



**GENERAL DESCRIPTION OF CLASS**

The PLANNER 4 is a policy advisor to senior management and leads major planning activities through expert consultation to executive level managers and professional colleagues on a wide variety of planning issues. Employees give authoritative interpretation of agency policy, regulations and standards applied to long range planning, land use issues, policy and program areas or operating programs.

**DISTINGUISHING FEATURES**

This is the fourth and policy level of a four-level professional series. Work involves major agency policy issues having agency wide or multiple region significance. Employees are assigned controversial planning projects that have far-reaching effects. Projects impact the state, multiple state regions and other public agencies.

The Planner 4 is distinguished from the lower levels by the assignment to establish agency policy having a broad and strategic impact on the state or multiple regional areas.

**DUTIES AND RESPONSIBILITIES**

The duties listed are characteristic of the type and level of work associated with this classification. Individual positions may do all or some combination of the duties listed or other related duties.

**1. Policy Development**

Determine policy, plans and strategies on issues of statewide significance and integrate policy and plans with other agency planning efforts. Develop standards and criteria to guide others in evaluating plans and analytical techniques. Formulate policy and legislative concepts that solve unusually complex or controversial issues. Develop policy documents to guide state agencies and local jurisdictions in policy content and methods of developing long range plans, facility plans and comprehensive plan proposals. Develop legislative concepts and present findings to legislative committees to persuade action and obtain needed project funding. Draft proposals for approval by commissions, regulatory boards and legislative committees. Develop plans and plan amendments; prepare written reports and present information on plans and amendments to commissions, advisory committees, policy boards, executive managers, other regulatory bodies, stakeholders and the public.

**2. Planning Consultation**

Manage state and major regional projects to design, prepare and amend comprehensive public facility and/or land use plans. Consider the implications of agency objectives, legal requirements, program needs, and stakeholder interests while maintaining awareness that proposed answers may establish precedent with considerable future impact. Oversee and give technical advice to professional staff and other agency staff in preparing and implementing planning efforts. Prepare or direct the preparation of comprehensive long-range plans that integrate regional planning efforts and agency planning direction. Plan and execute public involvement strategies to gain input of stakeholders on complex planning issues and policies. Determine funding needs for long-range studies; write funding proposals. Develop action plans and lead others in implementing planning efforts. Educate and counsel internal agency staff and regional or local governments on interpreting and implementing agency, state plans and policies and federal policy. Define issues

and needed processes, and develop implementation plans. Lead agency planners and give advice on methods to achieve local government consistency with state standards and policies. Lead others and give advice on the review of long- range facility and system plans; evaluate and give advice on livability issues. Review and comment on draft plans and respond to questions from agency planning staff from other jurisdictions, other state and federal agencies.

### **3. Research and Analysis**

Lead research studies to analyze current planning practices and implement solutions to planning and policy problems based on research. Develop project statement of work, consultant selection criteria, manage consultants and monitor performance based on contract. Coordinate the implementation of action plans. Lead agency policy and planning research projects; coordinate or lead the efforts of research teams; integrate results from other teams into umbrella project. Represent senior and executive managers on external research project committees. Identify project scope and implications of agency projects. Identify issues requiring technical review and integration with work units of the agency. Research the effects of planning policy on communities.

### **4. Public Involvement and Agency Representation**

Employees are expert in their functional area, and as such give policy advice to the legislature, governor's office, other jurisdictions and state agencies on planning and policy issues and solutions. Lead, design and manage local government and stakeholder involvement in agency planning efforts. Lead policy and steering committees of public members, state agency staff, or public leaders; develop mutually acceptable policies and investment strategies for planning systems and land use. Develop and chair committees to involve the public and local jurisdictions in developing goals and objectives, policy direction and proposed actions. Advise local government on state policy requirements and standards. Attend or lead public involvement events that are part of planning and programming processes; give information to groups on agency and state projects, plans, policies and standards. Attend hearings to support local plans or to bring about agreement to controversial plans. Lead and advise planners in identifying problems and developing cooperative relationships to execute joint planning efforts. Present papers at professional conferences and represent agency on state and national committees.

## **RELATIONSHIPS WITH OTHERS**

Employees regularly contact upper level officials of agencies and local jurisdictions, the business community, attorneys and other special interest groups in person and by telephone to negotiate delicate or controversial issues where the consequences of inadequate presentation have serious implications for agency programs. They work with diverse stakeholders to come to common direction regarding controversial issues. Employees regularly contact planning staff within the agency and local government by telephone, in-person and through written communication to explain policy and procedures, clarify information and give technical advice. They occasionally contact representatives of federal planning programs in person, by telephone and in writing to gather information, obtain funding and clarify expected results. They work with agency decision-making bodies on issues and make presentations to members as needed.

## **SUPERVISION RECEIVED**

The Planner 4 works under minimal supervision. The supervisor evaluates work in terms of effectiveness in working with the constituents, soundness of recommendations, and resolution of significant problems.

Employees work under broad administrative guidance. Employees must adapt or develop policy due to the lack of policy guidance and standards on project issues, they develop policies for individuals within and outside the agency to follow.

**KNOWLEDGE AND SKILLS (KS)****Extensive knowledge of:**

Principles and methods of policy development and applied decision-making models.
Methods of public grant administration and proposal writing.
Principles and practices of project management.
Techniques and methods of negotiation and advance conflict resolution.
Methods and practices of outreach and public involvement.
Techniques and methods of group facilitation and leadership.
Principles and practices of planning related to the agency assignment.
Land-use laws and regulations for local and state communities related to the agency assignment.
Principles and methods of planning research methods.
Principles and practices of public administration and the functioning of public organizations.
Engineering and architectural plans and blueprints.

**General knowledge of:**

Design techniques, tools and principles involved in production of plans, blueprints drawings and models.
Materials, methods and tools involved in the construction of structures such as buildings, highways and roads.
Principles of business management, strategic planning, resource allocation, production methods and coordination of people and resources.
Structure and content of the English language including the meaning and spelling of words, rules of composition and grammar.
Principles and methods of statistics and economics as applied to the planning profession.
Sources and methods of funding public planning projects.
Applicable federal and state regulations and guidelines.

**Skill to:**

Develop policy and planning documents.
Collect, analyze and communicate comprehensive planning research studies.
Involve stakeholders in the planning process, gather information and apply the information to planning projects.
Negotiate solutions to policy and planning issues and bring agreement to conflicts in a mutually acceptable solution.
Understand and interpret planning implications.
Present information persuasively to public or regulatory bodies.
Research information and present complex issues in written form suitable for a lay audience.
Interpret statutes, rules and regulations related to the agency assignment.
Manage, organize and schedule planning projects typical to the work assignment.
Communicate effectively in writing as appropriate for the needs of the audience.
Negotiate to gain agreement and solve conflicts between individuals and groups of people.
Give full attention to what other people are saying, take time to understand the points being made and ask appropriate questions.
Use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
Talk to others to effectively convey information.
Consider the relative costs and benefits of potential action to choose the most appropriate one.
Identify complex problems and review related information to develop and evaluate options, and implement solutions.
Apply general rules to specific problems to produce answers that make sense.

**NOTE:** The KNOWLEDGE and SKILLS are required for initial consideration. Some duties performed by positions in this class may require different KS's. No attempt is made to describe every KS required for **all** positions in this class. Additional KS requirements will be explained on the recruiting announcement.

Adopted 12/2006

Revised

STATE OF OREGON  
Dept. of Administrative Services  
Human Resource Services Division