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	<u>PLANNER SERIES</u>	

Series Definition:

Positions in this series are concerned with providing legislative and top-level administrative policymakers with information and plans for the orderly and coordinated physical, environmental, social and/or economic development of Hawaii and/or of the services of the State government. Positions are involved with the development of information and rationale for decisions which affect the direction, rate and character of growth of the State and/or of services to the people of the State over a significant period of time.

Positions in this series are characterized by the following:
(1) they formulate plans, which are statements of goals and objectives, recommended alternatives for actions, and recommended policies and programs within a significant time period; and
(2) the plans they formulate are for a broad area of concern having a direct impact on and/or are directly affected by more than one functional concern or activity of the State government. Consequently, it is required of Planners that they integrate and reconcile an extensive variety of physical, social, economic and environmental factors.

The process by which plans are developed involves: (1) the collection, analysis and evaluation of an extensive variety of physical, social, economic and environmental data, identification and clarification of public opinion, general State goals, objectives and policies, and the determination of problems, to obtain a comprehensive perspective of conditions and concerns for which the plans are being prepared; (2) integration and reconciliation of such factors including the consideration of the relationships among resources, functions and services; identification and resolution where possible, of conflicting goals, objectives and policies, applicable laws, rules, regulations and practices; (3) formulation of public plans for the area(s) of concern consisting of alternatives for action over a significant period of time, and supportive documentation for the use of legislative and administrative decision makers. Supportive documentation includes statements of consequence of alternative action or no action, risks and uncertainties involved, recommendations as to the alternative time sequences of programs and relative priorities for the effectuation of public plans.

Planners are also concerned with maintaining, reviewing, updating and revising public plans as State and public goals, objectives, policies, priorities, conditions and other factors change, and advising and assisting State operating agencies, county jurisdictions and others in applying planning concepts and methods and in providing technical assistance in the programming and evaluation of plans.

Agencies for which Planners are located are those with responsibility for effectuating, coordinating and/or overseeing statewide activities and/or concerns impinging on or affected by activities and concerns of other agencies. Examples of programs with this scope of concern are, State comprehensive planning; and major functional planning such as transportation systems development; agricultural and/or industrial development; urban planning; housing; urban redevelopment; health facilities and services; land use and environmental planning; natural resources management; parks and recreation; and coastal zone management.

Excluded from this series are positions which involve professional work identified with other occupations by the nature of the paramount qualification requirements and/or in which the primary emphasis of the work is in a specific occupational area such as engineering, architecture, economics, sociology, social work, budget evaluation and analysis, management and organizational analysis, etc., or in which the primary responsibility of the position is in program evaluation and development requiring knowledge of the specific operations, procedures, methods, standards and techniques used in the program to which assigned.

This is an amendment to the class specification for the
PLANNER SERIES approved on September 3, 1982.

DATE APPROVED: 5/1/85

/s/ James H. Takushi
JAMES H. TAKUSHI
Director of Personnel Services

PLANNER I

2.843

Duties Summary:

Serves in a trainee capacity; participates in formal training course work and on-the-job assignments to develop understanding of

principles, concepts, techniques, procedures, work processes and use of reference materials fundamental to public planning; and performs other related duties as assigned.

Distinguishing Characteristics:

This class includes the performance of specific and limited reference and research assignments under immediate supervision. Assignments are performed in accordance with detailed instructions and subject to close review as part of a program of planned training.

Examples of Duties:

Participates in orientation and training programs and activities in the functions of public planning and pertinent research methods and techniques; performs assigned reading and prepares reports on such readings; carries out the library search of writings on particular subjects and prepares bibliographies; extracts and compiles or verifies designated information in journals, reports and other materials; tabulates data involving the use of statistical concepts and formulae; may operate adding and calculating machines and performs simple drafting; may maintain specialized files and records such as map files.

Knowledge and Abilities Required:

Knowledge of: General research sources; report writing; statistical methods.

Ability to: Understand and apply basic statistical concepts and methods; learn the planning process and principles of public planning; learn research methods and techniques used in public planning; read and comprehend a broad range of subjects; learn the functions of public planning; speak and write effectively.

PLANNER II

2.844

Duties Summary:

Performs fact-finding and analysis in public planning studies; and performs other related duties as assigned.

Distinguishing Characteristics:

This class involves the compilation of facts and simple analysis work in assisting in planning studies. These studies are

concerned with integrating the existing conditions of an area of concern or program with new or changing patterns such as of land uses, facilities, and environmental, social and/or economic conditions. Work results are subject to close review.

Examples of Duties:

Participates in training activities involving planning studies; performs assigned reading and prepares reports on such readings; gathers and compiles data needed for planning activities, including participation in field studies; prepares graphs, charts, maps and other pictorial presentations; prepares drafts of findings and conclusions; operates adding and calculating machines; may perform simple drafting.

Knowledge and Abilities Required:

Knowledge of: General research sources; report writing; basic research and statistical methods and techniques used in public planning.

Ability to: Understand and apply basic statistical concepts and methods; learn the planning process and principles of public planning; understand and apply research methods and techniques used in public planning; read and comprehend a broad range of subjects; understand functions and objectives of public planning; learn various planning methods and techniques; speak and write effectively; collect, compile, correlate and analyze facts and draw sound conclusions therefrom; learn the sources of socio-economic information and of governmental organization programs and functions.

PLANNER III

2.845

Duties Summary:

Assists in the conduct of public planning projects; conducts fact-finding and analyses; prepares reports of findings and conclusions and planning recommendations; and performs other related duties as assigned.

Distinguishing Characteristics:

This class involves responsibility for assisting higher-level planners by performing required research and analysis of data and participating in the development of plans for selected planning problems and assignments. The work involves independently

carrying out required research studies and preparing reports of findings and analysis of data and developing preliminary drafts for assigned planning project segments. Results and recommendations are integrated into the larger project by the planner in-charge or other supervisor.

Assignments typically are portions or segments of larger studies or projects assigned to higher-level planners, and generally involve relatively homogeneous planning problems consisting of a limited range of factors and variables. Precedents and guides such as in the form of similar work done by the agency or by others are usually available.

Within the defined limits of assignments, positions in this class independently perform required research studies. Where results or recommendations will have significant impact on the total planning project, technical review of completed work is made. Review of planning recommendations includes a determination of whether the incumbent has applied a sound understanding of planning methods and techniques.

Examples of Duties:

Selects reference sources, and determines proper approaches and methods to obtain necessary data; gathers and compiles data needed for planning activities; analyzes data involving the use of statistical concepts and formulae and which may include the use of electronic data processing equipment; drafts reports of findings and recommendations; develops data for and prepares maps, charts and other presentations; reviews legislation and administrative references in relation to the development of planning goals and programs; may supervise other personnel in fact-finding activities as assigned.

Knowledge and Abilities Required:

Knowledge of: General research sources and sources of socio-economic information; report writing; research and statistical methods and techniques used in public planning; governmental organization, programs and functions.

Ability to: Understand and apply research and statistical concepts and methods; read and comprehend a broad range of subjects; assist in planning studies and projects; speak and write effectively; collect, compile, correlate and analyze facts, and draw sound conclusions therefrom; learn and apply primary public planning methods and techniques, and the functions of public planning.

PLANNER IV

2.846

Duties Summary:

Conducts planning projects; participates in promoting effective relationships with other agencies and groups; and performs other related duties as assigned.

Distinguishing Characteristics:

The class reflects the independent performance of planning work for assignments of moderate difficulty and scope. Assignments are limited in scope and the variety of considerations to be made generally involve established planning procedures and/or situations in which substantial difficulties are not normally evidenced in identifying and defining goals and objectives, such as projects for the review and revision of existing plans or the development of plans for a specific feature of the development of a large geographic area or public facility, activity or concern. Assignments are typically on a project basis and may represent portions of larger planning projects. Positions are expected to develop work outlines within the parameters determined by the supervisor, conduct necessary research, data collection and analysis, and develop complete planning recommendations for the assigned project. Positions are required to apply judgment and knowledge in relating the assignment or project to the objectives of more comprehensive plans or to a larger project, and to integrate the results.

Positions participate in the development of effective working relationships with other agencies and jurisdictions for the purpose of providing information on planning objectives, findings, methods and related matters.

Certain positions may be assigned responsibility for the supervision of lower-level planners and others, primarily in performing fact-finding activities and research.

Supervisors outline the scope and objectives of the assignment or project and within this established framework, positions are expected to complete the entire project. Guidance is available where unusual difficulties or complex planning problems arise. Review of completed work is for completeness and the soundness of conclusions and planning recommendations.

Examples of Duties:

Conducts fact-finding and analysis; reviews legislation and administrative references as necessary in relation to the development of planning goals; correlates findings and develops plans for particular public activities and/or facilities throughout an assigned geographic area, region, activity or concern; participates in the compilation of final summary reports of comprehensive planning projects including the preparation of assigned segments; participates in the maintenance of liaison with other agencies and jurisdictions for providing information on planning objectives, findings, methods and related matters; participates in obtaining cooperation and assistance through public contacts, informational and other activities; may supervise other personnel in fact-finding and analysis activities as assigned.

Knowledge and Abilities Required:

Knowledge of: General research sources and sources of socio-economic information; research and statistical methods and techniques used in public planning; report writing; governmental organization, programs and functions; purposes, principles, practices, methods and techniques of public planning; the planning process.

Ability to: Conduct public planning studies and projects; understand and apply statistical concepts and methods and techniques used in public planning; read and comprehend a broad range of subjects; collect, correlate, evaluate and analyze facts and develop sound conclusions therefrom; speak and write effectively; maintain effective working relationships with others.

PLANNER V

2.847

Duties Summary:

Conducts studies and prepares plans for the development of a geographic area, a major area of concern, public facility or activity; establishes and promotes effective relationships with other agencies and jurisdictions; and performs other related duties as assigned.

Distinguishing Characteristics:

This class involves the full range of professional planning work required in the conduct of major planning projects. Work

involves conducting fact-finding and analysis, coordinating input from individuals, groups or agencies involved in or affected by the planning process and consideration of a variety of social, economic, physical and environmental factors in the development of plans. Assignments are characterized by the scope, depth and variety of planning considerations required, such as planning for physical, social or economic development of a large geographic area or areas; planning for a major land use; or for a major kind of public facility; or for a major statewide activity. Assignments frequently involve difficulty in the determination of appropriate planning goals, and objectives because of conflicting interests or the generality of expression of policy. Originality and creativity is required in the development of planning alternatives and recommendations, and in resolving and reconciling conflicting information.

The scope and/or potential impact of plans developed and the number of agencies or groups affected by the assigned project typically require liaison and coordination with personnel of other agencies and/or jurisdictions. Positions are also responsible for stimulating the interest and support of groups and individuals for concepts and plans. Work may include and/or require advising and assisting on planning done by local jurisdictions pertinent to the assigned project. Certain positions may supervise lower-level professional planners and other personnel who assist in the conduct of assigned portions of the project and/or in fact-finding and analysis and related activities.

Supervision received is general in nature. Final reports are reviewed for applicability to administrative decisions and not normally for technical soundness or completeness.

Examples of Duties:

Conducts fact-finding and analysis of complex planning problems, issues and policies; coordinates input from individuals and organizations involved in or affected by the planning process; correlates findings and develops plans affecting particular private or public activities and/or facilities throughout an assigned area of concern; compiles final summary reports and makes oral presentations before interested groups as necessary; maintains liaison and effective relationships with other agencies, public and private groups and officials; may assign and review the work of subordinates.

Knowledge and Abilities Required:

Knowledge of: General research sources and sources of socio-economic information; research and statistical methods and techniques used in public planning; report writing; governmental

organization, programs and functions; purposes, principles, practices, methods and techniques of public planning; the planning process; public relations.

Ability to: Plan, organize and conduct comprehensive planning projects; understand and apply research and statistical concepts and methods; read and comprehend a broad range of subjects; collect, correlate, evaluate and analyze facts and develop sound conclusions therefrom; speak and write effectively; develop and maintain effective working relationships with others. Certain positions may require the ability to assign, direct and coordinate the work of others.

PLANNER VI

2.848

Duties Summary:

Supervises and participates in a variety of major planning projects, or serves as planner-in-charge for a major planning study or project of the State's principal planning department and/or as overall coordinator of a major inter-agency planning activity; and performs other related duties as assigned.

Distinguishing Characteristics:

This class involves responsibility for major planning projects affecting private and/or public activity throughout the State. Such responsibility includes planning, coordinating and conducting such projects in accordance with general supervision, and basic administrative and policy guidelines. Public contact in obtaining cooperation and support is evident. A position in this class may supervise a small staff of subordinate planners on a continuing basis, or operate without subordinates but utilize departmental support services as needed. A non-supervisory position in this class exercises significant administrative responsibility in work activity management and/or coordination.

Examples of Duties:

Plans, organizes, directs, coordinates and conducts planning studies; develops planning goals, work plans and schedules including financial and other requirements; as applicable, assigns, directs, coordinates and evaluates the work of planners and other subordinates; establishes and maintains effective working relationships with other agencies; develops project prospectus; directs and participates in the development of plans for major areas of concern, geographic areas or statewide public

activities; presents plans to interested groups and individuals; prepares comprehensive written reports and correspondence.

Knowledge and Abilities Required:

Knowledge of: Purposes, principles and practices of public planning; the planning process; general research sources and sources of socio-economic information; research and statistical methods and techniques used in public planning; report writing; governmental organization, programs and functions; public relations.

Ability to: Plan, organize, direct, coordinate and conduct planning studies and projects; organize and direct the development of plans and recommendations for major concerns and programs; read and comprehend a broad range of subjects; understand, interpret, and apply statistical concepts and methods; review and evaluate planning methods and techniques; assign, review and evaluate the work of others; make effective presentations before groups; write effectively; establish and maintain effective relationships with public and private groups and individuals, including the initiation of cooperative agreements.

PLANNER VII

2.849

Duties Summary:

Directs and coordinates a major subdivision of the State's program of public planning, or several major concurrent planning projects and studies affecting a large and/or significant segment of the program of the State's principal planning department; and performs other related duties as assigned.

Distinguishing Characteristics:

This class involves overall responsibility for all planning projects with regard to a major subdivision, or several major concurrent projects and studies of the State's program of public planning. It represents the work of a supervisory position which may or may not be at the branch chief level but with functions in accordance with broad policy guides.

Examples of Duties:

Establishes broad work plans and priorities; conducts program analyses and develops budgets; reviews operating procedures and policies and recommends revision; reviews and evaluates project

recommendations and assists in making presentations to the Governor and Legislature; initiates cooperative agreements with other public agencies and develops contract agreements with private agencies; speaks before public groups; prepares reports and correspondence.

Knowledge and Abilities Required:

Knowledge of: The purpose, principles and practices of public planning; general research sources and sources of socio-economic information; research and statistical methods and techniques used in public planning; report writing; governmental organization programs and functions; public relations; trends in public planning; principles and practices of supervision.

Ability to: Plan, organize, direct and coordinate a major subdivision of State public planning affecting broad areas of community life and development, or an equivalent level of major concurrent planning projects and studies; establish and maintain effective relationships with public and private groups and individuals, including the initiation of cooperative agreements; speak and write effectively, including effective public speaking.