

# Classification and Qualification



# STANDARDS

The California State University System

## Planner/Estimator/Scheduler Series

Class Title	Class Code	Date Established	Occupation Index Reference
Senior Planner/Estimator/Scheduler	6725	6-30-82	B-1
Planner/Estimator/Scheduler	6726	6-30-82	B-1

### SERIES DEFINITION:

Under general supervision and within the Plant Operation department, Planner/Estimator/Schedulers are responsible for planning, estimating, and/or scheduling functions for preventive maintenance, repair, alteration, and minor construction projects of building and equipment installed on grounds and in or upon buildings.

### DEFINITION OF LEVELS:

Incumbents of the Senior Planner/Estimator/Scheduler class perform the *full range* of planning, estimating, and scheduling functions for a campus, or for a significant portion of a large campus. Alternatively, Senior Planner/Estimator/Schedulers serve as *the* working leader of a group of Planner/Estimator/Schedulers. Such a position involves coordinating all three functions, although others may be responsible for day-to-day estimating and/or scheduling functions.

Incumbents of the Planner/Estimator/Scheduler class perform responsible and complex planning, estimating or scheduling functions, or any combination of two such functions.

### DISTINGUISHING CHARACTERISTICS:

Classes in the Planner/Estimator/Scheduler series are distinguished from the Supervisor of Building Trades class by the staff and/or coordination aspects of assignments rather than line responsibilities for Building Trades personnel.

### Examples of Typical Activities:

Consistent with the above Definition of Levels, incumbents perform all or a combination of the following duties:

Incumbents collect and/or review information from various staff members and craft foremen; use such information in developing material lists which are complete and accurate, and cost estimates which are complete and reliable; and schedule the sequence of work required to complete a job across all Plant Operations departments, as appropriate.

Incumbents prepare cost estimates for labor and materials for in-house projects; prepare specifications and total cost estimates for preventive maintenance and similar contract jobs; 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 facility; and schedule jobs.

Incumbents typically coordinate the preparation of work orders and schedule work generated from the campus preventive maintenance system; perform tasks involved in the complete operation of the preventive maintenance system, including analyzing, planning, estimating and scheduling work to be accomplished in line with accepted trade practices, pertinent specifications, drawings and sketches; and may maintain a computerized preventive maintenance system.

Incumbents may assist in the development and review of a five-year programmed maintenance special repair budget, a deferred maintenance list, and assist in the preparation of the annual minor construction, and special repair budget.

Incumbents may prepare shop drawings and sketches with work descriptions for in-house projects and prepare contract requests for minor jobs which are non-project type requiring full engineering services.

Incumbents may lead Drafting Technicians and related positions in the preparation of plans and specifications and in the maintenance of University as-built plans and allied facility records.

Incumbents prepare specifications and plans in accordance with code, data or local requirements covering labor, scope and quality of materials.

#### **MINIMUM QUALIFICATIONS:**

##### **Knowledge and Abilities, Both Classifications:**

A general knowledge of building materials, costing procedures and the sequential methods of modern construction practices so that various crafts are brought onto the project at the proper time to assure continuous progress to bring the job to completion in a timely manner. Knowledge of the time required for performing various segments of construction and maintenance work is necessary in order to properly schedule work.

A general knowledge of the building codes and trades is also required to enable the incumbent to write complete and concise specifications to accompany plans for contract jobs. A general knowledge of State contract procedures is desired.

A general knowledge of the requirements for the proper maintenance of mechanical equipment.

A general knowledge of budgeting procedures including an understanding of price changes due to inflation and other economic factors.

A general knowledge of computerized preventive maintenance systems and ability to access such information through use of a terminal is desirable.

The ability to read, interpret, and prepare plans and specifications for all phases of construction and building maintenance.

The ability to read, understand and utilize technical information, parts lists and operating manuals is required in order to program and schedule a predetermined preventive maintenance system and to keep the various mechanical and stationary equipment properly maintained and in continuous working condition.

The ability to work effectively with all levels of University personnel as well as off-campus professional agencies.

and

**Experience:**

**Senior Planner/Estimator/Scheduler**

Three years experience in a staff or supervisory capacity in plant operations administration or the construction industry, including experience in design, plan analysis and estimating for multiple trade projects.

**Planner/Estimator/Scheduler**

Two years journey level experience in one or more building or mechanical craft trades.

and

**Education, Both Classifications:**

Equivalent to graduation from a four-year college in engineering, architecture, business management, plant management, industrial technology or public administration. Up to four years of applicable experience may be substituted for the degree requirement on a year-for-year basis.