

**CAJON VALLEY UNION SCHOOL DISTRICT  
PERSONNEL COMMISSION**

**CLASS TITLE: PLANNING ASSISTANT**

**BASIC FUNCTION:**

Under the direction of the Director-Long Range Planning, perform varied and responsible planning department duties related to student transfers, overflow placements, and school facility impact fees; resolve parent concerns involving student transfers; coordinate transfer information with various departments; assist in marketing activities of the District to retain and recruit students.

**DISTINGUISHING CHARACTERISTICS:**

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.

**REPRESENTATIVE DUTIES:**

**ESSENTIAL DUTIES:**

Process student transfers and overflow placement; coordinate related communications between Long-Range Planning, Pupil Services, Transportation and other departments as needed; serve as liaison between the District school sites and parents and provide technical information and interpretation regarding student transfers 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 and issue refunds, 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; assure 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; assure 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.

Schedule and attend a variety of meetings; take meeting notes.

Operate a variety of office equipment including a calculator, copier, fax machine, multi-line telephone system, scanner, computer and assigned software.

Receive, sort, and distribute mail; open mail and compose responses independently as appropriate.

Monitor inventory levels of office supplies; order, receive and maintaining inventory of office supplies.

**OTHER DUTIES:**

Perform related duties as assigned.

**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.  
Make arithmetical 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 increasingly responsible related experience in a large organization involving frequent public contact.

**WORKING CONDITIONS:**

**ENVIRONMENT:**

Office environment.  
Constant interruptions.

**PHYSICAL DEMANDS:**

Dexterity of hands and fingers to operate a computer keyboard and other office equipment.  
Hearing and speaking to exchange information in person and on the telephone.  
Sitting or standing for extended periods of time.  
Seeing to read, prepare and assure accuracy of a variety of documents and view a computer screen for extended periods of time.  
Bending at the waist, kneeling or crouching to file and retrieve materials.  
Reaching overhead, above the shoulders and horizontally to retrieve and store files and supplies.  
Regularly lift and/or move up to 25 pounds and occasionally lift and/or move up to 50 pounds.

**CLEARANCES:**

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