



CAJON VALLEY UNION SCHOOL DISTRICT PERSONNEL COMMISSION

Job Class Description

<u>PLANNING ASSISTANT</u>			
DEPARTMENT/SITE:	District Department	SALARY SCHEDULE:	Classified Bargaining Unit
		SALARY RANGE:	27 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:

Performs varied and responsible department duties related to planning, student transfers, overflow placements, enrollment, and school facility impact fees; resolves parent concerns involving student transfers; coordinates transfer information with various departments; assists in marketing activities of the District to retain and recruit students. The incumbents in this classification assist in supporting students by providing administrative and logistical support for educational programs and activities, which directly supports student learning.

DISTINGUISHING CHARACTERISTICS:

The **Planning Technician - Bilingual** 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; perform oral and written translation from English into a designated second language. The **Planning Assistant** position is the first level of the two planning-related classifications in the Long-Range Planning Department. The classification has primary responsibility for the inter-district transfer process for students and assists with intra-district transfers, 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.

Process student transfers and overflow placement; coordinate related communications between Enrollment Services and Long-Range Planning Departments, Pupil Services, Transportation, Family Community and Engagement, Homeless/Foster Liaison, and other departments as needed; serve as liaison between the District school sites and parents and provide technical information and interpretation regarding student transfers, transfer revocations, and overflow placement.

Calculate, collect, process, and record school facility fees; process agency clearance certificates and monies; prepare, assemble, and reconcile bank deposits and balance-related accounts; process refund requests, as needed; monitor and provide interpretation of legislative issues related to school facility fees.

Receive visitors, including administrators, staff, and the public, and provide information or direct to

appropriate personnel; exercise independent judgment in resolving a variety of issues and refer difficult issues to the administrator as necessary; provide technical information and assistance related to office or program operations, policies, and procedures.

Provide technical assistance in the data gathering, statistical analyses, and displays of data, input, extract, and update a variety of data into an assigned computer system; initiate queries and generate a variety of computerized reports as requested or required; establish and maintain automated records and files; ensure the accuracy of input and output data.

Communicate with parents, including those with grievances and who are considering a transfer request, to evaluate their needs and offer guidance in determining enrollment options; work and communicate with District personnel, administrators, and various outside agencies to exchange information and network to determine an appropriate resolution to issues or concerns.

Assist in planning and conducting research; compile and verify a variety of information; compute statistical information for a variety of reports and assist in developing enrollment projections; develop methods of data collection and analysis for assigned projects; process and evaluate a variety of forms and applications related to assigned functions; duplicate and distribute materials as needed.

Prepare, print, distribute, collect, sort, file, process, evaluate, and maintain a variety of data, forms, records, and reports related to student registration, enrollment, student transfers, overflow placements, facilities fees, and other assigned duties; ensure accuracy and completeness of data, records, and reports.

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

Assist in a variety of surveys and related research and data analysis activities; review, analyze, arrange, and report data as required.

Participate in team meetings and contribute to the continuous improvement of enrollment procedures and services; schedule and attend a variety of meetings; take meeting notes.

Operate modern office equipment including a computer and assigned software.

Assist and guide families and their students through the enrollment process, providing information about enrollment requirements and procedures; and answering any questions related to the enrollment process. Assist with the development, preparation, and distribution of enrollment materials and informational packets.

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:**

Current office practices, procedures, and equipment.

Telephone techniques and etiquette.

Policies and objectives of assigned program and activities.

Applicable laws, codes, regulations, policies, and procedures.

Record-keeping techniques.

Correct English usage, grammar, spelling, punctuation, and vocabulary.
Interpersonal skills using tact, patience, and courtesy.
Oral and written communication skills.
Operation of a computer and assigned software.
Methods of collecting and organizing data and information.
Business letter and report writing, editing, and proofreading.
Basic arithmetic and statistics.

ABILITY TO:

Interpret, apply, and explain laws, codes, rules, and regulations related to assigned activities.
Analyze situations accurately and adopt an effective course of action.
Work independently with little direction.
Type or input data accurately and at an acceptable rate of speed.
Understand and effectively resolve issues, complaints, or problems.
Maintain confidentiality of sensitive and privileged information.
Determine appropriate action within general guidelines.
Exhibit empathy with parents when addressing their concerns.
Establish and maintain cooperative and effective working relationships with others.
Maintain records and files.
Compile and verify data and prepare reports.
Operate a variety of office equipment including a computer and assigned software.
Complete work with many interruptions.
Plan and organize work.
Meet schedules and timelines.
Perform mathematical calculations with speed and accuracy.

EDUCATION AND EXPERIENCE:

Any combination equivalent to graduation from high school or equivalent supplemented by college-level coursework and two years of increasingly responsible related experience in a large organization involving frequent public contact.

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.
Regularly lift and/or move up to 25 pounds.

CLEARANCES:

Criminal Justice Fingerprint / Background

Tuberculosis

Pre-placement Physical and Drug Screen

JOB CLASS HISTORY

Approved GB PC (New) Eric Hall & Associates

Revised: 11/24 (EH&A / MGT Consulting) / GB 11/12/24; PC 10/24/24

Classified Employees' Salary Schedule: Range 27