

POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION Transit Grants and Contracts / Specialized Transit Branch	
WORKING TITLE Associate Transportation Planner	POSITION NUMBER 900-064-4721-919	REVISION DATE 9/25/2024

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 of a Senior Transportation Planner (Branch Chief), in the Office of Transit Grants and Contracts, the incumbent works on the Federal Transit Administration (FTA) Grant Programs administered by the California Department of Transportation (Caltrans). To meet California's transportation needs, the FTA Section 5310 (Enhanced Mobility of Seniors & Individuals with Disabilities) program provides operating assistance, mobility management, vehicle and equipment grants to non-profit organizations and public agencies to support mobility options for seniors and individuals with disabilities. In addition to supporting the FTA Section 5310 program, the incumbent also assists with the review of procurement documents; processing of purchasing documents related to capital purchases funded under the FTA programs.

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. (Cultivate Excellence, Advance Equity and Livability in all Communities - Engagement, Equity)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Cultivate Excellence - Innovation, Integrity)
- **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, Advance Equity and Livability in all Communities - Integrity)
- **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. (Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Integrity)
- **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, Enhance and Connect the Multimodal Transportation Network - Engagement, Innovation)
- **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. (Strengthen Stewardship and Drive Efficiency, Advance Equity and Livability in all Communities - Engagement, Equity)
- **Analytical Skills:** Approaches problems using a logical, systematic, and sequential approach. Weighs priorities and recognizes underlying issues. (Enhance and Connect the Multimodal Transportation Network - Innovation)
- **Commitment/Results Oriented:** Dedicated to public service and strives for excellence and customer satisfaction. Ensures results in their organization. (Advance Equity and Livability in all Communities - Engagement)

TYPICAL DUTIES:

Percentage	Job Description
20% E	Independently monitor FTA 5310 funded projects for compliance with program requirements. Provide expert assistance to grant applicants and help with the administration and award management of FTA 5310 funded projects across California.

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POSITION DUTY STATEMENT

DOT PM-0924 (REV 08/2024)

20%	E	Lead coordination with Caltrans staff and FTA subrecipients to develop and evaluate the appropriate vehicles and equipment in support of the transportation needs for the target clientele. Develop quotes, cost estimates, credits, delivery, and OMV fees and taxes. Incumbent independently will follow established procedures and work with the Division of Procurements and Contracts (DPAC) to develop and process purchasing documents through the electronic financial information system. Incumbent maintains accurate documentation that keeps track of purchases and communicates regularly with subrecipients, DPAC, bus dealers, and Caltrans staff.
20%	E	Independently review, evaluate, and approve subrecipient FTA program applications for program conformity with procurement requests and 3rd party contract documents. Review acquisition related requests for goods, services, and commodities to ensure compliance with Federal and State laws, regulations and guidelines. This includes reviewing a checklist for inclusion and ensuring proper procurement documentation. Provide timely communication and feedback to Caltrans staff and subrecipients on procurement document review and corrections. Monitor progress of current solicitations to ensure timely award of 3rd party contracts. Provide guidance regarding the appropriate procurement methods and compliance with federal and state procurement standards.
10%	E	Lead federal program asset management of vehicles and equipment through an on-line database. Asset management requires monitoring and tracking vehicle inventories and releasing vehicles once useful life or mileage standards have been met. Coordinate with grant subrecipients and the Department of Motor Vehicles.
10%	E	Collaborate independently with other branches within the Office to promote cross training and a thorough understanding of federal and state funded transit. Cross train with other FTA grant programs and the Grants Management Branch to provide support, collaboration and flexibility of the FTA grant funding programs.
10%	E	Evaluate and monitor procurement activities of subrecipients to independently verify conformity with FTA requirements in coordination with the local planning processes. Prepare reports, spreadsheets and documents for management in response to audits and other program related reviews.
5%	E	Maintain, coordination and updates to agency monitoring forms and monitoring schedules to ensure maximum efficiency to our grant recipients, District Transit Representatives and the grant programs. This includes leading compliance for bi-annual reporting, FTA and National Transit Database requirements.
5%	M	Create and distribute program fact sheets and other promotional materials to highlight grant program success and the impacts of transit across California. Miscellaneous duties and tasks actions as deemed necessary in order to maintain compliance with program requirements.

¹ESSENTIAL 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

None

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

This position requires familiarity of federal and state laws relating to transportation planning and the funding of transit programs. This position requires the ability to work with others as a team member; to communicate effectively, both orally and in writing. Employees must be able to perceive needs and recognize problems in the broad area of mass transportation financing and monitoring, and establish a course of action which leads to successful solutions for the Department and our customers. Employees must be able to analyze federal and state regulations and laws which impact the federal grant programs. Employees should also display knowledge of the Department's mission, organization, policies, and procedures; Federal and State laws and regulations; concepts and terminology relating to transportation planning; sources of funding transportation programs. To assume responsibility for a broad range of tasks for an assigned functional or geographical area that applies to established procedures and program guidance, this position requires the ability to gather, compile, and extrapolate data using a computer; read and interpret financial statements and audit reports; and to establish and maintain effective cooperative relations with others. Employees also require the ability conduct studies related to State transportation planning; analyze problems and develop appropriate solutions; recommend effective courses of action; evaluate general planning proposals.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Consequences of error can be serious and far-reaching, affecting the Department but also regional transportation planning agencies, transit operators and transit service providers. The incumbent is frequently responsible for making recommendations

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on politically sensitive issues, on new administrative regulations and resolution of disputes brought about in the implementation of the program.

PUBLIC AND INTERNAL CONTACTS

Has a wide variety of regular contacts with persons outside the Division of Local Assistance, by telephone, in writing, and in person, and the most frequently contacts with the Headquarters staff engaged in the federal grant programs. Other regular contacts include district staff; staff from the San Francisco regional office of FTA; and staff from other Caltrans Headquarters programs, including Accounting and Administrative Services (Contracts and Audits). Incumbent will have direct contact with staff of regional and local agencies, non-profit organizations and other stakeholders regarding the federal grant programs.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

This employee should have the ability to develop and maintain cooperative relationships. Must be able to sit and/or stand for long durations and perform tasks utilizing a PC. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice. Must be able to concentrate in order to review and create documents and meet strict deadlines at times. Open to change and new information; adapts behavior and work methods in response to new information, changing conditions, or unexpected obstacles.

WORK ENVIRONMENT

The incumbent works in front of a dual-monitor computer system under artificial light in an office setting with long periods of working in a sitting or standing position. 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. Employee may be required to travel. May need to extend day to complete vital projects.

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.)

I agree that by providing my electronic signature for this form, I agree to conduct business transactions by electronic means and that my electronic signature is the legal binding equivalent to my handwritten signature. I hereby agree that my electronic signature represents my execution or authentication of this form, and my intent to be bound by it.

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