



CAJON VALLEY UNION SCHOOL DISTRICT PERSONNEL COMMISSION

Job Class Description

<u>PLANNING TECHNICIAN</u>			
DEPARTMENT/SITE:	District Department	SALARY SCHEDULE:	Classified Bargaining Unit
		SALARY RANGE:	34 per 2023-2024 Schedule
		WORK YEAR:	12 Months (260 Days)
REPORTS TO:	Director-Enrollment Services and Planning or assigned supervisor	FLSA:	Non-Exempt

BASIC FUNCTION:

Perform a variety of specialized duties involved in the research, collection, processing, analysis, interpretation, and reporting of data related to school facilities planning, enrollment projection, demographics, and other assigned areas; utilize a computer to input data, create queries, extract and manipulate information, generate links to data and produce a variety of computerized data, records, maps, presentations, and reports; collect and account for school facilities fees; oversee the processing of student transfers and overflow placement. The incumbents in this classification assist in supporting students by developing and maintaining accurate planning documents, maps, and data that ensure optimal school facilities and environments, which directly supports student learning.

DISTINGUISHING CHARACTERISTICS:

The **Planning Assistant** position is the first level of the two planning-related classifications in the Enrollment Services and Planning Department. The classification has primary responsibility for all District transfer processes for students applying specific knowledge to ensure compliance with pertinent laws, regulations, and policies. The **Planning Technician** is the journey-level classification, with a broader scope of technical duties in the areas of school facilities planning, demographics, enrollment projections, and related areas.

ESSENTIAL FUNCTIONS, DUTIES, AND TASKS:

The following list of functions, duties, and tasks is typical for this classification. Incumbents may not perform all the listed duties and/or may be required to perform other closely related or department-specific functions, duties, and tasks from those set forth below to address business needs and changing business practices.

Perform a variety of specialized duties involved in the research, collection, processing, analysis, interpretation, and reporting of data related to school facilities planning, enrollment projection, demographics, and other assigned areas; compile, assemble, and verify a variety of statistical data and information; ensure the integrity of data and reports.

Input, extract and update a variety of data and information in assigned computer systems; create queries, extract and manipulate information, generate links to data and produce various computerized reports, maps, and presentations for use in projects, studies, and analysis; review and ensure accuracy of input and output data; maintain and update demographic and geographic databases.

Participate in planning and conducting research and statistical analyses to develop enrollment projections used for short and long-range facilities planning; develop and implement research activities and methods

of statistical data collection, analysis, and presentation for assigned projects; analyze student enrollment to generate straight-line and growth projections over various time periods.

Collect, receive, count, verify, record, and process monies for school facilities fees; prepare, assemble, reconcile, and distribute bank deposits; reconcile and balance related accounts; process refund requests as needed; monitor and provide interpretation of legislative issues related to school fees; audit fees for accuracy.

Produce a variety of narrative and statistical reports related to enrollment projections, student demographics, facilities planning, boundaries, mapping, facilities fees, and other assigned areas; interpret findings, analyze data, and provide recommendations concerning District plans, practices, policies, legislation, legal matters, and procedures; prepare and update related documentation.

Research, review, and analyze data and information related to school capacity and room utilization, student transfers, residential housing developments, population, and historical enrollment trends, special education students, and students enrolled in special programs; calculate and revise statistical data to meet project needs and specifications.

Oversee the processing of student transfers and overflow placement; coordinate related communications between Enrollment Services and Planning, Educational Services, and Transportation; serve as liaison between the District, school sites, and parents regarding student transfers and overflow placement; participate in maintaining appropriate levels of facilities inventory and space utilization.

Provide technical assistance and support to District staff, administrators, and others concerning Facilities planning, student enrollment, student transfers, overflow placements, facilities fees, and other assigned functions; respond to inquiries, and provide technical information concerning related data, reports, maps, issues, legislation, laws, codes, rules, regulations, policies, and procedures.

Prepare and maintain various data, records, reports, maps, visual presentations, and files related to school facilities fees, agreements, housing developments, historical trends, overflow students, boundaries, demographics, boundary adjustments, current and projected student enrollment, school and District facilities and properties, capacity, population and housing trends, and assigned activities.

Prepare, print, distribute, collect, sort, file, process, and evaluate a variety of data, information, forms, and paperwork related to student registration, enrollment, student transfers, overflow placements, facilities fees, and other assigned functions; review materials for accuracy and completeness; make corrections as needed.

Review, interpret, evaluate, and provide recommendations concerning the development and implementation of guidelines, policies, and procedures related to student registration, enrollment, student transfers, overflow placements, facilities fees, and other assigned functions.

Monitor and evaluate District facility needs; identify the need for facilities construction projects in response to long-range enrollment projections; research and provide technical information and recommendations concerning boundary adjustments, school closures, and related matters.

Maintain and update Secured Agreements and Public Schools Indenture documents between the District and residential housing developers; research and collect appropriate fees from developers in accordance with agreements; advise administrators regarding the release of properties as appropriate.

Participate in a variety of surveys and related research and data analysis activities; review, analyze, arrange, and report data according to project, survey, and study specifications, needs, requests, and requirements.

Communicate with District personnel, administrators, and outside agencies to exchange information and resolve issues or concerns.

Operate modern office equipment including a computer and a variety of specialized software; drive a vehicle to conduct work.

Ensure mandated reports are completed and submitted to appropriate personnel or governmental agency in accordance with established timelines and requirements.

Prepare and distribute guides, maps, and informational materials concerning street and school boundary information for use by various District schools and departments.

Maintain and update website information for the Enrollment Services and Planning Department including staff information, school boundary maps, street and address guides, enrollment and student transfer information, and school facilities fees information and forms.

Maintain current knowledge of laws, codes, ordinances, regulations, and pending legislature related to assigned duties; provide input concerning the modification of programs, plans, projects, boundaries, and procedures to ensure compliance with local, State, and federal requirements as appropriate.

Perform classification-related duties as assigned to ensure the efficient and effective functioning of the work unit and the District, including various mandatory District trainings.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Principles, practices, procedures, and techniques involved in the research, collection, analysis, interpretation, and reporting of statistical data.

General standards, requirements, issues, practices, guidelines, policies, and procedures related to short and long-range school facilities planning, student enrollment, student transfers, overflow placements, facilities fees, school boundaries, and other assigned functions.

Terminology, practices, and procedures used in demographic and data evaluation.

Projection methods for birth, population, housing, and enrollment trends.

Data collection information systems, core spreadsheet formulas, and statistical software.

Computerized data collection, management, manipulation, and distribution requirements for analysis and reporting functions.

Principles, methods, and procedures of operating computers and peripheral equipment.

Applicable laws, codes, regulations, policies and procedures.

Data control procedures and data entry operations.

Report writing and statistical record-keeping techniques.

Correct English usage, grammar, spelling, punctuation, and vocabulary.

Interpersonal skills using tact, patience, and courtesy.

Oral and written communication skills.

Policies and objectives of assigned programs and activities.

Statistical and mathematical computations.

ABILITY TO:

Perform a variety of specialized duties involved in the research, collection, processing, analysis, interpretation and reporting of data related to school facilities planning, enrollment projection, demographics and other assigned areas.

Utilize a computer to input data, create queries, extract and manipulate information, generate links to data, and produce a variety of computerized data, records, maps, presentations, and reports.

Collect and account for school facilities fees.

Oversee the processing of student transfers and overflow placement.

Analyze student enrollment to generate straight-line and growth projections over various time periods.

Review, interpret, evaluate, and provide recommendations concerning the development and implementation of guidelines, policies, and procedures.

Assemble, organize, and prepare data for records and reports.

Verify and ensure integrity and accuracy of data and reports.

Type or input data at an acceptable rate of speed.

Interpret findings, analyze data, and provide related recommendations.

Prepare a variety of narrative and statistical lists, records, and reports.

Analyze situations accurately and adopt an effective course of action.

Establish and maintain cooperative and effective working relationships with others.

Interpret, apply, and explain applicable laws, codes, rules, regulations, policies and procedures.

Work independently with little direction.

Communicate effectively both orally and in writing.

Meet schedules and timelines.

Plan and organize work.

Perform accurate mathematical and statistical calculations.

Produce a variety of narrative and statistical reports related to enrollment projections, student demographics, facilities planning, boundaries, mapping, facilities fees, and other assigned areas.

EDUCATION AND EXPERIENCE:

Any combination equivalent to graduation from high school supplemented by college-level course work in mathematics, statistics, research, or related field and four years of increasingly responsible experience involving, data analysis and data reporting including knowledge of statistical research methodologies, work with computer databases, software applications, enrollment projections, and student demographics.

LICENSES AND OTHER REQUIREMENTS:

Must possess a valid California driver's license and maintain qualification for automobile insurance coverage.

Driving a vehicle to conduct work.

WORKING CONDITIONS:

ENVIRONMENT:

Office environment.

Frequent interruptions.

PHYSICAL DEMANDS:

Dexterity of hands and fingers to operate a computer keyboard and other office equipment.

Seeing to read and prepare a variety of materials, view a computer monitor for extended periods of time, and perform assigned activities.

Hearing and speaking to exchange information in person and on the telephone.

Sitting and/or standing for extended periods of time.

Reaching overhead, above the shoulders, and horizontally to retrieve and store files and supplies.
Bending at the waist, kneeling, or crouching to file, shelve, and/or retrieve materials.
Occasionally lift and/or move up to 25 pounds.

HAZARDS:

Traffic hazards.

CLEARANCES:

Criminal Justice Fingerprint / Background
Tuberculosis
Pre-placement Physical and Drug Screen

JOB CLASS HISTORY

Approved 7/92; Rev 3/97; Reallocated 1/02; 10/10 (Ewing)
Revised: 11/24 (EH&A / MGT Consulting) / GB 11/12/24; PC 10/24/24
Classified Employee's Salary Schedule: Range 34