

## Knowledge of Skills and Abilities Required by Professional Level Planning Series Roles and Responsibilities and KSA Matrix

### **Summary and Typical Roles and Responsibilities of Planners in the City of Carlsbad**

The Planner classification is structured into four levels ranging from Junior, Assistant, Associate and Senior Planners. While similar planning duties may be performed at more than one level, they are distinguished from one another according to the level of competency, scope and complexity of assignments, independent discretion and judgment required.

**Junior (Entry level):** Incumbents work on projects with limited scope or under direct supervision. This is a learning level where incumbents are exposed to many of the duties but are given limited independent discretion in matters related to work procedures and methods.

**Assistant (Intermediate level):** Incumbents work on routine to moderate difficulty assignments. Work is supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise.

**Associate (Journey level):** Incumbents work on moderate to complex assignments requiring independent exercise of judgment and discretion and initiative in performing responsibilities. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

**Senior (Advanced/Lead level):** Incumbents work on the most complex, difficult or sensitive assignments requiring a broad and in depth use of knowledge, skills and abilities. Positions at this level may supervise the work of other staff on project assignments and lead teams or represent the city on matters outside the agency.

Typically, a Planner must possess and demonstrate at least 80% of the Knowledge, Skills and Abilities at a given level to be assigned to that level. The following are examples of the types of job duties that may be found in the Planner roles:

Manage general, community and urban plans; manage land use and land development projects; review and write environmental documents; prepare and coordinate processing of local, state and federal permits; review and analyze technical drawings, specifications and reports; perform site inspections and field research; research, review and prepare ordinances and policies; review projects and advise citizens and developers during application process to ensure compliance with City regulations; prepare planning reports, use GIS products/maps; perform quality control, coordinate various departments and agencies, monitor mitigation requirements for environmentally sensitive projects and perform proper documentation and reporting and perform related tasks.

Responds to inquiries/requests; assists customers with planning issues, and intakes permits, conducts sites visits for proposed development sites; organize and participate in conducting and organizing public workshops and hearings. Serves on cross-functional teams. Presents staff reports to Planning Commission and City Council.

Performs informational and advisory reporting; researches and creates draft resolutions, ordinances, and General Plan amendments for review; prepares legal notices and notices of decision; conducts surveys and studies to address significant development issues; reviews and processes private and public development projects and updating land management files. Attend public hearings for assigned projects; prepare Planning Commission and City Council staff reports, conduct final inspections on projects, process of private and public development projects and review grading improvement plans.

Performs other related duties as assigned.

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A Planner typically must possess and demonstrate at least 80% of the Knowledge, Skills and Abilities at a given level to be assigned to that level.

<b>Job Level: Entry (Junior Planner)</b>	<b>Intermediate (Assistant)</b>	<b>Journey Level (Associate)</b>	<b>Sr Journey Level (Senior Planner)</b>
<b><i>Complexity and Scope</i></b>	<b><i>Complexity and Scope</i></b>	<b><i>Complexity and Scope</i></b>	<b><i>Complexity and Scope</i></b>
<p>Entry level professional. This is the first of four professional job levels in the Planner Job Family.</p> <p>Requires limited use and application of basic principles, theories, concepts used, and a basic understanding of the City's policies and procedures.</p> <p>Provides solutions to routine problems of limited scope and complexity.</p> <p>Perform planning and environmental research and analysis; prepare community, general and land use plans and related studies; perform site inspections and field research, perform development permit review and plan checks; assist in the administration of landscape, rezoning and subdivision ordinances; prepare preliminary reports and recommendations and perform related tasks.</p>	<p>Intermediate entry level. This is the second of four professional job levels in the Planner Job Family.</p> <p>Requires limited to moderate use and application of standard principles, theories, concepts used and a basic understanding of the City's policies and procedures.</p> <p>Provides solutions to routine problems of moderate scope and complexity.</p> <p>Manage general, community and urban plans; manage land use and land development projects; review and write environmental documents; prepare and coordinate processing of local, state and federal permits; review and analyze technical drawings, specifications and reports; perform site inspections and field research; research, review and prepare ordinances and policies; review projects and advise citizens and developers during application process to ensure compliance with City regulations; prepare planning reports, use GIS products/maps and perform related tasks.</p>	<p>Experienced professional. This is the third of four professional job levels in the Planner Job Family.</p> <p>Requires full use and application of standard principles, theories, concepts used and a basic understanding of the City's policies and procedures.</p> <p>Provides solutions to a wide variety of problems of moderate scope and complexity.</p> <p>Handle complex projects, perform site inspections and field research, review and enforce plans and specifications, perform quality control, coordinate various departments and agencies, monitor mitigation requirements for environmentally sensitive projects and perform proper documentation and reporting and perform related tasks.</p>	<p>Fully qualified professional. This is the fourth of the four professional job levels in the Planner Job Family.</p> <p>Requires both the breadth and depth of use and application of standard principles, theories, concepts used and a basic understanding of the City's policies and procedures.</p> <p>Provides solutions to a wide range of difficult problems in a thorough, imaginative, and practical manner.</p> <p>Typical assignments require advanced technical skill, political acumen, wider community outreach activities and exposure to more sensitive issues.</p>

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<p><b><u>Discretion and Impact:</u></b></p> <p>Exercises judgment within closely defined procedures and practices to determine appropriate action.</p> <p>Errors typically have a limited effect on the organization.</p>	<p><b><u>Discretion and Impact:</u></b></p> <p>Exercises judgment within closely defined procedures and practices to determine appropriate action.</p> <p>Errors typically have a limited effect on the organization.</p>	<p><b><u>Discretion and Impact:</u></b></p> <p>Exercises judgment within standard, defined procedures and practices to determine appropriate action.</p> <p>Incorrect decisions or recommendations or failure to get results may cause delays in schedules and result in the allocation of more resources.</p> <p>May attend regional committees for information and assist in communicating agency input on regional issues.</p>	<p><b><u>Discretion and Impact:</u></b></p> <p>Independently exercises judgment within generally defined practices and policies, selecting methods and techniques for obtaining solutions.</p> <p>Incorrect decisions or recommendations, or failure to achieve objectives would normally have a serious effect upon the organization's results and customer/citizen relationships.</p> <p>May serve on regional committees and impact regional standards, regulations, or policies.</p>
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<b><u>Contact and Communication</u></b>	<b><u>Contact and Communication</u></b>	<b><u>Contact and Communication</u></b>	<b><u>Contact and Communication</u></b>
<p><i>*This factor considers incumbent's demonstrated ability to communicate effectively complex technical information to a broad audience, from development professionals, to elected and appointed officials, and to the general public</i></p> <p>Responds to inquiries/requests from the above broad audience under the guidance of close supervision; assists customers with planning issues, and intakes permits, conducts sites visits for proposed development sites. Has direct customer/citizen contact. May occasionally present staff reports to Planning Commission and City Council on routine projects.</p> <p>Effective communicator, with both written and oral presentation</p> <p>Good interpersonal and communication skills. Effective team player.</p>	<p><i>This factor considers incumbent's ability to communicate in writing a variety of technical and non-technical information in a concise, organized and persuasive manner. Such written communications may take the form of staff reports, draft findings and resolutions, internal memoranda and external correspondence.</i></p> <p>Conducts sites visits for proposed development sites; assists applicants/public on items of routine to medium complexity; may help organize and participate in conducting and organizing public workshops and hearings. Has direct customer contact within a routine or moderate complexity environment. Present staff reports of routine or moderate complexity to Planning Commission and City Council.</p> <p>Effective communicator, with both written and oral presentation</p> <p>Good interpersonal and communication skills. Effective team player.</p>	<p><i>This factor evaluates the degree to which incumbent can communicate verbally to co-workers and managers, customers and citizens, elected and appointed officials. Demonstrated public presentation skills are also considered in assessing competency.</i></p> <p>Has direct customer/citizen contact. Conducts sites visits for proposed development sites. Frequent interorganizational contact. Serves on cross-functional teams. Presents staff reports to Planning Commission and City Council.</p> <p>Effective communicator, with both written and oral presentation. Developing excellent presentation, demonstration, and writing skills.</p> <p>Strong interpersonal and communications skills. Effective team player and leader of small, departmental or interdepartmental teams.</p>	<p><i>This factor also considers the incumbent's demonstrated skill level in handling difficult and controversial situations with citizens.</i></p> <p>Negotiates and mediates with applicants, developers, citizens, elected and appointed officials, project consultants, external agencies, and the general public on land use issues; regularly presents staff reports to the Planning Commission and City Council; organizes and participates in workshops; and explains medium to complex issues to applicants/public. Direct customer/citizen contact to understand issues and plan and implement solutions. Frequent cross-functional contact and coordination.</p> <p>Skilled and effective communicator, with both written and oral presentations. Highly developed presentation, demonstration and writing skills.</p> <p>Strong interpersonal and communication skills. Effective team player. Provide the lead for the technical work of other planners.</p> <p>May represent the City in the community</p>

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<p><b><u>Supervision Given or Received</u></b></p> <p>Works under direct supervision, performs independently within established structure or pattern of guidelines established by their supervisor or by the project. Exceptions or changes in procedures are explained in detail as they arise.</p> <p>Supervisor initiates meetings to ensure appropriate coaching during new assignments.</p> <p>May work on project teams</p> <p>May report to Sr/Principal Planner.</p>	<p><b><u>Supervision Given or Received</u></b></p> <p>Works under functional direction, performs independently within guidelines established by their supervisor or by the project. Exceptions or changes in procedures are explained in detail as they arise.</p> <p>Supervisor may initiate meetings to ensure appropriate coaching during new assignments. Work is supervised while in progress and fits an established structure or pattern.</p> <p>May work on project teams</p> <p>May report to Sr/Principal Planner.</p>	<p><b><u>Supervision Given or Received</u></b></p> <p>Works under functional direction, performs independently within guidelines established by their supervisor or by the project.</p> <p>Supervisor typically determines goals/objectives. Work is reviewed for soundness of judgment and overall adequacy and effectiveness. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.</p> <p>Effective project team member.</p> <p>May report to Sr/Principal Planner.</p>	<p>and at professional meetings.</p> <p><b><u>Supervision Given or Received</u></b></p> <p>Works under general direction. Participates in determining objectives of assignment. Work is reviewed upon completion for adequacy in meeting objectives.</p> <p>May provide technical guidance and supervision to subordinate staff in course of performing responsibilities.</p> <p>Leads project teams. Understands and effectively applies project management fundamentals.</p> <p>Reports to Principal Planner; May provide work direction and train subordinate planning staff as assigned.</p>
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<p><b><u>Technical, Organization and Industry Knowledge:</u></b></p> <p>Requires learning:</p> <p>Municipal planning principles, procedures and methods including principles of urban design, site planning and architectural design, applicable federal, state, and local planning laws, ordinances, and policies.</p> <p>Professional assignments are of a routine level of complexity involving informational and advisory reporting; researching and creating draft resolutions, ordinances, and General Plan amendments for review; preparing legal notices and notices of decision; conducting surveys and studies to address significant development issues; reviewing and processing of private and public development projects and updating land management files. Attend public hearings for assigned projects, prepare Planning Commission and City Council staff reports, conduct final inspections on projects and review grading improvement plans.</p>	<p><b><u>Technical, Organization and Industry Knowledge:</u></b></p> <p>Requires a basic understanding of :</p> <p>Municipal planning principles, procedures and methods including principles of urban design, site planning and architectural design, applicable federal, state, and local planning laws, ordinances, and policies.</p> <p>Professional assignments are at a routine to moderate level of complexity involving informational and advisory reporting; researching and creating draft resolutions, ordinances, and General Plan amendments for review; preparing legal notices and notices of decision; conducting surveys and studies to address significant development issues; reviewing and processing of private and public development projects and updating land management files. Attend public hearings for assigned projects, prepare Planning Commission and City Council staff reports, conduct final inspections on projects and review grading improvement plans.</p>	<p><b><u>Technical, Organization and Industry Knowledge:</u></b></p> <p>Requires a thorough understanding of:</p> <p>Municipal planning principles, procedures and methods including principles of urban design, site planning and architectural design, applicable federal, state, and local planning laws, ordinances, and policies.</p> <p>Assignments are at a moderate to complex level which occasionally require the application of unusual procedures or methods to bring successful conclusion to problematic projects; attend public hearings for assigned projects, prepare Planning Commission and City Council staff reports, conduct final inspections on projects, process private and public development projects and review grading improvement plans.</p>	<p><b><u>Technical, Organization and Industry Knowledge:</u></b></p> <p>Requires an advanced understanding of:</p> <p>Municipal planning principles, procedures and methods including principles of urban design, site planning and architectural design, applicable federal, state, and local planning laws, ordinances, and policies.</p> <p>Managing assigned planning projects of greater complexity and community significance or sensitivity; and ability to address and evaluate medium to complex issues/projects. Attend public hearings for assigned projects, prepare Planning Commission and City Council staff reports, conduct final inspections on projects, process private and public development projects and review grading improvement plans.</p>
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<p><b><u>Typical Minimum Education and Experience:</u></b></p> <p>The equivalent of a Bachelor's degree from a accredited college or university with major work in planning or a related field, with no significant related work experience.</p> <p>A Masters' degree in planning, public administration or a related field is desirable.</p>	<p><b><u>Typical Minimum Education and Experience:</u></b></p> <p>The equivalent of a Bachelor's degree from an accredited college or university with major work in planning or a related field, plus a minimum of one year of related work experience.</p> <p>A Masters' degree in planning, public administration or a related field is desirable.</p>	<p><b><u>Typical Minimum Education and Experience:</u></b></p> <p>The equivalent of a Bachelor's degree from an accredited college or university with major work in planning or a related field, plus a minimum of three years of related work experience.</p> <p>A Masters' degree in planning, public administration or a related field is desirable.</p>	<p><b><u>Typical Minimum Education and Experience:</u></b></p> <p>The equivalent of a Bachelor's degree from an accredited college or university with major work in planning or a related field, plus 5-7 years of related work experience.</p> <p>A Masters' degree in planning, public administration or a related field is desirable.</p>
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