

**POSITION DUTY STATEMENT**

DOT PM-0924 (REV 08/2024)

CLASSIFICATION TITLE Associate Transportation Planner	OFFICE/BRANCH/SECTION Public Transportation-Mass Transportation	
WORKING TITLE Associate Transportation Planner	POSITION NUMBER 907-162-4721-033	REVISION DATE 10/03/2024

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, the Associate Transportation Planner (ATP) provides journey-level staff support in the administration of State-funded transit capital grants from the State Transportation Improvement Program (STIP), Proposition 1A and 1B bonds, Traffic Congestion Relief Program (TCRP), Transit and Intercity Rail Capital Program (TIRCP) and/ or the Federal Transit Administration (FTA) 5311 program. The recipients of these grants are public agencies. The ATP also participates in inter-agency and interdisciplinary efforts such as promoting Bus Rapid Transit (BRT) and Transit Oriented Developments (TODs) that can improve mobility and reduce traffic congestion and emissions on the state highway system, and planning to improve transit security.

**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.

- **Learning on the Fly:** Learns quickly, is open to change, experiments, and is flexible. (Enhance and Connect the Multimodal Transportation Network - Pride)
- **Decision Making:** Makes critical and timely decisions. Takes charge. Supports appropriate risk. Makes challenging and appropriate decisions. (Safety First, Enhance and Connect the Multimodal Transportation Network, Advance Equity and Livability in all Communities - Engagement, Equity, Innovation, 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. (Safety First, Advance Equity and Livability in all Communities - Equity, Integrity)
- **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. (Safety First, Cultivate Excellence, Enhance and Connect the Multimodal Transportation Network - Equity, 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. (Safety First - Engagement, Equity, Innovation)
- **Organizational Awareness:** Contributes to the organization by understanding and aligning actions with the organization's strategic plan, including the mission, vision, goals, core functions, and values. (Safety First, Advance Equity and Livability in all Communities - Integrity, Pride)
- **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, Enhance and Connect the Multimodal Transportation Network, Advance Equity and Livability in all Communities - Engagement, Equity, Integrity, Pride)
- **Conceptual Thinking:** Ability to find effective solutions to issues by taking the appropriate perspective (i.e., holistic, abstract, or theoretical). (Cultivate Excellence, Advance Equity and Livability in all Communities - Equity, 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. (Safety First - Integrity, Pride)

**TYPICAL DUTIES:**

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

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25%	E	Processes local agency requests for allocations of programmed STIP, TCRP and state bond funds, STIP amendments, TCRP and TIRCP applications, and FTA 5311 grant applications. Works with Headquarters Rail and Mass Transportation staff to ensure all information is provided in the format required for California Transportation Commission (CTC) action. The incumbent will maintain current knowledge of STIP, TCRP, TIRCP and transportation bond policies, procedures and issues.
25%	E	Responsible for obtaining quarterly project progress reports from local agencies and providing accurate and timely reports to management concerning the status of grant applications, allocations, project delivery, expenditure of funds and project completion/activation dates. May participate in District or Headquarters workshops for local agencies on funding procedures, transit emergency/ disaster preparedness, BRT, TODs and other current transit topics and provide analysis of proposed local, state and federal transit-related legislation. May participate on partner agencies' Proposal Review Panels to select consultants for planning related contract work. May also assist in orienting and training new employees, providing leadership and serving as project leader on special projects.
15%	E	Reviews requests from local agency grantees for progress payment as frequently as monthly for each project assigned and certifies them for payment by HQ Accounts Payable. Responsible for ensuring that progress payment requests submitted are complete, include only allowable costs in accordance with all reimbursement and financial guidelines set forth by Caltrans and the CTC, and are consistent with the provisions of the grant agreement. The incumbent will disallow ineligible costs, work with local agencies to resolve questionable billings and conduct field reviews of projects and final field examinations required for completing closeout of grant agreements.
15%	E	May be assigned to review and provide briefing notes on Ventura County Transportation Commission (VCTC), Los Angeles County Metropolitan Transportation Authority Board (Metro) and/or Metrolink (SCRRA) agenda items for the District Director, who is an ex-officio member of these boards. The incumbent must become informed about transit issues of interest to the Department that appear on these agendas and prepare accurate and concise briefing notes. Attend Metro and SCRRA Board Committee and full Board meetings and provide post-meeting reports to the Senior Transportation Planner. May be assigned to cover project related Construction Authority Board Meetings such as Foothill Gold Line Extension, Exposition Light Rail Construction Authority and California High Speed Rail Authority, and the Los Angeles-San Diego-San Luis Obispo (LOSSAN) Rail Corridor.
10%	E	Prepares and processes Master Agreements and Program Supplements, amendments and other documents as necessary to implement CTC approved funding and actions. Ensures that information from the local agency complies with CTC resolutions and policies, as well as policies and contractual requirements of the Department. Works with local agency grantees to ensure timely project delivery and to secure time extensions if necessary.
10%	M	Reviews, analyzes and comments on external and internal documents, project reports, etc. from a public transportation perspective as part of the LD-IGR review process. Works with local jurisdictions to identify and negotiate mitigation measures to address the direct and cumulative impacts of proposed development on the state highway system. Reviews various regional planning documents, including Overall Work Programs (OWP), Regional Transportation Plans (RTP) and Regional Transportation Improvement Programs (RTIP) for consistency with federal and state regulations and requirements.

<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 is expected to function independently and is under the general supervision of a Senior Transportation Planner.

**KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS**

- State and Federal laws and regulations related to transportation planning
- The planning process and general practices of transportation planning
- Research methods and techniques including conducting or participating in planning studies, contemporary transportation, environmental, land use, social, economic, fiscal, legal and political issues
- Effective public participation techniques

**Ability to:**

- Evaluate, prioritize and schedule workload to ensure timely completion
- Gather, analyze and interpret data

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- Develop formats to present and display data
- Communicate effectively both orally and in writing
- Prepare written reports in a timely manner
- Work effectively with others as an interdisciplinary team member
- Establish and maintain cooperative relationships within the District and Department, and with the public and outside agencies
- Apply general techniques of insuring participation in the planning process
- Coordinate transportation planning, research and analysis of proposed projects

### Analytical Skill in:

- Performing increasingly responsible and varied assignments under decreasing degrees of supervision
  - Understanding and applying those aspects of federal, state and local laws, regulations, policies, procedures and standards pertaining to the planning process
  - Interpreting maps, site and building plans and specifications, graphs and statistical data
  - Researching, analyzing and summarizing planning data both manually and with basic computer programs
  - Preparing clear visual displays, such as maps, graphs and illustrations
  - Making clear and persuasive presentations of ideas; prepare clear, concise and complete technical documents, reports, correspondence and other written materials
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### RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

Errors in analysis and subsequent recommendations will result in the ineffective use of tax dollars, the loss of substantial time and funds, and potential loss of credibility of the Department.

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### PUBLIC AND INTERNAL CONTACTS

- This position requires extensive contact with staff of local government agencies, other units in the District, Headquarters staff, consultants, developers and various community-based organizations
  - The position may represent the Department regarding planning issues at public and agency meetings for projects regarding specific subjects
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### PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

- Employees may be required to sit for long periods of time using a keyboard and video display terminal
  - Employees may be required to move large or cumbersome reports from one location to another
  - Must have the ability to multi-task, adapt to changes in priorities and complete tasks or projects with short notice
  - Most of the jobs in the Division require interaction with many people; therefore it is important that the employees work with others in a cooperative manner
  - Values cultural diversity and other individual differences in the workforce
  - May be subject to and have the ability to handle irate or intense public or other project team members in a calm manner
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### WORK ENVIRONMENT

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.

While at their base of operation, employee will work in a climate-controlled office under artificial lighting. Employee may also be required to travel and attend meetings outside the district office in-state. The work environment characteristics described here are representative of what an employee encounters while performing the essential functions of his job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The work will occur in an office and field environment. Employee may work at workstations within shared cubicles. While performing the duties and responsibilities, the employee may be exposed to loud noise, electricity, moving mechanical parts, varying weather conditions, and other related conditions and situations.

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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.)

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.

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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

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