Toxic Substances Control (DTSC).
- Process incoming requests for expenditures and related correspondence and transfers; verify availability of funds, correct budget codes, completeness of paperwork and signatures.
- Prepares a variety of comprehensive financial statements; reviews and corrects department and project budget and expenditure transfers; verifies account numbers and related information; analyzes budget documentation to assure that expenditures are properly charged and do not exceed appropriations; makes recommendations accordingly.
- Answers questions and provides a variety of information and assistance to District and other personnel regarding budgets, accounts and related information; provides technical expertise and direction regarding accounting issues and discrepancies; coordinates activities such as: meetings, committees etc. with other departments and District personnel.
- Applies approvals of electronic documents including requisitions and appropriation transfers; determines documents requiring approval and reviews documents for accuracy and completeness, processes and confirms approvals.
- Analyzes data and prepares projections, financial statements and reports providing statistical and financial information
- Performs related duties as assigned
- Preferred knowledge of geographic information system platform, ArcMap software
- Attends project planning and construction meetings as needed
- Attends project construction site visits and reviews as needed
- Coordinates and organizes Citizen Bond Oversight Committee meetings and reports
- Assists in preparing enrollment projection data and reports

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

- Applicable federal, state, county, local municipal laws
- Interpret Title 5 and Education Code related to school facilities
- State Allocation Board and Office of Public School Construction programs and forms.
- School facilities construction and bidding processes.
- Interpretation of maps, enrollment projections and other geographic boundary reports.
- Escrow procedures and authorizations; appraisal information and procedures.
- Applicable DTSC and CEQA statutes, laws, rules and procedures.

- Statistical and research methods for the collection, analysis and presentation of a variety of data.
- State school accounting laws, practices and procedures.
- California Department of Education School Facility Design processes and forms.
- Operation of a computer and assigned software.
- Correct English, grammar, spelling and punctuation.
- Reading and writing communications skills.
- Social, cultural and linguistic diversity of District, city and community.
- Preferred knowledge of geographic information system platform, ArcMap software.

ABILITY TO:

- Organize and report data with strong attention to detail and accuracy and ability to solve complex research questions.
- Interpret and evaluate research results.
- Proficient in MS Excel & google.
- Reading and writing communications skills.
- Perform professional-level accounting and auditing principles and practices.
- Establish accounting systems and procedures.
- Perform statistical and financial analysis, bookkeeping and financial record-keeping ledgers.
- Perform professional accounting activities related to the preparation, maintenance and review of financial records, accounts and reports for the District.
- Provide technical assistance to District personnel regarding accounting and budgeting policies, procedures and requirements. Maintain a variety of fiscal records, accounts and funds.
- Analyze and resolve problems and draw accurate conclusions.
- Prepare clear and accurate financial statements.
- Operate a personal computer, smart phone and recommend appropriate software needed.
- Work with consultants, community members, and school administrators.
- Make independent decisions regarding planning issues; make judgments regarding projects, yield factors and other data.
- Interpret city and county planning and zoning information and its impact on the District.
- Prepare accurate maps, plans, charts, graphs and tables.
- Understand and interpret construction documents
- Perform complex professional planning work with a minimum of supervision; meet urgent schedules and timelines.
- Communicate effectively both orally and in writing; use correct English, grammar, spelling and punctuation.
- Establish and maintain cooperative and effective working relationships with others.
- Make simple arithmetic calculations; compute square footage and acreage.
- Work confidentially and with discretion; function within appropriate line staff in professional relationships.
- Maintain consistent, punctual and regular attendance.
- Swiftly use a 10-key keyboard.

- Perform the essential functions of the job.

EDUCATION AND EXPERIENCE:

- Bachelor's degree from an accredited four-year college or university with a major in accounting, bookkeeping, finance, business administration, public administration, or a related field.
- Two (2) years' experience in accounting, budget administration, and computerized systems. Must possess a valid California Driver's License during the course of employment. Desirable to have a background in facilities planning, and development, architecture, city planning, accounting, business administration, geography, or a related field.

WORKING CONDITIONS:

Physical:

- Ability to push, pull, and transport instructional and/or presentation materials
- Ability to communicate so others will be able to clearly understand a normal conversation
- Ability to understand speech at normal levels
- Ability to bend, twist, stoop and reach
- Ability to drive a personal vehicle to conduct business
- Ability to push, pull, and transport instructional and/or presentation materials; lifting on moving objects, normally not exceeding twenty-five (25) pounds.
- Sitting for extended periods at a time
- Dexterity of hand, wrist, and fingers to operate a computer keyboard and 10 key equipment.

MENTAL ABILITY TO:

- Organize and coordinate schedules
- Analyze and interpret data
- Problem solve
- Communicate with the public and provide presentations as needed
- Read, analyze and interpret printed matter and computer screens
- Create written communication so others will be able to clearly understand the written communication
- Communicate so others will be able to clearly understand a normal conversation
- Understand speech at normal levels

Environment:

- Indoor – frequently
- Outdoor – occasionally
- Ability to work at a desk and in meetings of various configurations
- Office environment
- Numerous interruptions
- Attend meetings at construction sites