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|  | <b>PERSONNEL<br/>COMMISSION</b> | <b>JOB SPECIFICATION</b> |                                    |                 |     |
|                                                                                  |                                 | <b>Job Family:</b>       | Maintenance                        | <b>Job Code</b> | F04 |
|                                                                                  |                                 | <b>Salary Range:</b>     | <b>Salary Schedule Unit:</b>       |                 |     |
|                                                                                  |                                 | <b>FLSA Status:</b>      | Exempt<br>Unrepresented Management |                 |     |

## **CLASS TITLE: FACILITIES PLANNING AND COMPLIANCE MANAGER**

### **BASIC FUNCTION:**

Under the direction of the Director of Facilities, plans, organizes, manages, and evaluates the District's facilities compliance, deferred maintenance, preventive maintenance, energy management, and assigned capital and maintenance project programs. Establishes priorities and multi-year work plans; develops budgets, schedules, standards, and performance measures; coordinates the work of staff, consultants, contractors, utilities, and regulatory agencies.

### **DISTINGUISHING CHARACTERISTICS:**

The Facilities Planning and Compliance Manager is distinguished from the Facilities Manager classification by its primary responsibility for Districtwide facilities planning, regulatory compliance, deferred maintenance programming, energy management, and coordination and oversight of assigned facilities improvement and construction projects. In contrast, positions in the Facilities Manager classification are primarily responsible for direct supervision and operational management of employee work groups performing skilled trades, grounds maintenance, and custodial support functions. The incumbent may supervise assigned personnel and coordinate and direct the work of consultants, contractors, vendors, and other project participants within assigned areas of responsibility.

### **REPRESENTATIVE DUTIES:**

Plans, organizes, manages, and evaluates Districtwide deferred and preventive maintenance, facility compliance, energy-management, and assigned capital improvement programs; in consultation with the Director, establishes priorities, service standards, inspection cycles, schedules, and performance measures.

Develops, maintains, and updates multi-year deferred maintenance, capital improvement, and infrastructure renewal plans based on condition assessments, asset age, service histories, recurring failures, life-safety and regulatory needs, educational priorities, risk, life-cycle costs, and available funding; addresses HVAC, electrical, plumbing, water, sewer, fire/life-safety, controls, roofing, building envelope, and related site systems.

Coordinates preventive and predictive maintenance planning with facilities staff; evaluates work orders, asset inventories, inspection results, equipment reliability, backlog trends, and anticipated replacement needs to recommend program and system improvements.

Establishes project and program priorities and recommends repair, rehabilitation, replacement, modernization, or operational strategies considering reliability, maintainability, energy performance, urgency, life-cycle cost, and disruption to instructional programs.

Develops scopes of work, preliminary estimates, budgets, cash-flow projections, schedules, phasing plans, risk assessments, quality expectations, and implementation strategies; monitors milestones and recommends corrective actions for variances in scope, cost, schedule, or quality.

Prepares requests for qualifications, requests for proposals, bid and informal procurement documents, specifications, technical requirements, evaluation criteria, and related contract materials in coordination with Purchasing and District leadership.

Organizes and participates in pre-proposal and pre-bid conferences, site visits, and job walks; documents existing conditions, coordinates responses to questions through approved procurement procedures, and assists with addenda and clarifications.

Administers assigned contracts and purchase orders; reviews proposals, invoices, pay applications, submittals, change proposals, allowances, contingencies, schedules, warranties, and contractor performance for compliance with approved scope and District requirements.

Reviews architectural and engineering drawings, specifications, technical studies, cost estimates, schedules, submittals, and record documents for completeness, constructability, District standards, maintainability, operating needs, and consistency with approved project objectives.

Coordinates preparation of studies, design options, drawings, specifications, and estimates by architects, engineers, and other qualified professionals; ensures that professional services and documents requiring licensure, signature, or seal remain the responsibility of appropriately licensed professionals.

Conducts and coordinates facility condition assessments, compliance inspections, field observations, and project site visits; documents deficiencies, verifies progress, develops punch lists, participates in final job walks, and tracks corrective and warranty work through resolution.

Maintains auditable contracts, plans, specifications, permits, agency approvals, meeting minutes, change records, inspection and testing reports, commissioning records, as-built drawings, operation and maintenance manuals, warranties, and closeout files.

Monitors applicable federal, state, and local school-facility laws, codes, standards, testing and inspection requirements, permits, and District policies; coordinates filings, certifications, reports, corrective actions, and agency reviews, including Division of the State Architect processes, Title 24, accessibility, fire/life-safety, environmental, public works, and related requirements as applicable.

Coordinates assigned facility compliance programs addressing building and fire/life-safety systems, accessibility, environmental and hazardous-material conditions, indoor environmental quality, stormwater, utilities, and other regulated facilities matters; refers specialized technical determinations to qualified professionals.

Plans, manages, and evaluates assigned energy-management and conservation functions involving building automation and controls, thermal energy systems, metering, mechanical and electrical controls, and related infrastructure; coordinates energy-efficiency and decarbonization initiatives involving HVAC optimization, lighting, electrification, renewable energy, storage, electric-vehicle infrastructure, building envelope, and water conservation.

Establishes and reviews operating schedules, temperature and control standards, alarm-response procedures, trending and performance benchmarks that balance efficiency, occupant comfort, indoor environmental quality, equipment protection, and instructional needs.

Directs monitoring, diagnostics, testing, and troubleshooting of energy-management, mechanical, electrical, electronic, communication, and computerized control systems; reviews alarms, overrides, run times, and trends; coordinates programming, calibration, repairs, replacements, and verification by qualified staff or vendors.

Coordinates additions and modifications to building automation systems, including controllers, sensors, communications, wiring, graphics, sequences of operation, and programming; provides technical guidance to HVAC, electrical, maintenance, information-technology, and site personnel.

Administers assigned utility data collection, validation, billing review, and benchmarking for covered District buildings; maintains electricity, natural gas, water, building-use, and occupancy data; coordinates applicable California Energy Commission building energy benchmarking submissions and related compliance activities.

Analyzes utility bills, rates, interval consumption, demand charges, costs, greenhouse-gas emissions, building performance, and usage anomalies; resolves discrepancies, coordinates payment review, establishes baselines and forecasts, and measures or coordinates verification of conservation and operational savings.

Develops and updates assigned sustainability, energy-management, emissions-reduction, and climate-resilience plans; recommends goals, performance indicators, conservation measures, project priorities, implementation schedules, demand-response strategies, and funding opportunities based on life-cycle cost and operational needs.

Supports facilities master planning, utility and infrastructure planning, emergency preparedness, climate adaptation, program-driven facility changes, and applications for utility incentives, rebates, grants, and eligible state or local funding.

Maintains facility and asset inventories, inspection and testing records, permit and warranty data, project dashboards, planning schedules, standard specifications, cost histories, and performance measures to inform decisions and track compliance, backlog, energy performance, costs, risks, and progress.

Coordinates with District departments, school communities, utilities, consultants, contractors, inspectors, regulatory agencies, employee organizations, and other stakeholders; prepares and delivers clear reports, correspondence, recommendations, and presentations for administrators, committees, community groups, and the Board of Education.

May supervise, train, assign, and evaluate designated staff; directs and evaluates work of consultants, contractors, vendors, and multidisciplinary project participants within assigned areas of responsibility; maintains current technical knowledge through training and professional development.

Other duties as assigned that support the overall objective of the position.

## **KNOWLEDGE AND ABILITIES:**

### **KNOWLEDGE OF:**

Principles and practices of facilities planning, deferred, preventive and predictive maintenance, asset management, condition assessment, capital improvement programming, and infrastructure renewal.

Construction and project management, including project delivery, programming, design coordination, estimating, scheduling, procurement, contract administration, cost and change control, commissioning, closeout, and warranty administration.

Building construction methods, materials, and systems, including HVAC, electrical distribution, plumbing, domestic water, sewer, roofing, building envelope, fire/life-safety, building automation and controls, and site utilities.

Energy management, utility metering and billing, benchmarking, building performance analysis, energy conservation, decarbonization, greenhouse-gas reduction, sustainability, climate resilience, and measurement and verification.

Facility condition assessment, life-cycle cost analysis, prioritization, budgeting, cash-flow forecasting, scheduling, risk evaluation, and operational impact analysis.

Architectural and engineering drawings, specifications, technical studies, codes, construction terminology, and professional design and licensure responsibilities.

Public-sector purchasing and contracting methods, including RFQs, RFPs, informal and formal bids, consultant and construction agreements, and contract administration.

Applicable California public-school facility laws, agency processes, and requirements, including Division of the State Architect, California Building Code and Title 24, accessibility, fire/life-safety, environmental review, public works, occupational and construction safety, and California Energy Commission building energy benchmarking.

Energy management and building automation system operation, controls, alarms, trends, sequences of operation, troubleshooting coordination, and utility rate structures.

Budget administration, internal controls, records retention, facility and asset databases, performance reporting, and preparation of Board and management materials.

Principles and practices of supervision, including work planning, selection, training, evaluation, corrective action, and employee development.

Computer applications for word processing, spreadsheets, presentations, databases, computerized maintenance and work-order systems, plan review, project scheduling, document control, and facilities or asset management.

Effective oral and written communication, public presentations, customer service, collaborative problem solving, and conflict resolution.

#### ABILITY TO:

Plan, organize, manage, and evaluate multiple facilities, compliance, deferred maintenance, infrastructure, energy, and construction programs with competing priorities, deadlines, funding sources, and stakeholders.

Translate facility conditions, work orders, compliance obligations, utility information, and operational needs into practical priorities, scopes, procurement documents, budgets, schedules, and multi-year plans.

Read, interpret, and coordinate review of architectural and engineering drawings, specifications, contracts, technical manuals, codes, regulations, permits, and reports.

Evaluate mechanical, electrical, plumbing, controls, and other building-system needs; identify dependencies, safety and operational risks, phasing requirements, and appropriate specialized professional support.

Compile, validate, analyze, and report utility and building performance data; review billing and rate information and coordinate required benchmarking and regulatory submissions.

Develop and recommend feasible energy-efficiency, sustainability, and resilience strategies considering life-cycle cost, emissions, maintainability, available incentives, and educational operations.

Develop and review estimates, schedules, proposals, change requests, contract documents, consultant recommendations, and project alternatives; present evidence-based recommendations.

Conduct effective facility inspections, job walks, meetings, field observations, and presentations; document decisions, responsibilities, deficiencies, and follow-up actions.

Anticipate and mitigate schedule delays, budget pressures, service disruptions, compliance gaps, and project or program risks.

Coordinate and direct consultants, contractors, vendors, and multidisciplinary teams; supervise, train, and evaluate assigned employees as applicable.

Communicate technical, financial, and regulatory information clearly and professionally, orally and in writing, to technical and nontechnical audiences, including District leadership and the Board of Education.

Build cooperative working relationships with District staff, school communities, agencies, utility providers, consultants, contractors, inspectors, and the public.

Work independently, exercise sound judgment, maintain accurate and organized records, safeguard confidential or sensitive information, and respond to urgent facility needs as required.

## **EDUCATION AND EXPERIENCE:**

A bachelor's degree in facilities management, construction management, engineering, architecture, environmental studies, energy management, or a closely related field, and three (3) years of increasingly responsible experience in facilities, maintenance, construction or project management, building systems, energy management, or regulatory compliance, including at least two years in a lead, supervisory, or program-management capacity.

Additional qualifying experience may substitute for the education requirement on a year-for-year basis. Experience in a California public agency or educational environment is desirable.

## **LICENSES CERTIFICATIONS AND OTHER REQUIREMENTS:**

- A valid California driver's license and availability of private transportation, or the ability to provide transportation between District sites.
- Incumbents may be required to obtain and maintain job-related certifications or training based on assigned program responsibilities.

## **WORKING CONDITIONS:**

### **ENVIRONMENT / HAZARDS:**

- Work is performed in a variety of settings, including offices, school sites, maintenance and operational facilities, mechanical rooms, construction sites, and outdoor environments.
- Requires travel between District facilities and other locations to conduct inspections, assess facility conditions, coordinate projects, and perform assigned responsibilities.
- May involve exposure to noise, dust, fumes, chemicals, temperature extremes, uneven surfaces, moving machinery, electrical and mechanical equipment, elevated or confined spaces, and other hazards associated with maintenance, construction, and facility operations.
- Requires adherence to established safety procedures and applicable regulations when accessing or inspecting areas with potential occupational hazards.
- May require responding to urgent facility, infrastructure, or utility-related conditions outside regularly scheduled work hours.

### **PHYSICAL DEMANDS:**

- Hearing and speaking to exchange information, communicate with individuals and groups, and make presentations in person and through electronic communication systems.
- Visual acuity to read and interpret plans, specifications, reports, and digital displays; observe facility conditions; and inspect construction, maintenance, and project work.
- Manual dexterity to operate computers, communication devices, and standard office equipment.
- Sitting, standing, and walking for extended or varying periods, including traversing indoor and outdoor facilities, construction sites, and uneven surfaces.
- Bending, stooping, kneeling, reaching, and climbing stairs or ladders as necessary to access, observe, and inspect facility systems, equipment, and project areas.
- Occasionally lifting, carrying, pushing, or pulling materials, equipment, or other objects weighing up to 50lbs as is incidental to assigned responsibilities; lifting in excess of 50lbs would be with assistance.

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## **CLASSIFICATION HISTORY:**

*Original Facilities Planner classification approved by Personnel Commission: 10/15/1997*

*Revised: 09/17/2008*

*05/18/2022*

*Retitled and revised: 10/21/2026*