

**POSITION DUTY STATEMENT**

PM-0924 (REV 01/2022)

CLASSIFICATION TITLE Sr Transportation Planner (Specialist)	OFFICE/BRANCH/SECTION District 9/Planning and Environmental	
WORKING TITLE Project Initiation Document Program Manager	POSITION NUMBER 909-101-4724-922	REVISION DATE 08/16/2024

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 general direction of an Office Chief for Transportation Planning, the incumbent is responsible for planning, organizing, and managing the District's project nomination process and Project Initiation Document (PID) Program, as well as its related resources, including resources that are cross-allocated to other functional units. As the District's PID Program Manager, the incumbent will act as a project delivery liaison with external stakeholders, headquarters, project managers and other functional units such as Asset Management, Regional/System/Investment Planning, Project Management Support, Design, Environmental, Right of Way, etc. to ensure timely delivery of the program according to identified SHOPP and Non-SHOPP funding opportunities and constraints. The incumbent will support Asset Management in development of the 10-year SHOPP Plan, as well as advocate for the development of Non-SHOPP partnership project proposals that advance the State's multi-modal policies, goals, and objectives by advancing projects from planning into programming and project delivery. The incumbent must possess strong communication, partnership, strategic thinking skills, excellent customer service, a deep commitment to the Department's strategic vision, mission, values, and goals, and advancing equity through all efforts.

**CORE COMPETENCIES:**

As a Sr 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. (Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network, Advance Equity and Livability in all Communities - Innovation)
- **Dealing with Ambiguity (Risk):** Can comfortably handle risk and uncertainty, as well as make decisions to act without having the total picture. (Cultivate Excellence - Integrity)
- **Reliability:** Ability to demonstrate dependability in meeting commitments, and providing a consistent work product. Takes responsibility for individual actions in order to meet deadline demands. (Cultivate Excellence, Strengthen Stewardship and Drive Efficiency - Integrity, Pride)
- **Conflict Management:** Recognizes differences in opinions and encourages open discussion. Uses appropriate interpersonal styles. Finds agreement on issues as appropriate. Deals effectively with others in conflict situation. (Cultivate Excellence - Integrity)
- **Teamwork/Partnership:** Develops, maintains, and strengthens partnerships with others inside or outside of the organization through effective communication and collaboration. (Cultivate Excellence - Engagement, Integrity)
- **Customer Focus:** Considers, prioritizes, and takes action on the needs of both internal and external customers. (Cultivate Excellence - Engagement, Integrity)
- **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. (Strengthen Stewardship and Drive Efficiency - Engagement)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Cultivate Excellence - Pride)
- **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 - Pride)

**TYPICAL DUTIES:**

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

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40%	E	The incumbent provides input on development of the District's 10-Year SHOPP Plan and manages the delivery of the District's PID Program, including the development and delivery of the Two-Year PID Workload of both SHOPP and Non-SHOPP projects. The incumbent also ensures the PID program is delivered within prescribed resource levels; troubleshoots and assists with the timely delivery of each and every PID; and develops and maintains positive working relationships with all staff involved with the PID Program including other duties required to ensure the efficient and effective delivery of the District PID Program.
30%	E	The incumbent acts as the District's PID Task Manager for the Project Resourcing and Schedule Management (PRSM) Project Management software. As task manager, the incumbent coordinates with project manager and project development team member requests to change the project schedule or budget, monitors the status of PIDs in the PID Work Program (e.g. scope, cost, schedule, etc.), and coordinates PID Program resources.
20%	E	The incumbent coordinates PID Program activities with the Division of Program and Project Management (PPM) and the Division of Design regarding areas of interaction and of mutual interest, including planning participation on appropriate project development teams; implementation of task management; keeping Division staff/management informed of significant project delivery issues regarding PIDs and capital projects; and coordination of the pursuit of competitive funding sources for proposed capital projects in the PID phase.
10%	M	In collaboration with DOTP Office of Strategic Investment Planning (OSIP), HQ programs, other District functional units, and appropriate local and regional agencies, assist in the preparation of SHOPP and Non-SHOPP project nomination proposals for project initiation. Maintain project information databases to ensure that District projects and priorities are up to date. Present strategies, findings, and recommendations on developing a balanced PID program to District Executive Management in a professional and user-friendly format.

<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**

The position does not supervise. However, this position acts as a project manager or team leader and in that capacity, directs the work of others and the incumbent may act in a temporary capacity to supervise staff in other offices in the absence of the supervisor.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

Must be knowledgeable of Caltrans Mission, Vision, Goals, strategic objectives, programs, laws, regulations and policies of the State of California and federal government, as well as the principles and practices of transportation planning, asset management, and project development.

Must be able to communicate effectively (written and oral) with management and technical/non-technical personnel and work cooperatively with staff from a variety of Headquarters and District Divisions and with external agencies.

Must possess the ability to work independently and as a core member on complex assignments; write creatively and persuasively; research, analyze, and interpret technical data; organize data and information in an easy to understand format by preparing clear and concise reports and professional presentations; collaborate effectively in an interdisciplinary team and with other divisions and programs, both written and oral with all levels of staff; interpret federal and state grant guidelines. Must also have the ability to make timely decisions, develop technically-sound approaches and solutions in developing consensus among stakeholders, perform effectively under stressful situations with strict time constraints, prioritize critical assignments, and quickly adapt to changing priorities to meet immediate deadlines.

Must possess intermediate to advance skills in Excel, Word, PowerPoint, and Adobe, as well as Caltrans databases and systems such as PRSM, Advantage, etc.

Must possess general knowledge of the guiding principles of the Caltrans System Investment Strategy and investment planning strategies, as well as Caltrans' various databases and programming processes.

**Additional Desirable Qualifications:**

Ability to develop and maintain effective relationships internally and externally for successful on-going interaction; knowledge of the PID phase work done by Caltrans and its role in providing an effective multi-modal transportation system; effective team

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leadership experience; multi-disciplinary project management experience; strong interpersonal and presentation skills; ability to develop innovative and effective solutions for transportation problems and effectively implement them.

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### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Errors in guidance, implementation, coordination, and carrying out Federal and State laws and regulations related to the previously identified PID Program Management responsibilities could have negative impacts. Consequences of errors could lead to Districts not having sufficient information to make informed decisions on project development decisions. Errors in guidance, implementation, coordination, and carrying out state and federal law, regulations, and policies could have negative impacts on the Department's ability to fund and provide safe, equitable, sustainable, and multi-modal options to the traveling public. Failing to meet deadlines could result in impacts to the Department's credibility and ability to fund and deliver projects according to project and stakeholder commitments.

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### PUBLIC AND INTERNAL CONTACTS

Routine internal contacts with the District Director's Office, HQ and District program managers, HQ programs and divisions (DOTP Offices, HQ Divisions of Traffic Operations, Financial Programming, Research, CTC staff, Federal Liaison, CalSTA, and others. Frequent involvement with District divisions/programs (Planning, Programming, Project Management, etc.), Regional Transportation Planning Agencies. Contact with USDOT and Federal Highway Administration are less frequent but may occur.

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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

Develop and maintain cooperative working relationships. Must deal effectively with pressure; maintain focus and intensity yet remain optimistic and persistent, even under adversity. Create a work environment that encourages creative thinking and innovation. Enable others to acquire tools and support they need to perform well. Develop new insights into situations and apply innovative solutions to make organizational improvements. Create and sustain an organizational culture, which encourages others to provide the quality of service essential to high performance and productivity. The incumbent must act in a fair and ethical manner, demonstrate commitment to public service, develop organizational improvements, foster a creative and innovative work environment, be willing to take intelligent risks, and value equity and diversity in the workforce. Adjust rapidly to new situations warranting attention and resolution.

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### WORK ENVIRONMENT

Employee will work in an office environment (in-office and home office), but will be required to travel in state to other district offices. Out-of-state travel may also be required to meet attend meetings, conferences, and trainings.

This position may be eligible for telework. The amount of telework is at the discretion of the Department and based on Caltrans's current telework policy. While Caltrans supports telework, in-person attendance may be required based on operational needs. Employees are expected to be able to report to their worksite with minimal notification if an urgent need arises. The selected candidate may be required to conduct business travel on behalf of the Department or commute to the headquartered location. Business travel reimbursements considers an employee's designated Headquarters 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.

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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.)

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EMPLOYEE (Print)

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EMPLOYEE (Signature)

DATE

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

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SUPERVISOR (Print)

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SUPERVISOR (Signature)

DATE