

**Job Title:** Business Planning Coordinator

**Job Status:** Full-Time

**Department:** Business Planning

**Job Grade:** 206

**Reports To:** Director of Business Planning

**Work Setting:** On-Site

**Pay Status:** Non-Exempt

**Date Created/Updated:** 11/12/2024

**Location:** Service Center

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### Position Summary

Under general direction, the Business Planning Coordinator, performs administrative duties, project administrative duties, professional coordination support, and planning to support the departments currently under Business Planning, which include the Project Management Center of Excellence, Fleet and Facilities, and the Reliability and Resiliency departments. The primary emphasis of this position is to coordinate various assigned tasks, projects, processes, schedules, and budgets and provide exceptional customer service to internal and external entities throughout all aspects of NBU.

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### Essential Duties & Responsibilities

- Serves as a facilitator to assist in moving projects/tasks through the various processes, gain consensus on issues, and develops alternative solutions to unique issues and procedural obstacles.
- Provides support for and may supervise project related processes related to multiple departments including but not limited to Business Planning, the Project Management Center of Excellence, Asset Management and Fleet and Facilities.
- Provides support to project managers as needed to support project success.
- Coordinates the management of all departmental budgets.
- Performs accounting and bookkeeping duties; processes and prepares invoices, payment requests, receipts and deposits. Provides assistance in annual budget preparation and/or tracking of expenditures.
- Coordinates with the Purchasing department including the creation of purchase orders, development of bid documents, and execution of contract documents.
- Responds to external and internal inquiries and requests and provides information regarding projects
- Prepares and coordinates the processing of invoices, correspondence, meetings, agendas, meeting minutes, reports, presentation, mail outs, invoices and/or other types of documentation. Coordinates preparation and review of Real Estate related documents.
- May assist with special assignments/projects.
- Makes recommendations for continuous improvements.
- Attends public hearings and meetings as assigned or required.
- Manage processing of time entries in payroll system for Director's direct reports
- Manage processing of expense reports, P-Cards, and mileage and expense reimbursements for Director's direct reports
- Follow up on assignments given to direct reports and provide status reports to the Director
- Make travel arrangements for Director and direct reports to include booking accommodations for flights, hotel & transportation
- Provide special project leadership and support as needed.
- Data analysis; Proficient in Access, MS Word, Excel, Outlook. Perform filtering and sorting of data, V-lookup and other functions.
- Tactfully resolve customer or employee concerns.
- Ensure consistent and efficient interaction with others across the organization; demonstrate poise and tact under pressure and handle matters with sound judgment and confidentiality

- Demonstrate outstanding interpersonal skills and preference for collaboration with proven success working with others; ability to work with high profile individuals externally, as well as collaborate internally
- Track Department's tasks and projects to ensure appropriate prioritization of projects with respect to deadlines and organizational developments
- Evaluate Departmental policies to ensure they are in compliance with company policy, vision and mission.
- Prepare documents, requisitions, resolutions and other correspondence.
- Prepare statistical, financial, administrative and budget reports.
- Provide information to other divisions, community organizations, committees and the public involving specialized and technical subject matter
- Coordinate and organize meetings, including notifications, setup, pre and post meeting correspondence, recording minutes
- Prepare responses to routine memos, letters, or correspondence as requested
- Ability to use independent judgement to prioritize communications or projects
- Excellent communication skills to deal with a variety of customer service situations both internally and externally
- Follow up on sensitive customer complaints and inquiries ensuring management personnel respond as needed
- Track and reconcile monthly credit card statements and complete and submit expense reports in a timely manner
- Performs other duties and fulfills responsibilities as assigned or required.

#### PROJECT Coordination

- Track and monitor multiple projects' progress, and budgets
- Coordinate and update the NBU Capital Improvement Plan 5-Year Budget annually
- Create and maintain on multiple projects schedule, budget, cash flows and other project documentation
- Create and maintain status reports with actual costs, earned value, planned value, summaries and other communication
- Maintain professional and regular communications with project team
- Analyze project data and provide insight and guidance with respect to the project
- Coordinate with other departments
- Provide technical and functional direction with respect to all aspects of procurement for professional and construction related services
- Manage, process, and track contracts, contract change orders, purchase orders, requisitions, pay applications and invoices of multiple projects
- Prepare and process Board Agenda Briefing Sheets and Contract Approvals
- Maintain Board schedule for all items requiring Board approval
- Ensure all department project documents are filed and archived as required
- Attend project coordination meetings, as required, and maintain strict confidentiality as it pertains to projects, internally and externally, as appropriate.

#### General Responsibilities

- Adhere to NBU safety guidelines and practices at all times and in all situations
  - Maintain a clean and safe work area, office, field site and vehicle as applicable
  - Maintain strict confidentiality of business, employee and customer information in written and oral communications and safeguard sensitive documents
  - Maintain regular attendance; leave schedule should be managed so as to not interfere with ability to accomplish tasks, including special projects and assignments with deadlines
  - Adhere to NBU policies and procedures
  - Exemplifies NBU Core Values of Integrity, Stewardship, Team, Culture and Safety
  - Participate in and support initiatives to reach annual NBU Performance Measures
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## Formal Education and Work Experience Requirements

Degree/Diploma Obtained: High School Diploma/GED

Field of Study: Click or tap here to enter text.

Work Experience Time Frame: One Year or More

Other: Click or tap here to enter text.

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## Certification and Licensures Requirements

- Two (2) years of experience in utilities and or municipal government preferred
- Valid Class 'C' Texas Driver's License.

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## Other Minimum Qualifications

- Valid Class 'C' Texas Driver's License.

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## Knowledge of Computer Software

|                      | No Knowledge                        | Beginner                            | Intermediate                        | Expert                   |
|----------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
| ArcGIS               | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
| AutoCAD              | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
| Crystal Reports      | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> |
| Microsoft Access     | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |
| Microsoft Excel      | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Microsoft Word       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Microsoft Publisher  | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |
| Microsoft PowerPoint | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |

## Other Software Knowledge

Cityworks, Autodesk, Harris, Northstar, SmartSheet

## Experience with Machines, Tools, Equipment and Other Work Aids

Printer, Scanner, Plotter, Telephone, Flash Drive, Computers, Various internal and external network storage drives, Motor Vehicle

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## Physical Demands

**Standing:** Occasionally

Making Presentations

Observing Work Sites

Observing Work Duties

Communication with Co-Workers

**Fine Dexterity:** Occasionally

Computer Keyboard

Telephone Keypad

Calculator

Calibrating Equipment

Around Worksite

**Lifting:** Occasionally

Supplies

Equipment

Files

**Carrying:** Rarely

Supplies

Equipment

Files

**Walking:** Frequently

To Other Departments/Office/Office Equipment

**Sitting:** Frequently

Desk Work

- Meetings
- Driving

**Reaching:** Occasionally

- For Supplies
- For Files

**Handling:** Constantly

- Paperwork
- Monies

**Kneeling:** Rarely

- Filing in Lower Drawers
- Retrieving Items from Lower Shelves/Ground

**Pushing/Pulling:** Rarely

- File Drawers
- Equipment
- Table and Chairs
- Hose

**Climbing:** Rarely

- Stairs
- Ladder
- Step Stool
- Onto Equipment

**Vision:** Constantly

- Reading
- Computer Screen
- Driving
- Observing Worksite

**Foot Controls:** Occasionally

**Other:** [Click or tap here to enter text.](#)

- Driving
- Operating Heavy Equipment
- Dictaphone

**Balancing:** Rarely

- On Ladder
- On Equipment
- On Step Stool

**Bending:** Rarely

- Filing in Lower Drawers
- Retrieving Items from Lower Shelves/Ground
- Making Repairs

**Crouching:** Rarely

- Filing in Lower Drawers
- Retrieving Items from Lower Shelves/Ground

**Crawling:** Never

- Under Equipment
- Inside Attics/Pipes/Ditches

**Hearing:** Constantly

- Communication Via Telephone/Radio/To Co-Workers/Public
- Listening to Equipment

**Twisting:** Occasionally

- From Computer to Telephone
- Getting Inside Vehicle

**Talking:** Constantly

- Communication Via Telephone/Radio/To-Co-Workers/Public

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**Environmental Factors**

|   | Never                               | Seasonally                          | Several Times Per Year   | Several Times Per Month  | Several Times Per Week   | Daily                    |
|---|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Extreme Temperature (Heat, cold, extreme temp. change)    | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Wetness and/or humidity (bodily discomfort from moisture) | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

|   |                                     |                          |                          |                          |                          |                          |
|---|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Respiratory Hazards<br>(Fumes, gases,<br>chemicals, dust, and dirt)                       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Noise and Vibration<br>(sufficient to cause<br>hearing loss)                              | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Physical Hazards<br>(High voltage,<br>dangerous<br>machinery,<br>aggressive<br>Customers) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

## Health and Safety Conditions

|                          | Never<br>(Never<br>Occurs)          | Rarely<br>(Less than 1<br>hour per<br>week) | Occasionally<br>(1/3 or more<br>of the time) | Frequently<br>(From 1/3 to<br>2/3 of the<br>time) | Constantly<br>(2/3 or more<br>of the time) |
|--------------------------|-------------------------------------|---|--|---|--|
| Mechanical Hazards       | <input type="checkbox"/>            | <input checked="" type="checkbox"/>         | <input type="checkbox"/>                     | <input type="checkbox"/>                          | <input type="checkbox"/>                   |
| Chemical Hazards         | <input checked="" type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>                     | <input type="checkbox"/>                          | <input type="checkbox"/>                   |
| Electrical Hazards       | <input checked="" type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>                     | <input type="checkbox"/>                          | <input type="checkbox"/>                   |
| Fire Hazards             | <input checked="" type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>                     | <input type="checkbox"/>                          | <input type="checkbox"/>                   |
| Explosives               | <input checked="" type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>                     | <input type="checkbox"/>                          | <input type="checkbox"/>                   |
| Communicable Diseases    | <input type="checkbox"/>            | <input checked="" type="checkbox"/>         | <input type="checkbox"/>                     | <input type="checkbox"/>                          | <input type="checkbox"/>                   |
| Physical Danger or Abuse | <input checked="" type="checkbox"/> | <input type="checkbox"/>                    | <input type="checkbox"/>                     | <input type="checkbox"/>                          | <input type="checkbox"/>                   |

**Other:** Click or tap here to enter text.

**Primary Work Environment:** Office Environment

**Other:** Click or tap here to enter text.

## Overall Strength Demands

- Sedentary - Exerting up to 10 pounds occasionally or negligible weight frequently, mostly sitting
- Light - Exerting up to 20 pounds occasionally, 10 pounds frequently, walking or standing often
- Medium - Exerting 20 - 50 pounds occasionally, 10 - 25 pounds frequently, or 10 pounds constantly
- Heavy - Exerting 50 - 100 pounds occasionally, 25 - 50 pounds frequently, or 10 - 20 pounds constantly

Very Heavy - Exerting 50 pounds constantly

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### Non-Physical Demands

|   | Never                    | Rarely                              | Occasionally             | Frequently                          | Constantly               |
|---|--------------------------|-------------------------------------|--------------------------|-------------------------------------|--------------------------|
| Time Pressure                                 | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |
| Emergency Situations                          | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |
| Frequent Change of Task                       | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Irregular Schedule/Overtime                   | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |
| Performing Multiple Tasks Simultaneously      | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Working Closely with Others as Part of a Team | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Tedious or Exacting Work                      | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Noisy/Distracting Environment                 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> |

**Other:** [Click or tap here to enter text.](#)

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### Employee Statement of Understanding

THIS JOB DESCRIPTION DOES NOT CONSTITUTE AN EMPLOYEE AGREEMENT BETWEEN NEW BRAUNFELS

UTILITIES (NBU) AND THE EMPLOYEE. Nothing in this position description restricts NBU's ability to assign, reassign or eliminate duties and responsibilities of this job at any time.

I HAVE READ AND RECEIVED A COPY OF THIS JOB DESCRIPTION.

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Employee's Printed Name

\_\_\_\_\_  
Date