

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION Office of Project Planning	
WORKING TITLE Project Initiation Document Program District Liaison	POSITION NUMBER 900-074-4721-133	REVISION DATE 06/04/2024

As a valued member of the Caltrans leadership team, you make it possible for the Department to provide a safe and reliable transportation network that serves all people and respects the environment.

**GENERAL STATEMENT:**

Under the direction and supervision of the PID Workload Management Branch Chief, the incumbent works on journey-level staff assignments of average to higher difficulty within the Office of Project Planning (OPP). As a liaison to Caltrans District Offices, the incumbent provides guidance and customer service to district PID staff to approve requesting approval for K phase charging and developing the PID workload for future fiscal years. The incumbent leads in gathering, verifying and analyzing PID workload and expenditure data for periodic reporting to Caltrans executive management and outside agencies. Under the direction of the Branch Chief, the incumbent leads in the development and implementation of PID workload reporting tools, data management practices and PID Program functions. The incumbent recommends program management strategies to the Branch Chief and Office Chief that would correct or minimize identified data errors and unfavorable trends, streamline processes, and address programmatic issues. Some assignments may be given by the Office Chief, and may include assisting with other Transportation Planning efforts. Excellent proficiency in spreadsheet applications is required. Experience with relational database applications and concepts is highly desirable.

**CORE COMPETENCIES:**

As an Associate Transportation Planner, the incumbent is expected to become proficient in the following competencies as described below in order to successfully perform the essential functions of the job, while adhering to and promoting the Department's Mission, Vision, Values, Strategic Imperatives and Goals. Effective development of the identified Core Competencies fosters the advancement of the following Leadership Competencies: Change Commitment, Risk Appetite, Self-Development/Growth, Conflict Management, Relationship Building, Organizational Awareness, Communication, Strategic Perspective, and Results Driven.

- **Creativity and Innovation:** Thinks beyond the confines of traditional models to recognize opportunities, seek creative solutions and take intelligent risks. (Strengthen Stewardship and Drive Efficiency - Innovation)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Cultivate Excellence - Engagement, Pride)
- **Initiative:** Ability to identify what needs to be done and doing it before being asked or required by the situation. Seeks out others involved in a situation to learn their perspectives. (Cultivate Excellence - Engagement)
- **Problem-solving and Decision-making :** Identifies problems and uses logical analysis to find information, understand causes, and evaluate and select or recommend best possible courses of action. (Cultivate Excellence - Innovation)
- **Teamwork and Collaboration:** Sets team structure. Organizes, leads, and facilitates team activities. Promotes team cooperation and encourages participation. Capable of cross functionality and working well with others on a team to achieve personal goals, team goals, and organizational goals. Takes responsibility for individual actions in order to achieve consistent results. (Cultivate Excellence - Engagement)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - Engagement)
- **Communication:** Expresses oneself clearly in all forms of communication. Gives feedback and is receptive to feedback received. Knows that listening is essential. Keeps others in the Division and other functional units informed as appropriate. (Cultivate Excellence - Engagement)
- **Planning and Results Oriented:** Organizes and executes work to meet organizational goals and objectives while meeting quality standards, following organizational processes, and demonstrating continuous commitment. (Strengthen Stewardship and Drive Efficiency - Innovation)
- **Thoroughness:** Ensures that work and information is complete and accurate. Ensures that assignment goals, objectives, and completion dates are met. Documents and reports on work progress. (Cultivate Excellence - Integrity)

**TYPICAL DUTIES:**

Percentage	Job Description
Essential (E)/Marginal (M) <sup>1</sup>	

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

---

40%	E	Under direction from the Branch Chief, the incumbent takes the lead in coordinating with other HQ liaisons and the district offices to gather, verify, and compile PID workload and expenditure data for past, present, and future fiscal years. The incumbent independently performs analysis and prepares workload and expenditure summary information for inclusion in periodic reports, Budget Change Proposals, Finance Letters, District Agreements and other budgetary or reporting documents. This includes analyzing and summarizing statistical program trends, and preparing reports detailing PID workload delivery and PID program expenditures. Reports may be generated annually, quarterly, or on an as-needed basis for the Legislative Analyst's Office, Department of Finance, and other external departments.
30%	E	Under the direction of the Branch Chief, the incumbent leads in the development of guidance pertaining to PID program functions such as the PID workload development process, the PID workload review process, external reporting processes, and other processes as identified. The incumbent recommends program management strategies to the Branch Chief and Office Chief that would correct or minimize identified data errors and unfavorable trends, streamline processes and address programmatic issues. Incumbent may independently participate on cross-functional performance evaluation and process improvement efforts taking place within the Division of Transportation Planning.
20%	E	Under supervision of the Branch Chief, the incumbent serves as liaison to assigned Caltrans district offices by requesting project information, explaining internal OPP procedures to district PID staff, and responding to their inquiries. The incumbent coordinates with district PID staff to review and revise PID workload and expenditure data to ensure accuracy and validity. The incumbent helps to manage the current statewide PID workload by reviewing, processing, and documenting K phase resourcing requests and PID work program modifications from assigned districts throughout the current fiscal year. The incumbent also helps to manage the future statewide PID workload by identifying and prioritizing projects, verifying requested resource needs, and aligning projects and resources with future funding and budget cycles.
10%	M	The incumbent prepares PID Program correspondence, issue memos, fact sheets, data analysis and other written material as required.

<sup>1</sup>ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.

MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

**SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS**

This not a supervisory position.

Supervision is received from the Branch Chief, but may be received from the Office Chief as well. Additional assignments may be generated by requests from the Department's management, Districts, or other HQ units.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

This position requires the incumbent to understand and be able to articulate, both verbally and in writing, research and analysis methods, and their conclusions. The incumbent should have an understanding of and be able to communicate 1) principles, process, procedural practices and legal requirements of transportation planning and programming, 2) principles of project development and traffic operation applications 3) legislative processes, 4) roles and responsibilities of the Federal, State and Regional governments in providing transportation planning services, and 5) current departmental policies and programs.

The incumbent must have the ability to accurately compile, analyze, interpret, and summarize data and to apply analytical techniques to recommend creative solutions to address transportation problems using spreadsheet, word processing, and relational database applications. The incumbent must be able to produce completed staff work and communicate effectively both verbally and in writing. The incumbent must possess the ability to effectively prepare and deliver presentations using a variety of media including but not limited to computer presentation software, paper flip charts, white boards, and strip maps. The incumbent must effectively work individually or as an interdisciplinary team member.

**RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR**

Recommendations and actions made by this position may impact the Departments' overall Planning program and relationships with our regional and local agency and government partners. Actions regarding the Department's programs could result in the inefficient use of state funding, delay of project delivery, and ineffective transportation planning.

**PUBLIC AND INTERNAL CONTACTS**

The incumbent must work cooperatively and effectively with HQ functional divisions, District management and staff, external agencies, and may be required to make formal presentations or provide training at meetings or workshops.

## POSITION DUTY STATEMENT

PM-0924 (REV 01/2022)

### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Employee may be required to use a phone, computer, keyboard, and monitor for long periods of time in an office setting. Must be able to develop and maintain cooperative working relationships by demonstrating tactfulness and treating others with respect, make decisions in a fair and ethical manner, and demonstrate a sense of responsibility and commitment to public service. Must be open to change and new information, adopting new work methods in response to changing conditions or unexpected obstacles, and have the ability to multi-task and complete tasks accurately within deadlines and with short notice.

### WORK ENVIRONMENT

The incumbent works in a typical florescent-lighted, climate-controlled, office environment in an older multi-story State office building. The incumbent must operate usual office equipment.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's evolving telework policy. Caltrans supports telework, recognizing that in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksites with minimum notification if an urgent need arises. The selected candidate will be required to commute to the headquartered location as needed to meet operational needs. Business travel may be required, and reimbursement considers an employee's designated headquartered location, primary residence, and may be subject to CalHR regulations or applicable bargaining unit contract provisions. All commute expenses to the headquartered location will be the responsibility of the selected candidate.

I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

EMPLOYEE (Print)

EMPLOYEE (Signature)

DATE

I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE

### ADA Notice

For individuals with sensory disabilities, this document is available in alternate formats. For alternate format information, contact the Forms Management Unit at (279) 234-2284, TTY 711, or write to Records and Forms Management, 1120 N Street, MS-89, Sacramento, CA 95814.